



GROWTH DEAL & COMPLEMENTARY FUND

Proposition Papers

COMPLEMENTARY FUND	PAGE
Industrial Investment Challenge Fund - Part 1	4
High Street Challenge Fund - Part 1 (Physical Infrastructure)	5 - 10
Digital Channels and Enhancement of Visitor Experiences - Part 1	11 - 20
- Development of the O'Neill Tourism Proposition	21 - 24
- Armagh City Reinvigoration	
Cuilcagh Lakelands Geopark Part 1 (Redevelopment of MA Visitors Centre, Cuilcagh Boardwalk , Smugglers Way - Marble Arch to Killykeegan)	25 - 34
Denny Site, Portadown	35 - 36
Desertcreat	37 - 40

ENABLING INFRASTRUCTURE	PAGE
A4 Enniskillen Southern Bypass	42 - 47
A28 Armagh East Link	42 - 47
A29 Cookstown Bypass	42 - 47
Rural Broadband	48
Industrial Land - Omagh	49 - 54
Industrial Land - Banbridge	55 - 59
Transformation of M12 Carn and Seagoe Industrial Zone	60 - 64
Armagh Goal - Site Development	65 - 67

BOOSTING INNOVATION & DIGITAL CAPACITY	PAGE
Engineering and Skills Innovation & Skills Academy SWC	69
Industrial Investment Challenge Fund – Parts 2	70
NI Agri-Food Robotics Centre - CAFRE	71 - 75
Incubation Space - Food Development (concepts requiring further development)	76 – 78
Agri-Tech Facility	79
Network of Digi-Hubs	80 - 84
High Street Challenge Fund - Part 2 (Digital)	85 - 90
Digital Channels and Enhancement of Visitors Experiences - Part 2	91 - 100
- Development of the O'Neill Tourism Proposition	101 - 104
- Armagh City Reinvigoration	
Cookstown Health & Care Hub	105 - 111

BUILDING A HIGH-PERFORMING TOURISM ECONOMY	PAGE
Sperrins Tourism Development	113 - 122
- Sperrins Future Search	123 - 126
- Ulster America Folk Park	127 - 133
- Gortin Glens	
Cuilcagh Lakelands Geopark Part 2 (Smugglers Way - Killykeegan to Cavan Burren, Development of Greenway from Belleek to Ballyshannon)	134 -143

SKILLS	
MSW Skills Action Plan	

COMPLEMENTARY FUND

INDUSTRIAL INVESTMENT CHALLENGE FUND – PART 1

Paper to be provided by AMcK end March 2021

TRANSFORMING OUR HIGH STREETS – Part 1 (Physical)

The purpose of this paper is to set out the case for much needed investment into Mid South West (MSW) Regional High Streets to enable a process of reinvention and transformation, reshaping our town centres by implementing ambitious, innovative and fresh interventions.

The term 'high street' is used throughout the paper to describe the principal shopping area of our regional town centres.

BACKGROUND – THE CHALLENGES FOR MSW HIGH STREETS

The role and presence of our high streets has shifted dramatically in recent decades as a result of the inexorable rise of online shopping, change in global trends and national issues like austerity. The need to live more sustainably combined with addressing changing customer behaviours has resulted in high streets needing to be reinvented, repurposed and attract a mix of uses beyond the buying and selling of goods. Furthermore, the physical configuration of our high streets has shifted since the 1980's giving way to a more mixed picture to where people shop, with an increasing bias towards prime out-of-town locations and retail parks. Whilst it is acknowledged that this shift has brought many benefits to consumers and overall retail performance, we recognise the significant impact on our declining town centres creating longer term sustainability challenges.

MSW region high streets are facing significant challenges as a consequence of lack of competitiveness due to higher operating costs than online competitors (eg property costs), underperformance, evolving economies, developing capability and changing technologies, advancements in artificial intelligence and automation, and the impact of coronavirus. These challenges have been further amplified with the implementation of mitigation measures to ensure customer safety, more precautionary consumer actions and subdued confidence levels leading to further decline in footfall and customer spending.

During lockdown multiple aspects of our shopping habits changed, resulting in people rediscovering their local areas and rethinking what they want from villages, towns and high streets, not just in relation to consumables. The reality of this 'new normal' has brought customer expectations into sharp focus with the demands for a different high street experience, one which embraces culture, community and everyday economies, digitally smart technologies and infrastructures, provides access to services, gateways to recreational and greenspaces, promotes active travel and considers accessibility for all users.

MSW high streets are facing the following common challenges and trends (in no particular order):-

- Dramatic impact of Covid-19 and social distancing/capacity requirements as a direct consequence of the pandemic and adjusting to the “new normal”;
- Building consumer confidence to visit high streets;
- Accelerated trend towards online shopping
- Changing shopping habits/patterns e.g. more people shopping during the week and/or on an ‘as needed’ basis;
- Declining footfall and spend across high streets;
- Rising vacancy and dereliction levels;
- Contracting retail sector/retail declining as a dominant occupier in town centres;
- Decline in traditional outdoor markets;
- Protecting the current business base;
- Falling market demand/low level of investor confidence;
- Rising costs of doing business and the need for rates reform;
- Changing work patterns, with more people working flexibly and remotely;
- Rising unemployment affecting disposable income;
- Constrained areas for transport modes, pedestrian, cycle and vehicular;
- Increasing traffic congestion, air pollution and climate emergency (green agenda);
- Achieving sustainability and inclusive economic growth;
- Need for functional shared spaces for the community to reconnect with each other e.g. pop-up parks;
- Uncertainty of Brexit impacts;
- Changing demographics including a growing elderly population.

THE OPPORTUNITY FOR MSW HIGH STREETS

Notwithstanding the coronavirus crisis an opportunity exists for MSW to reimagine, regenerate and transform its high streets for the future, and indeed shape the ‘new normal’. It is an opportunity to recognise uniqueness and how local assets can be best developed and used to create safer, more attractive, accessible and vibrant places. MSW high streets must adapt and diversify into ‘multi-functional places’, which no longer rely on retail but offer wide ranging uses which contribute to the economic performance of the area as a whole.

MSW high street interventions must ultimately create the conditions that will attract greater numbers of people to live, visit, shop, work, walk and play, which collectively will increase spending in the region. As retail, society, technology and consumer behaviours continue to change, this transformation is essential not only to survive but to thrive. Interventions must therefore be significant in scale, scope and ambition in order to derive maximum benefit.

Multifunctional high streets will concentrate retail uses in primary cores with a wider range of commercial, cultural, community and residential uses encouraged to locate and revitalise secondary and tertiary areas. Success can be measured in

harmonising a broad mix of uses such as enterprise, residential, civic and cultural buildings, green spaces, offices etc.

The following opportunities have been identified to support the transformation of MSW high streets:-

- **Reimagining the physical and digital infrastructure** of Armagh, Banbridge, Craigavon, Lurgan, Portadown, Enniskillen, Omagh, Cookstown, Dungannon and Magherafelt;
- **Reviewing land uses** with a view to delivering viable multi-functional centres e.g. community, retail, office, hospitality, entertainment, housing, leisure etc;
- **Delivering smart technology** solutions and provide for inclusive digital connectivity – consideration of the revolutionary impact of digital technologies to create smart towns/city;
- **Wider place shaping** and urban regeneration through which high street rejuvenation will be embedded;
- **Identity** branding our high streets and town centres to show how the destination is unique and differentiates (and the experience they offer) from competitors'. The heritage and natural assets of our urban centres are often lost or hidden away due to a focus on historic uses that no longer occur or are considered irrelevant to the day-to-day functioning of the centre;
- **Quality of public realm** – transforming our high streets to be more accessible, for instance: rethinking parking provision, making wayfinding easier, provision of sustainable transport solutions etc.

An opportunity exists for MSW to introduce high street initiatives and interventions that will meet the needs of communities and customers now and into the future by investing in the right offering, facilities and experiences which will ultimately drive economies and footfall. MSW councils do not underestimate the challenges ahead and recognise that a place shaping approach, one which requires collaboration, collective action and decision making in the planning and delivery of targeted interventions is needed. Focus will be placed on shifting mind-sets from the traditional high street offering to more vibrant centres capitalising on natural assets and everyday economies, opportunities for increased social interaction and dwell time, access to services and maximising benefit for a broad mix of users.

A VISION FOR MID SOUTH WEST HIGH STREETS / TOWN CENTRES – POWER TO CHANGE

High streets are at the heart of our communities and are in a good position to reinvent and transform themselves. It is important to be bold in setting a vision which focuses on our high streets becoming more attractive, vibrant, diverse, inclusive, healthy and safe places to invest, work, live, meet, shop and visit.

MSW will create modern, vibrant and economically thriving urban centres taking advantage of the existing natural assets, heritage, cultures, neighbourhoods, and requirements of our residents and visitors to drive prosperity.

WHAT WE ARE GOING TO DO

MSW will deliver both a targeted and trial programme of interventions that will transform the economic, environmental, physical and digital infrastructure of our urban centres. Interventions will be test beds for new opportunities and will facilitate the delivery of creatively designed residential, leisure, retail, enterprise and infrastructure to connect people, places and spaces.

MSW aims to deliver targeted initiatives that will be:

- **Transformative** addressing under investment in our high street destinations to deliver exemplar places that will showcase and provide for current, emerging, and future priorities.
- **Vibrant** building an ecosystem of trade for the future with returning day and evening activity and footfall to key areas.
- **Unique** focusing on the natural, historic and cultural assets within our high streets/town centres to create a complementary smart and high tech identity.
- **Liveable** delivering residential living within our urban centres which will provide a range of social, cultural and economic opportunities.
- **Diverse** reflecting how people wish to live, work, enjoy their free time and support their local economy through a wider range of viable uses which are complementary to a more concentrated retail core.

The overall thrust and vision for our high streets will be based on the principles of determining change, promoting inclusive economies, design for mixed uses, managing assets innovatively, trialling new approaches and digitally transforming. Focus will be placed on experimental, strategic and pivotal initiatives which address transformation, underinvestment and underperformance through the targeting of key properties, historic and culture assets, long term vacancy and opportunity sites. This will involve investing in a combination of strategic capital and marketing projects.

The 'Transforming our High Street' intervention would incorporate the following **two** component parts-

1. Creating Spaces and Places for the Future

A capital financial support package to enable physical transformation through the acquisition, demolition, reconfiguration, rebuilding, revitalisation and/or redevelopment of properties/assets/sites/public spaces in order to unlock their economic potential. Unlocking their economic potential will act as a catalyst for high street revival, showcase new opportunities and an intense mix of uses, provide connectivity and infrastructure that will undergird transformation and

redevelopment, and improve the visual amenity, identity and connectivity of an area. This component part will also provide challenge funds to incentivise property owners to invest in the reuse and repurposing of their derelict/empty premises to create modern, lettable and digitally connected commercial and/or residential spaces. A wrap-around service to assist property owners to test innovative approaches and management when securing tenants for disused/underutilised commercial premises will be introduced.

2. Connected for the Future

This component part will deliver major digital and eco-friendly initiatives to reinvigorate MSW high streets. Focus will be placed on the development and implementation of adaptive, connected technologies and sustainable interventions to create 'smart towns' and provide a 'digital springboard' for businesses to maximise the benefits of the digital economy. Interventions will include provision of high speed connectivity including 5G technology integration, smart and enabling technologies, big data capability, green transport systems and building innovative construction solutions to deliver high tech infrastructural improvements/advancements. Carbon emission reduction, adoption of green building practices and green growth will also be key in delivery of interventions. In addition, interventions will look to showcase and promote the latest available technologies and digital applications/tools that will help grow the region's urban centres as unique, modern, connected, healthy and sustainable places to live and work.

Both component parts will support the viability and vitality of our rapidly evolving high streets by unlocking economic potential and leveraging private sector investment.

CONCLUSION

MSW Region high streets have reached a turning point. Lessons learned in recent years show that greater innovation, collaboration, collective action and decision making, and significant financial investment are all necessary to support a process of transformation in order to meet the evolving needs of consumers, businesses, investors and communities.

MSW councils recognise that reinvention and transformation of the Region's high streets will require substantial commitment and investment from the Northern Ireland Executive, UK Government and other funding sources. Such investment will enable our high streets to be convenient, connected, enterprising, offer certainty of product availability, provide experiences that cannot be replicated online, and an intense mix of uses to become places of choice for communities to live, visit, shop, work, walk and play.

The interventions to be delivered in achieving the ambitions for our High Streets are significant, but appropriate in light of the challenges faced. It is anticipated that the NI

Executive will invest in Part 1 'Creating Spaces and Places for the Future'; and the UK Government in Part 2 'Connected for the Future'. Although we are seeking investment for the component parts from the two separate sources, we anticipate that both parts will be delivered in parallel.

DEVELOPMENT OF 'THE O'NEILL' TOURISM PROPOSITION

The Mid South West (MSW) Region encompasses two of the most important historic sites in Ireland; Hill of the O'Neill and Tullaghoge Fort. Both attractions are of major historical and cultural significance within Irish history and have an exceptional ability to drive footfall to Co Tyrone and the wider Northern Ireland region. This paper will document the much needed interventions that are required to elevate Hill of The O'Neill and Tullaghoge Fort in providing a significant proposition and competitive advantage to position MSW region within the 'all island' visitor economy. These ambitious interventions will take a three pronged approach with focus on the creation of exceptionally high quality product development, the implementation of state of the art digital solutions and the enhancement of the tourism infrastructure. The innovative, ground breaking interventions proposed will uplift these visitor attractions and in addition the town of Dungannon onto the world stage, competing with internationally renowned immersive visitor experiences.



Above map shows the location of Hill of The O'Neill, Dungannon and Tullaghoge Fort near Cookstown

HISTORICAL CONTEXT

In the late 16th Century, Dungannon was the powerbase of Gaelic Ireland and the centre of world affairs as Hugh O'Neill, Earl of Tyrone challenged English rule in Ireland. The Nine Year's War, often referred to as Tyrone's rebellion, was the climax of English attempts to conquer Ireland dating back to the Norman invasion in the 12th century. With Spanish military assistance, the powerful military alliance led by Hugh

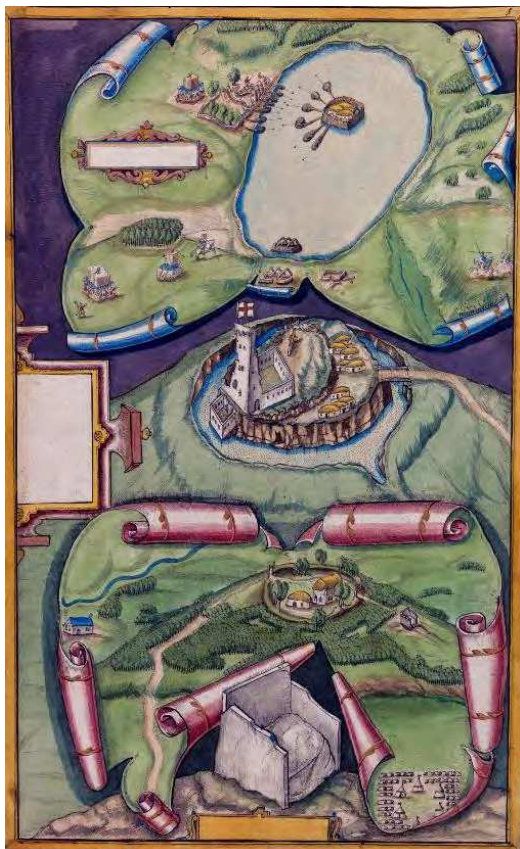
O'Neill of Tír Eoghain and Red Hugh O'Donnell of Tyrconnell, threatened to defeat the English at the Battle of Kinsale on December 24, 1601.

The Gaelic chieftains were defeated at the Battle of Kinsale and Hugh O'Neill and Red Hugh O'Donnell were eventually forced to leave Ireland, in what is now known as the "Flight of the Earls," in 1607. The two Irish chieftains accompanied by over ninety of their followers, set sail from Donegal, bound for Spain. This period in Irish History effectively ended the Gaelic order in Ireland and paved the way for the "Plantation of Ulster".

The Flight of The Earls in 1607 is unquestionably one of the most pivotal events in Irish history, during which the Earls of Ulster fled from Ireland to Europe to avoid being captured and imprisoned by the English. This signified the end of an era in Irish history, of Ireland being ruled by Gaelic chieftains. While the English had been present in parts of Ireland since the 11th century, it was only after the *Flight of The Earls* that the English took control of the entire country. In the period that followed, major changes occurred as the English seized the opportunity to complete their plans for the Plantation of Ulster. The events that happened during this historical period helps to explain the complexion of the Northern Ireland in which we live today.

Tullaghoge Fort and Hill of The O'Neill fall within the Mid Ulster District Council area. Tullaghoge Fort, Cookstown was the historical O'Neill seat of power and inauguration site from the 11th century. While the O'Neill's later moved to the strategic hilltop in Dungannon in the late 13th century, Tullaghoge Fort remained as the site where generations of future O'Neill's would be inaugurated as the Chieftain of Tír Eoghain, high king of Ulster. Both locations are impressive with commanding views over the vast swathes of lands controlled by The O'Neill's for nearly 400 years, reflecting their dominance over a significant period in Ireland's history.

The story of the Gaelic chieftains notably spans across the MSW region and indeed throughout Ireland. The collective history within the region provides us with significant competitive advantage over other areas. Capitalising on this historical narrative will not only benefit the Mid Ulster region but also has potential for the entire MSW area and will act as a catalyst for partnership projects encouraging working as a collective to elevate the tourism offering within the region.



English cartographer, Richard Bartlett's historic depiction (circa 1602) of Hill of the O'Neill Dungannon (centre) and Tullaghoge Fort, the crowning site of The O'Neill's (bottom) depicting the Leac na Rí (seat of kings).

Historically referred to as "Bartlett's map" this image clearly demonstrates the significant connection between both Tullaghoge Fort and Hill of the O'Neill in this period of Irish History, a connection that has continued to the modern day.

BACKGROUND

These two cultural heritage locations have major significance within the context of Irish, British and European history and should be matched with investment that positions them amongst the leading Cultural Heritage attractions within Ireland that appeal to national and international visitors.

Currently both locations and, by association Dungannon town, struggle to compete within the tourism market due to a number of interdependent factors. Firstly, an over reliance on traditional methods of interpreting this intriguing and central story in our shared history. There is an increasing requirement for strong experiential tourism. Investment is required to fully realise the economic, cultural and social potential that exists to transform and re-imagine the heritage offering and to capitalise on the story of the O'Neill's and the history of Ireland's Gaelic chieftains.

Tourists/visitors to cultural heritage sites now demand "info-cultural-tainment" experiences combining leisure, entertainment, culture, education and sociability. As a result, Cultural Heritage and tourist attractions are using modern technologies, such as Augmented Reality (AR), to enhance visitor attractions with, and perceptions of their real-world environment. AR is widely regarded as one of the most promising and cutting edge technologies of modern times and its development and implementation in a cultural heritage setting provides opportunities for increasing competitiveness; to create new value at cultural heritage sites where visitors can

explore the unfamiliar surroundings in an enjoyable and unique way; contributing significantly to an enhanced and enriched cultural heritage experience; and providing greater scope to reach wider audiences than ever before.

Secondly, Dungannon town centre, despite its rich heritage and central position in Irish history, faces significant challenges. Like many high streets and town centres across the UK, it too is encountering a steep decline in footfall. Given its historic town status, Dungannon is largely dependent upon the travel tourist to attract footfall into the town centre.

Lack of accommodation and hotel provision presents challenges in attracting visitors, with the majority of beds available centered in Belfast. Dungannon, despite its central location, has no hotel provision. Notwithstanding the historic challenges of no overnight stay provision, now there is an opportunity to replicate the successes of projects undertaken elsewhere in NI in the acquisition, restoration and redevelopment of key historical assets as boutique style accommodation and other complimentary facilities. Unlocking this economic potential will act as a catalyst for leveraging private sector investment into Dungannon town centre together with enhancing the visual aesthetics of the heritage townscape.

CHALLENGES

The emergence of new adaptive and interactive technologies has transformed the Tourism sector. These technologies have revolutionised travel behaviours, such as decision making and information searching, radically transforming traditional business channels and value networks. To be competitive and financially viable within the rapidly developing Cultural Tourism sector it is necessary to pursue new ways of providing enhanced, enriched and unique visitor experiences, while also offering value added services at Hill of The O'Neill, Tullaghoge Fort and the development of Dungannon as a historic visitor destination.

The MSW region faces the challenge of attracting visitors inland. Visitors continue to be drawn to the world renowned Causeway coastal route. In 2019 Tourism Northern Ireland launched the 'Embrace the Giant Spirit' brand. A significant objective of this initiative, was to ensure greater dispersal of the tourism offering across Northern Ireland. The growth of the industry increased more rapidly than anticipated with NI "welcoming 5.3 million visitors in 2019 who spent an unprecedented £1 billion".

In addition, there has also been a greater demand from tour operators for new experiences and attractions in Northern Ireland. Mid Ulster and the wider MSW region is rich in archaeological, heritage and cultural tourism. Through closer collaborative working investment in the growth and development of these prestigious historical assets, and the implementation of immersive digital technologies will create a world class visitor destination. This transformation will deliver a competitive heritage offering and become a critical economic driver in rejuvenating Hill of The O'Neill, Tullaghoge Fort and Dungannon town.

OPPORTUNITIES

A key strand within the Mid Ulster District Council Tourism Strategy is archaeological sites, history and heritage. The strategy highlights that “*Mid Ulster is the only place to appreciate the history and importance of the O’Neill’s and the Flight of the Earls, while also being at the centre of the C17th plantation movement*”. The strategy recognises the uniqueness of the district to exploit the history of the O’Neill’s, the Flight of the Earls, and the development of the plantations offering a significant and compelling tourism proposition, exploitation of which will give not only Mid Ulster but the entire MSW region significant competitive advantage.

In 2016 there were 7.3 million visits to heritage attractions in Northern Ireland, including historic properties, museums and art galleries, visitor and heritage centres, workplaces and places of worship (Source: NISRA). When we invest in heritage we support business growth, increase tourism, attract new business and create jobs. UK studies show that the historic environment offers a high return on investment. Each £1 invested generates up to £1.60 of additional economic activity over a ten-year period.

Since 2017, both Hill of The O’Neill and Tullaghoge Fort have witnessed limited growth in visitor numbers (see below). Significant investment in the heritage sites proposed, through the use of immersive and innovative digital technologies, has the ability to radically transform the potential of the unique heritage offering within the region, increase visitor numbers and spend, and establish the region as a national and international heritage and cultural tourism destination.

Visitor numbers to Tullaghoge Fort

2017 (Jan-Dec)	12,000
2018 (Jan –Dec)	11,213
2019 (Jan –Dec)	10,778
2020 (Jan-Dec)	13,989

Paying Visitor Numbers to Hill of The O Neill

2016/17 (April-March)	49,546
2017/18 (April-March)	84,645
2018/19 (April-March)	55,861
2019/20 (April-March)	52,954

The proposed interventions at the sites will contribute significantly to both profit generation and economic growth for the MSW region heritage tourism sector. Studies have shown that if “visitors have a better experience using AR, they are likely to stay longer which would increase their likelihood of spending more money in the region. In turn, this would create a better reputation, broadening the target market, while attracting more visitors, increasing ticket sales and use of local infrastructure, as well as creating more tourism spend to invest back into the area”.

Key Economic Benefits of Heritage Tourism

- Heritage tourism is a vital part of the UK economy. In 2015, domestic and international tourists made 192 million trips to visit the UK’s cultural, historic and natural assets. They spent £17.5 billion while doing so.

- The heritage tourism sector itself generated an £8.8 billion gross value added contribution to UK GDP and 191,000 jobs.
- In Northern Ireland heritage tourism supported gross value added contributions to GDP of up to £1 billion.
- In terms of share, natural and non-natural heritage attractions made similar contributions to the UK economy, although average spend is slightly higher for non-natural attractions.
- Heritage tourism is high-value. Relative to all tourists on holiday and visiting friends and relatives, those visiting heritage attractions are more likely to be overseas visitors, who spend on average £560 per trip, or domestic overnight visitors, who spend on average £210 per trip, rather than domestic day visitors who spend circa £35 per trip.
- The heritage tourism sector also supports jobs throughout its supply chain by purchasing inputs of goods and services.
- Wage payments made by the heritage tourism sector and its suppliers support additional economic activity and jobs.

THE VISION

Our vision is to create a strong unique heritage proposition within the sector that will elevate the historic townscape of Dungannon and two of the most strategically important sites in Ireland; Hill of The O'Neill and Tullaghoge Fort, into an unrivalled world class tourism attraction and destination. This will be achieved through:

- introduction of interactive sculptural pieces;
- location specific innovative and interactive lighting solutions to connect the visitor to Hill of The O'Neill, Tullaghoge Fort and the town of Dungannon;
- enhanced product development to include for example innovative technologically driven public events and performances;
- creation of a strong infrastructure, and technologically advanced and connected day and evening visitor experiences;
- providing visitors with the full panoptic experiences across the vast swathes of surrounding lands;
- provision of new, improved and repurposed enabling infrastructure to realise the full potential of the historic locations including for example roads, public transport, utilities, parking, active travel and signage;
- an array of immersive and social experiences tailored to suit a broad range of groupings and ages.

Through these interdependent interventions we will extensively enhance the tourism offering within the MSW region which will appeal to the culturally curious market including visitors from: Northern Ireland, Ireland and beyond. In addition, these developments will act as substantial economic drivers of growth, increase competitiveness, market share and significantly grow GVA. It is anticipated that the interventions proposed will increase current visitor numbers and spend in the region tenfold over the first five-year period.

WHAT WE ARE GOING TO DO

1. Implementation of state of the art digital solutions

Installation and further extension of innovative and digitised exhibition offering at Hill of the O'Neill and Tullaghoge Fort.

Development of AV filming with cutting edge special effects at Hill of The O'Neill and Tullaghoge Fort, transporting the visitor back to a time when Chieftains ruled Ireland.

Development of AR immersive technologies - Deep frame technology, including AR APP technology that signposts visitors to areas throughout the MSW region, including AR enhanced fixed binocular stations that spans across the lands ruled by the O'Neill dynasty.

We seek to create state of the art attractions that combine a suite of immersive soundscapes and lightscapes to link Dungannon Town to the Hill of The O'Neill. Multi-screen projections, physical props and structures, 360 degree projections and Augmented Reality (AR) portals will enable visitors to delve into our complex history through an innovative, imaginative, inspiring, engaging and fully immersive experience. An experience that connects the heritage sites of Tullaghoge Fort, Hill of The O'Neill and the town of Dungannon to encourage the visitor to explore the townscape, the architecture and the history associated with the buildings. These interventions will take visitors through a journey; one that is unique to the region and pushes the boundaries of traditional heritage attraction experiences, immersing them in this significant period of Irish history. This proposition can equally be expanded to benefit the entire MSW region with various linkages to notable connected sites to the story of The O'Neill's and the Clans of Ulster, notably the site of the Battle of The Yellow Ford in Armagh, Enniskillen Castle and the ancient O'Neill crowning site at Dun Ruadh which lies on the border between Mid Ulster District Council and Fermanagh and Omagh District Council.

2. Product Development

Removal of telecommunications mast located at Hill of The O'Neill

During the Troubles, the site of Hill of the O'Neill was used as an Army base under the control of the Ministry of Defence, at which time a telecommunications mast was erected on the historic site. Despite the fact that the site is no longer used as a military installation, the telecommunications mast has remained and continues to be used by telecomms providers and as a transmitter for local emergency services. The mast is an imposing structure that dominates both the heritage site and the wider landscape of Dungannon Town Centre and significantly



detracts from the visitor experience (as can be seen from attached image). The intervention proposed will require the mast and the metal walkways onsite to be removed, thus ensuring that the aesthetics and visitor experience of this location is greatly enhanced. A significant proposition for development will be the replacement of the mast with a site specific interactive sculptural piece and viewing platform that will connect the site to the town centre of Dungannon and provide visitors with a focal point in its own right, but also provide visitors with unrivalled views of seven counties that was once ruled by the O'Neill dynasty at the height of their reign as Chieftains of Tír Eoghain and High Kings of Ulster.

Unearthing the 16th century tower house remains

The Channel 4 *Time Team* television programme visited the site in 2007, during which time a large area of the site was excavated and which uncovered the walls of O'Neill's medieval tower house, surrounded by a section of wall belonging to the military fort that was constructed by Arthur Chichester after he gained possession of the hill fort in the early 17th century. This important historical feature will be re-exposed and covered with a transparent walking surface allowing visitors to view these significant archaeological structure underfoot. The feature will also be enhanced through the use of AR technology to enhance the presentation of the archaeology that has remained unseen for in excess of 400 years.

Art sculptures at Tullaghoge Fort and Hill of The O'Neill

The creation of two interactive sculptural art pieces developed to reflect the historical significance of both sites. These sculptural pieces will be further enhanced through the use of augmented reality solutions and will connect the story of each site location as well as linking to the heritage town of Dungannon.

Creation of C16th Gaelic Irish Wattle and Daub dwelling

There is growing emphasis and demand to create authentic tourism experiences where the visitor can take part and feel fully immersed in history. The creation of a native Irish dwelling provides an imaginative and compelling experience, allowing us to expand our appeal and market share to include Aspiring Families (TNI). This will be augmented through the use of living history digital solutions to recreate the sight, sounds and smells of a 16th Century dwelling, contributing to a unique and memorable visitor experience. As the domestic market will be a key component for the success of the tourism sector in Northern Ireland moving forward, by extending our target market into this core segment will present additional opportunities to drive continued and sustained growth. This will also support and enhance existing education programme provision making it more attractive to schools throughout Ireland to visit The Hill of The O'Neill, Tullaghoge Fort and Dungannon Town.

Creation of Educational Resource Area at Tullaghoge Fort

This resource will create the capacity to offer a year round educational programme as well as enhanced visitor experience through the use of innovative and immersive digital technologies to convey the history of the site in an engaging and fully immersive manner and connect Tullaghoge Fort to the Hill of The O'Neill and Dungannon town.

Development of heritage townscape

The cumulative interventions will stimulate and support the wider economic regeneration of Dungannon by enhancing its distinctive historic character. Through the use of new innovative technologies such as smart, sustainable lighting systems and innovative digital solutions we will connect the historic hill to the town centre to increase awareness of the rich built and cultural heritage of Dungannon. Thus depicting how the Ulster Plantation impacted upon the architecture and creation of Dungannon town as we know it today.

3. Enhancement of tourism infrastructure

Refurbishment of the events space at Hill of The O'Neill

The Events Space is located on Hill of The O'Neill and has capacity for 1200 people. Unique in its architecture, it includes a 360 degree viewing tower, meeting room and large outdoor auditorium. It does however have seasonal restrictions, as it is primarily an outdoor venue, and many of the events delivered are largely dependent on weather conditions.

The enhancement of this space, through the creation of immersive interactive LED touch screen walls that will relay the history of the O'Neill dynasty, the Flight of the Earls and the plantation of Ulster period to the visitor, will also enable large scale indoor events to be staged. Thereby acting as a key economic driver and catalyst for the regeneration of the area, creating jobs, boosting both the daytime and night time economy and escalating the tourism infrastructure and offering to an international level.

Restoration of historic buildings connected to Dungannon Heritage (Longer Term Ambition)

As a part of our longer term ambitions we will seek to acquire and/or partner with private sector to reimagine key historic buildings located in Dungannon centre to further enhance the historic prominence of the town which could be developed to create boutique style accommodation and/or other complimentary facilities. The benefits from the restoration and repurposing of other historic buildings within Northern Ireland is demonstrated by examples such as Titanic Drawing rooms (Titanic Hotel)

and Northern Counties building (Bishops Gate Hotel). This intervention would act as a significant catalyst for the future development of the area, creating long term benefits in terms of confidence building, economic development, and stimulation of private sector investment, job creation, and regeneration of Dungannon.

CONCLUSION

The O'Neill story is at the centre of Irish and European history. It has been included in the Tourism NI brand for Northern Ireland 'Embrace A Giant Spirit' as a unique authentic, experience. The MSW region has significant competitive advantage in terms of heritage and the ability to exploit the story of The O'Neill's, the Flight of the Earls and the Plantation of Ulster. This strong proposition enhances the competitiveness of the area as it allows the visitor to understand this significant period in Irish history.

Significant investment is required to improve the infrastructure, innovate and enhance the visitor experience to compete in a highly, competitive market place. Through the development of this innovative and exciting proposition MSW will foster greater partnerships across the region and further build upon the story and the historic heritage offering at Hill of The O'Neill and Tullaghoge Fort through digital and immersive technologies, product development and enhanced infrastructure. Delivering on this ambitious proposition will require partnership working at all levels including Mid Ulster District Council, DFC Historic Environment Division, NI Environment Agency, Dungannon Town Centre Forum, businesses etc.

ARMAGH CITY REINVIGORATION

This intervention focuses on the need to significantly invest in MSW physical and digital infrastructure, with targeted investment in tourism hubs, to improve the region's competitiveness, increasing market share and growing GVA.

The City of Armagh is set within a picturesque landscape of drumlins, characteristic of county Armagh. Armagh is Ireland's oldest city, with evidence of human settlement dating back 6,500 years. In early history, Navan Fort, on the west of the City, was seat to the kings of Ulster. Arguably, Armagh's defining moment occurred when St. Patrick arrived in 445 AD, establishing a principal church on a hilltop.

Due to the importance of place, Armagh became an academic centre with educational institutions including the Public Library in 1771, the Armagh Observatory in 1790 and much later the Planetarium in 1968.

For these reasons, Armagh City is recognised as one of the key tourism hubs in Northern Ireland, and a Tier 1 priority in the Council's Tourism Strategy 2017-2022. With a wealth of heritage buildings, two magnificent cathedrals, museums and libraries, an observatory and planetarium and beautiful green spaces, there is much to admire about this ancient city.

Armagh has previously benefited from investment in public realm schemes and a number of heritage protection and preservation projects, including the current Townscape Heritage programme. Recent investments in the Southern Regional College and Market Place Theatre & Arts Centre provides state of the art facilities which will boost the arts, educational and evening economy sectors.

Much work remains to be done to maximise the tourism potential of Armagh City as a result of a growing tourism economy in Northern Ireland, and there is much economic benefit that can be derived. The time is right to invest in projects of scale in order to provide more coherent and welcoming tourism destinations for visitors leading to further investment by the private sector and a growth in GVA from a relatively low base.

This project centres on the reinvigoration of Armagh City through a number of interventions including investment in new digital technologies as well as enabling infrastructure. Cognisance will be taken of complementary interventions proposed for inclusion in the Mid South West Region Growth Deal including the 'Transforming our High Streets' proposal, delivery of the A28 Armagh East Link and the development of the Armagh Gaol.

BACKGROUND

The MSW Strategy clearly articulates the challenges faced by the MSW region in terms of a declining share of overnight visitors to NI; though the converse to that is tourism to NI had increased significantly between 2013 and 2018 so the market to Northern Ireland does exist. Northern Ireland has experienced significantly less growth in GVA than the Republic of Ireland. A key part of Tourism NI's strategy to overcome this is to grow tourism in the regions across Northern Ireland. Armagh has been identified by Tourism NI as a City with significant growth potential. Attracting a greater share of tourism to NI is about providing attractive, inspiring, safe, welcoming, interesting, authentic places to visit, stay and enjoy. The core of that is in Armagh – it is now about shaping and honing that offer to become a viable longer term proposition.

As per above, there has been significant investment in the attractions, hotel and wider accommodation product in other regions in Northern Ireland. Similar levels of investment intervention in MSW have not taken place or not to the same degree with private sector investment more prevalent in larger urban areas compared with the MSW region.

Armagh City is also off the key tourism route in Ireland which tends to focus on the coast, which has made attracting visitors inland more difficult.

THE OPPORTUNITY

The opportunity exists to focus investment in Armagh City through a series of direct interventions and joint working with the private sector. These interventions will act as a pump-prime and a catalyst to leverage additional investment from the private sector and other stakeholders across health, leisure, hospitality and the evening economy sectors all of which will be complemented by an animation programme to draw visitors to the city. This integrated programme of investment will demonstrate the regional significance of Armagh City as a destination for both visitors and its citizens and will be fundamental to its future vibrancy and longer term sustainability.

THE VISION

The Armagh Masterplan sets out the following vision;

“The historic City of Armagh will flourish as a lively and attractive place in which to live, work and visit. Known far and wide as the cultural and religious capital of the island, the city's cherished buildings, streets and spaces will provide the fine backdrop to a forward-thinking European destination. Excellent amenities for residents, businesses and visitors, strengthened by improved environment and connectivity will underpin the success of a creative, friendly and people orientated City Centre.”

In more recent times the Armagh City, Banbridge and Craigavon Borough Council Tourism Strategy articulated the following vision:

“to be a market leading cultural tourism destination in Ireland by 2022”.

WHAT WE ARE GOING TO DO

We are going to develop and deliver a series of interventions, including through private sector partnerships, to reinvigorate Armagh City as a destination for visitors and residents to enjoy, and as a place for businesses to invest in.

Some of the key interventions include:

- Investment in the city's vacant building stock to create quality accommodation in line with other MSW pillars and priorities;
- Undertake restoration works at the majestic Mall, a fabulous green space located right in the heart of the city;
- Improve navigation and orientation in the city through investment in welcome, signage and digital infrastructures and in the creation of interesting linkages between places of leisure, living, recreation and working;
- Implement a city wide innovate lighting scheme which will literally shine a light on the city's beautiful streetscapes, landmark buildings and spaces many of which are Listed to illuminate the city's Conservation Area and enhance the most surprising and delightful of views;
- Implement the city cycling strategy to encourage active travel by providing sustainable means of connecting neighbourhoods, moving residents and visitors across the city and beyond to the Greenways on the outskirts of the urban area;
- Implement a pedestrianisation scheme in Market Street to create a safe and welcome environment for all, opening up traditional alleyways thus enhancing visitor flows;
- Invest in key heritage buildings across the city in order to attract new health, recreation and business tenants;
- Initiatives which tell the story of the City and move people across the City, this could include a reimagined museum offering and evening economy initiatives;
- Infrastructure projects including, for example, a Coach Park for Armagh and improved car parking as well as opportunities for Park & Share provision; and
- Investment in the Navan Centre, working alongside Historic Environment Division to create an attractive complementary visitor proposition for the city.

Bringing forward the A28 Armagh East Link will alleviate traffic congestion and pollution greatly enhancing the impact of the interventions outlined above.

CONCLUSION

Armagh is Ireland's oldest City, with a unique history and heritage that has been acknowledged by Tourism Northern Ireland and Tourism Ireland as a place of significance with considerable tourism potential.

However, from a tourism perspective there are infrastructure challenges and significant investment is required to fully realise the City's potential and its ability to

compete on an international stage as a tourism destination. Investment on the scale required will give the private sector confidence to invest in the City and ultimately have an enduring impact on GVA.

CUILCAGH LAKELANDS GEOPARK

This proposition is targeted at MSW RES Intervention Pillar “Building a High Performing Tourist Economy – Cross-Border Tourism Product Development” and is intended to enhance the visitor experience and the carrying capacity of Geopark sites, building on current rising levels of demand for natural resource tourism and access to outdoor recreation and the opportunities presented through Tourism NI’s (TNI) *Embrace the Giant Spirit* and Failte Ireland’s *Hidden Heartlands*.

Sustainable tourism is at the heart of this proposal; alongside the undoubted potential economic benefits and returns of increasing the number of visitors, their dwell time and their dispersal across the area. All component parts of this intervention have core values of environmental sustainability and adding social value through enhancing quality of life and wellbeing for residents in the Geopark and the wider area.

BACKGROUND

The **Marble Arch Caves UNESCO Global Geopark (MACUGG)**; a cross-border designation that recognises the quality of the geomorphology and landscape around the Cuilcagh Mountain Park and the wider surrounding countryside comprises an area of approximately 18,000 hectares. Initially located exclusively in Fermanagh, it became the first area in the UK to be awarded European Geopark status by UNESCO in 2004. In 2008 and following a formal partnership agreement with Cavan County Council, it became the world’s first cross-border Geopark. In 2020, Fermanagh and Omagh District and Cavan County Councils adopted a ten-year development plan for the Geopark. This integrated and ambitious plan embeds UNESCO’s 17 Sustainable Development Goals and details initiatives and actions intended “to nurture and protect our unique heritage so that our place can restore and revitalise those that live and visit here, and can enable connections between people, heritage and nature.” The current Geopark and its sites is attached as Appendix 1.

Following extensive market research and community consultation in 2020, 2021 will see MACUGG deliver against a new brand. This includes a new boundary (Appendix 2), a new name – ***Cuilcagh Lakelands Geopark*** and a new proposition – ***Experiences, It’s in Our Nature***.

The **Marble Arch Caves** is the gateway to exploring the wider Geopark and is a unique visitor attraction in its own right. It is a key driver and contributor to the long-term growth of tourism for the area and for Northern Ireland. As well as servicing visitors for tours of the show cave, it is the hub from which visitors can explore the immediate

surrounding landscape, including the near-by Cuilcagh Boardwalk - known as “the Stairway to Heaven”. It also acts as a visitor information centre and first port of call for visitors to sites across the Geopark.

Marble Arch Caves is located in **Marlbank** (Appendix 3), an area on the northern, lower slopes of Cuilcagh Mountain offering some of the most picturesque and evocative landscapes in the region and, as well as the Cuilcagh Boardwalk and the show-cave, offering a range of outdoor leisure and recreation opportunities including access to Crossmurrin and Killykeegan National Nature Reserves, Hanging Rock, Gortmaconnell, the stunning Claddagh Glen and “rough caving” opportunities. In recent years, Marble Arch Caves has extended its range of visitor experiences to take full advantage of this unique landscape through expanding its offer to include above ground and seasonal experiences.

In 2019, Fermanagh and Omagh District Council commissioned an Economic Appraisal study on the Marble Arch Caves Visitors Centre. It found a dated facility not fit for the increasing number of visitors and not matching the extraordinary quality of the visitor experiences available and recommended the design and build of a new visitor centre as the most economically advantageous course of action. The below ground experience in the show cave is currently being enhanced through TNI funding of £400k to upgrade elements of the lighting and to create a pilot virtual reality experience. Further investment in the cave and AR/VR can turn this into a world class visitor attraction and international draw.

The **CANN** project is a multi-partner, cross-border environment project involving Cuilcagh Mountain and the Boardwalk which aims to improve the condition of protected habitats and to support priority species, ensuring the future of this internationally important habitat and species and create best-practice in sustainable visitor management. Drawing from the knowledge and experience of international experts in sustainable uplands management, a number of recommendations have been made with respect to Cuilcagh and the boardwalk in order to negate adverse environmental impacts and improve the visitor experience. Key amongst these is the redesign of the final stretches of the Boardwalk and the viewing platform

Amongst the key infrastructural developments across the Geopark in-train that inform but are separate to this proposition are, within the Marlbank area, the further development of the Cavan Burren Park and Shannon Pot, a €6.6 million capital and experience development project. Due for completion in 2024, it is anticipated that this project will double the current 24, 000 plus visitors a year to these sites. Development in the Marlbank area is complemented and enhanced by further developments across the Geopark that will increase and diversify the outdoor recreation offer for both visitors and residents. These include the Scarplands Cycle Trail (Ireland’s longest off-road cycle trail, to be launched April 2021), and heritage driven development at **Tully Castle** (2018 – 2022) and an inter-agency masterplan to develop the untapped potential at **Castle Caldwell** (2022 – 2025). The **Sligo Leitrim Northern Counties Greenway** will pass through the Marlbank area and the key settlements of Belcoo and Blacklion before going on to Enniskillen. This will

provide an added dimension to the **Beara-Breifne Way** - Ireland's longest waymarked trail that ends in Blacklion.

In 2020, the Council took on the lease for Killykeegan Nature Reserve and secured £445,000 to upgrade car parking, toilets, interpretation and the visitor amenity; works will be completed by Spring 2021. Killykeegan will provide facilities for visitors to the Cuilcagh Boardwalk and provides an additional reason to visit Marlbank and the Marble Arch Caves. The next phase of development can link Killykeegan to the MAC visitor's centre by an off-road trail and then on to the Cavan Burren Park (Blacklion) by the Smuggler's Way" trail.

Included in this proposition is the realisation of The **Lough Navar Masterplan 2021 – 2024**. Lough Navar Forest is in the scenic, mountainous uplands of West Fermanagh approximately 4 miles from the village of Derrygonnelly and 14 miles from Enniskillen town. It comprises 2,600 hectares of mature working forest with a mixture of coniferous trees, open habitat areas, rock outcrops, lakes and streams. In 2020 FODC commissioned a development plan for Lough Navar to ensure an integrated approach to further development that would allow this site to fully meet its visitor potential. Proposed within this plan are enhanced car parking, visitor amenities, rough/wild camping, enhanced walking trails, cycling and angling facilities. The Lough Navar Development Plan, whilst commissioned by FODC has been informed by a steering group made up of residents, community groups and businesses and its implementation will be managed in a similar way. This will ensure that benefits to communities and to businesses continue to be central to the thinking for this project.

The **Ballyshannon – Belleek Greenway** is, once again gaining traction; a partnership project between FODC, Donegal County Council and Waterways Ireland, this €4Million project will join to the North West Greenway and provide a sustainable transport and leisure cycling/walking opportunity linking the North of the Geopark and the settlement of Belleek to the Wild Atlantic Way. In 2019, a feasibility study estimated the cost of extending this Greenway to the key Geopark hub of Castle Caldwell at a cost of **£1million**. As well as connecting the Geopark, there is significant potential for this greenway to act as a driver for tourism in its own right; in 2019 Failte Ireland stated "Greenways are one of the biggest success stories of Irish tourism that have brought transformative benefits to local communities" The number of tourists coming to Ireland on walking and cycling holidays has grown exponentially in recent years, from 371,000 in 2012 to 1.8million in 2017. In 2019 46% of all overseas holidaymakers to Ireland engaged in walking and cycling as part of their holiday experience.

THE CHALLENGES

The key challenge facing The Geopark, Marble Arch Caves and the Marlbank area is **growing tourism sustainably to maximise the social and economic benefits** of these key tourism drivers whilst minimising and adverse environmental impacts.

Recent years have seen a high growth in visitor numbers. Between 2015 and 2019, visits to Marble Arch Caves have increased from 57,000 to 72,000 with users of the visitors' centre increasing from 111,000 to 180,000. Use of the Cuilcagh Boardwalk has increased over the same period from 2,500 per annum to 122,000. This growth in numbers has put a strain on the existing infrastructure and has not been without adverse environmental impact and impact on the local community. Cuilcagh and the wider Geopark is a unique landscape. It is vital that visitors are managed to ensure this landscape and its eco-system are not damaged and degraded. In addition to managing the visitor experience at Cuilcagh and Marlbank, expanding and extending the natural resource tourism offer across the Geopark can disperse visitors as well as bring increased visitor numbers and consequent economic benefit to other locales.

THE OPPORTUNITY

To address the challenges, Fermanagh and Omagh District Council is working collaboratively with neighbouring Councils and stakeholders from the private, public and voluntary sectors on three lynchpin solutions/opportunities:

1. The Marlbank Masterplan

Fermanagh and Omagh District Council has a Masterplan for the Marlbank area; a plan that can build on the current growing visitor numbers driven by the Marble Arch Caves and Cuilcagh Boardwalk whilst encouraging "dwell time" in the area bringing associated additional visitor spend and benefit to the villages of Belcoo and Blacklion whilst minimising any adverse environmental impacts. The Masterplan has key infrastructure developments; a new Visitor's Centre for Marble Arch, enhancing the visitor experience in the Show cave; connecting MAC to Killykeegan, Cuilcagh on to the Cavan Burren and enhancing the Boardwalk.

2. Green Connections To The Geopark

Alongside the Marlbank Masterplan, Fermanagh and Omagh District Council and its Geopark partner, Cavan County Council, has an aspiration to raise the connectivity of the Geopark and enhance its "green" connections to neighbouring areas and attractions. In train is the ambitious Sligo – Enniskillen Greenway, passing through the heart of the Geopark and Marlbank. At a more advanced stage of development, The Belleek – Ballyshannon Greenway will connect the north of the Geopark to Donegal and the Wild Atlantic Way. Through this intervention it is proposed to extend this Greenway linking Belleek as a key tourism site to the unique and expansive Geopark site at Castle Caldwell.

3. Opportunities Across The Geopark

Essential for the Geopark to reach its full potential as a world class destination for sustainable outdoor recreation tourism is the dispersal of visitors across the area. This can increase dwell time and the length of stay, bring economic and social benefits to settlements and communities across the Geopark and ensure that the risks of over-tourism at honey pot sites are managed and mitigated. Through the realisation of its development plan, Lough Navar has the potential to significantly enhance the Geopark offer and disperse visitors bringing benefits to businesses and communities in the neighbouring villages of Derrygonnelly, Belleek and Garrison. It will complement the well developed Geopark facilities at Castle Archdale and the nascent development plan for Castle Caldwell.

The time is right for the proposed interventions. 2020 saw a growth in the use of the Geoparks outdoor recreation sites. Despite restrictions on international travel and in a challenging trading environment, Marble Arch Caves tours were fully booked between its reopening in July and the mid-September. The appetite for sustainable tourism and outdoor recreation has grown year on year for twenty years and Covid-19 has accelerated this trend.

The significant year on year growth in visitor footfall to the Marlbank area has brought many benefits but also highlighted the need for an integrated approach to visitor experience development and management. This proposition can enable Marlbank to sustainably manage further growth, ensure that negative environmental impacts are limited and encourage dwell time, bringing benefits to the settlements of Belcoo/Blacklion and wider Fermanagh.

With the current focus on the staycation market and the tourism propositions of TourismNI and Failte Ireland 'Ireland's Hidden Heartland' and 'Embrace the Giant Spirit' now is an ideal time to harness opportunities together with partners to connect people with the outdoors, nature and the stories of this stunning landscape. The key to maximising the potential benefits of the growth in Natural Resource Tourism in the Marlbank area and the broader Geopark is taking an integrated and planned approach underpinned by the three pillars of sustainability and increasing the "green" connectivity.

THE VISION

The vision for this project is simple and achievable; to create a world class visitor destination that benefits businesses, communities and the environment; bringing economic return to the area. A vision is meaningless without values and the values for this, once again, are simple:

- **Sustainable Development;** Development is underpinned by the three pillars of Sustainable Development and by the 17 UNESCO Sustainable Development Goals
- **Universal Accessibility;** whilst not always possible in natural resource sites, all developments will aspire to the principle of universal accessibility.

- **Carbon Neutral and Climate Change:** all developments must aspire to being carbon neutral; no development can have an adverse impact on the natural environment.
- **Community Tourism:** we want to create an infrastructure with year-round use, servicing both the tourist and the “local” and see the benefits of an expanded visitor economy shared with businesses and residents. To borrow from *Ireland’s Hidden Heartlands* “Our brand is centred around rural communities and their lifestyles, as well as the many spaces for adventure and relaxation”. Key to this is management groups, management agreements and steering groups made up of residents, communities and businesses

WHAT WE ARE GOING TO DO

We are going to....create a world class visitor destination through:

- Building a nearly zero energy visitor centre at Marble Arch Caves as a gateway to the Geopark with a new visitor centre
- Link this visitor centre to the significant developments at Killykeegan Nature Reserve and on to the Cavan Burren and, potentially, the Shannon Pot by the “Smugglers Trail”
- Enhance and extend the Boardwalk Experience
- Create a Greenway linking Castle Caldwell to Belleek; providing green infrastructure between two key tourism assets.
- Create a “national park” experience at Lough Navar

Through these interventions we can over 5 years...

- **Create a 5* Tourism NI Visitor Attraction at Marble Arch Caves**
- **Increase Marble Arch Caves tour visitor numbers by 33% to 93k**
- **Sustainably increasing visitors to the Cuilcagh Boardwalk by 60k**
- **Increase visits to the Marble Arch Caves Visitors Centre by 50% to 200k**
- **Increase visitors to Lough Navar by 33% to 75k**
- **Attract 50k visitors a year to the Belleek – Castle Caldwell Greenway**

These are initial SMART targets drawn from the Lough Navar Development Plan and the Economic Appraisal of Marble Arch Caves Visitors’ Centre. The potential for a Greenway to drive growth has not been quantified but with the Waterford Greenway attracting 250,000 users a year, a target of 50,000 is achievable

The goal is an additional 250,000 visitors a year to the Geopark with 10% of these staying overnight. Using £18 Additional Visitor Spend for overnight stays and £18 for day trippers/staycation this gives a potential economic benefit to the area of £5.425million.

This is a multi-faceted, integrated proposal that builds on established success and rising demand. It is a proposition of scale that can change the shape of the area's and the region's tourism offer, driving visits and visitor spend whilst ensuring the three pillars of sustainability are pursued and delivered.

Appendix 1 – MACUGG Map



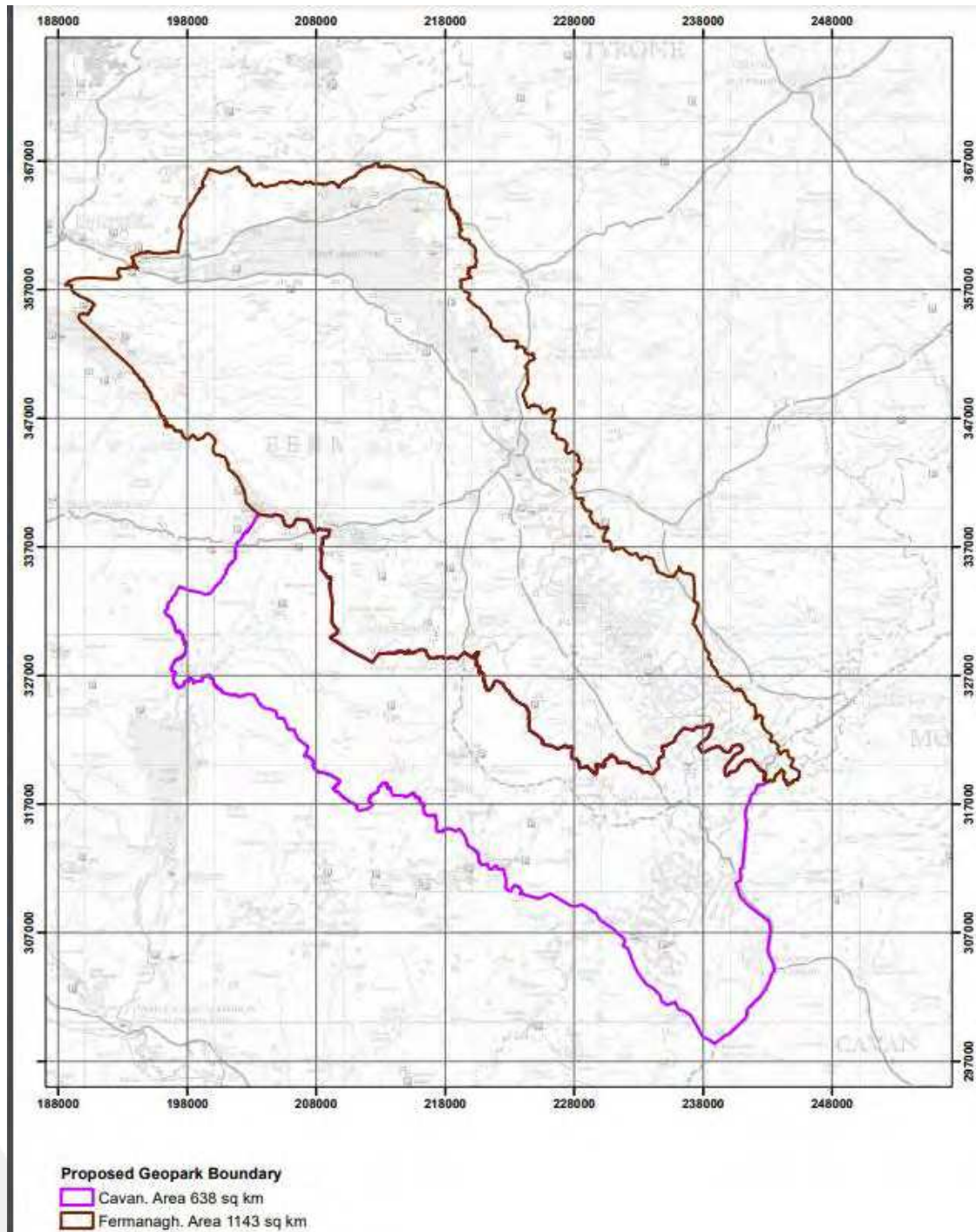
Appendix 2 – Cuilcagh Lakelands Geopark



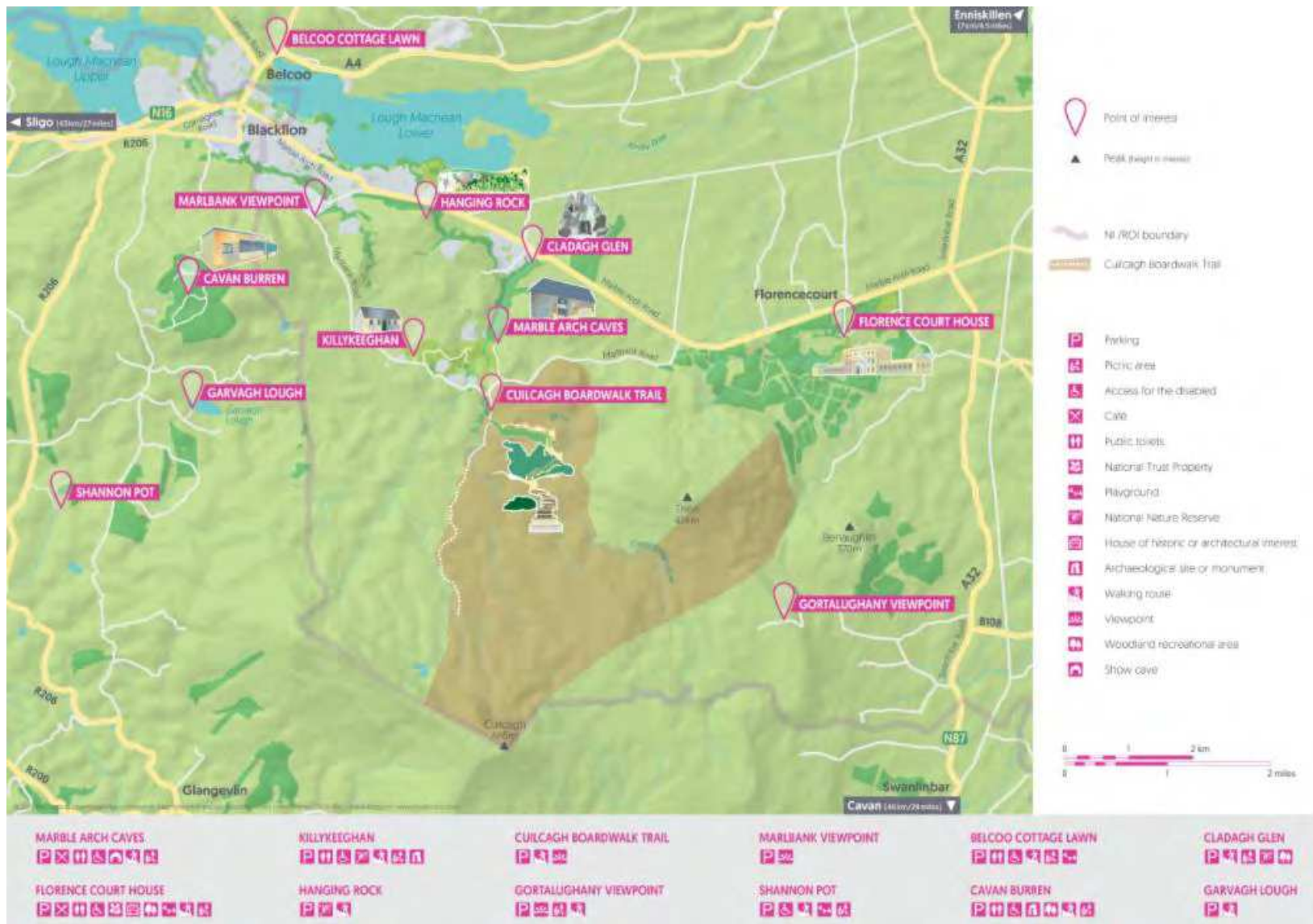
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Appendix 3 - Marlbank



Appendix 4 – Belleek – Castle Caldwell Greenway



REGENERATION OF DENNY SITE, PORTADOWN

Armagh City, Banbridge and Craigavon Borough Council (ABCBC) is the largest Council area outside of Belfast. It has a population of 212,000 across 78,000 households. Economically ABCBC is the location of 8,000 businesses contributing almost £4 billion in GVA to the economy prior to the Covid pandemic.

The purpose of this paper is to outline the strategic opportunities which could be generated from the former Denny site, Portadown. The site has the potential to be a catalytic and flagship investment location for the ABC area attracting investment, jobs and wealth.

BACKGROUND

Armagh City, Banbridge and Craigavon Borough Council as the largest council outside of Belfast has a strong and well established role as an economic driver supporting and contributing to the regional competitiveness of Northern Ireland as a whole. The ABCBC sectoral strengths including Agri-Food, Health and Life Sciences and Advanced Manufacturing are well evidenced by leading global employers in these sectors, as well as the contribution made by the area to the overall economic impact of the sectors at an NI level.

The former Denny site is strategically located close to Portadown town centre between Northway and Obins Street and in close proximity to the Railway station, which in recent years has undergone a capital investment. Since the former processing factory has ceased operation, the site has remained derelict. The council acquired this site in 2016, with a view to stimulating investment, in employment and regeneration in Portadown.

THE OPPORTUNITY

There is a unique opportunity to develop a clear strategic vision for the Denny Site which is aligned to the sectoral strengths of the region and will propel the areas growth trajectory and competitiveness.

THE VISION

As stated above, the ABCBC area has a strong economic base, with key sectoral strengths in Agri-Food, Health and Life Sciences, and Advanced Manufacturing. Looking to the future and as part of the development of Council's Medium Term Recovery Plan there is an opportunity to create an enabling infrastructure to support future markets and advancement of SMEs in these areas. The vision for this site is to be an Innovation / Centre of Excellence supporting the future growth trajectory of companies in ABCBCs sectoral strength areas.

WHAT WE ARE GOING TO DO

In advancing the strategic vision for the Denny Site a number of sectoral concept themes will be developed, which will be progressed to Strategic Outline Business Case and be supported by a technical spatial plan to outline the physical regeneration and development of the site. Collectively this will outline a compelling vision and delivery plan for the site, which will bring investment and growth to the area. There is also potential to acquire adjacent lands and put in place some early enabling infrastructure to support the future vision. ABCBC has committed funds to scoping of potential options for development, and demolition and clearance of this site is progressing.

CONCLUSION

The development of the Denny site as a Centre for Excellence and Innovation aligned to and supporting the ABC areas economic sectoral pillars will propel the competitiveness of local businesses in the market place, regionally and globally. This project is aligned strategically to ABC Councils Medium Term Recovery Plan and longer terms aspirations for the Mid South West Region as a whole.

INDUSTRIAL LANDS AT DESERTCREAT, COOKSTOWN

The acute need for development land has been identified as the single most important development constraint for medium/large sized companies in the Mid Ulster area. The issue continues to stifle economic growth in Mid Ulster and indeed threaten the region's economic recovery from the Covid-19 pandemic.

BACKGROUND

Mid Ulster's economy is private sector driven, boasting the largest business base outside Belfast with over 9,000 VAT registered businesses. The region has higher productivity per head compared to the Northern Ireland average and a GVA of £2.3bn (producing 7.3% of NI's economic output). Our businesses are the most export-intensive, producing 12% of NI's exports. Mid Ulster is appropriately recognised as the centre of manufacturing and engineering in Northern Ireland, where it accounts for 21% of the local economy (approx. 10,740 jobs), compared to 9% in NI. The sector is estimated to deliver c£1.67bn GVA contribution to the local economy and over £710m in local wages, directly and indirectly. The area boasts a world class High Growth Cluster which manufactures more than 40% of the world's mobile crushing and screening equipment.

However, Mid Ulster has consistently been predicted to be one of the hardest hit regions as a result of the pandemic. A report by the Ulster University Economic Policy Centre (UUEPC) identified that the estimated percentage decline in GVA 2020 is -16.3% which is the highest of all the 11 Council areas. This figure exceeds the huge fall in GVA seen in Mid Ulster (-15.6%) at the height of the last recession in 2008-09. Moreover, a study by the Centre for Progressive Policy (CPP) reported that Mid Ulster will endure the greatest economic impact of Covid19 in Northern Ireland. Indeed, the report highlighted Mid Ulster as the only area locally to feature in the top 10 worst-impacted places within the UK's 382 local authority regions. CPP estimates that GVA could temporarily fall by a staggering 45% in the short term, which presents an immense challenge for local companies and jobs.

Despite being a highly entrepreneurial economy, underinvestment in the provision of industrial land is a contributing factor to the fact that too many of our indigenous businesses fail to grow. Restrictions in accessing land significantly impacts on the ability of operating businesses in Mid Ulster's key sectors to expand and deliver investment and job creation in the local area.

Mid Ulster presently has no industrial land available for development. Industrial estates in Granville, Dungannon and Cookstown are at full capacity with no room to expand.

As a consequence, the area has lost out on significant investment and businesses have been forced to look at alternative sites outside the district which is totally unacceptable.

Indeed, the lack of supply of industrial land has pushed prices up to £125k for a one acre serviced site in Dungannon (the price of a comparable serviced site in Craigavon owned by Invest NI is in the region of £80k). In recognition of the shortage of economic development land in Dungannon an additional interim supply has been identified at Dungannon and Granville within the Council's Local Development Plan 2030 (Draft Plan Strategy).

It is the view of local enterprise agencies that the turnover of tenants moving out of their property should be higher, however, one of the problems facing growing businesses in the Dungannon area is the availability of industrial zoned land or "move on space" to buy. Consequently, start-up businesses are not expanding out of enterprise centres / business parks into their own built premises.

There is a sound policy basis for the proposal, at local and regional level, including Council's Community Plan, Local Development Plan and Economic Development Strategy. The Council's draft Local Development Plan Strategy aims to facilitate the creation of at least 8,500 new jobs by 2030, which will only be achieved through the provision of at least 170 hectares of economic development land economic land.

In addition, the project supports Invest NI's Strategy, which identifies the need to build on strengths and core competencies in Northern Ireland's main exporting sectors and drive sectoral development in advanced manufacturing, materials, and engineering, agri-food, digital and creative technologies, construction and materials handling.

According to Invest NI figures for land holding and site sales, Mid Ulster had the highest number of site sales over the period 2009-19 as identified in Table 1 on the next page: -

	Landholding (Acres) as at 31/03/20	Land Availability (Acres) at 31/03/20	Number of site sales 2009/2019 to INI Clients	Number of acres sold 2009/2019 to INI Clients
Antrim & Newtownabbey	392	93	6	18
Ards & Down	92	21	2	3
Armagh City, Banbridge & Craigavon	377	143	15	34
Belfast City	213	30	3	0
Causeway Coasts & Glen	144	63	3	4
Derry City & Strabane	486	101	13	17
Fermanagh & Omagh	170	34	5	11

Lisburn & Castlereagh City	247	0	6	15
Mid & East Antrim	229	25	9	13
Mid Ulster	202	3*	20 (21%)	63 (31%)
Newry, Mourne & Down	278	40	13	25
TOTAL	2830	553	95	203

* comprises 1 x 2 acres' site at Creagh Industrial Estate which is in the process of being sold to an Invest NI client company. The remaining 1 acre includes land remnants which are not developable. Therefore, Invest NI have exhausted their supply of industrial land in Mid Ulster.

THE OPPORTUNITY

There is a golden opportunity to secure a significant landholding of approximately 180 acres for industrial / economic use at Desertcreat, outside Cookstown, which is currently in public ownership. The purchase of these surplus lands would be critical in addressing industrial land constraints and helping indigenous businesses to grow and deliver investment and job creation in the local area.

The acquisition of these lands would facilitate the growth of our world class advanced manufacturing, materials handling and engineering sector; and complement the proposed South West College Innovation and Skills Academy Centre which will focus on driving innovation and securing a future talent pipeline for this critical sector.

The supply of affordable and suitable industrial land in Mid Ulster will increase its capacity and potential to attract external investment in other key growth sectors.

THE VISION

To create the conditions for economic growth and prosperity through the provision of suitable and affordable serviced industrial lands in Mid Ulster.

WHAT WE ARE GOING TO DO

We intend to acquire lands at Desertcreat, outside Cookstown for industrial use. This will enable Council to develop the site to deliver enabling works / infrastructure in the form of road access and utilities leaving the site in a state of readiness for lease or purchase by businesses.

CONCLUSION

The development of serviced land will help address the acute shortage of available industrial land in the district and play an integral role in attracting new firms into the area and retaining the high concentration of indigenously grown companies, many of which are now multi-national operations, that have reported to Council that there are extremely limited opportunities to increase their scale of production which is hampering their ability to fulfil orders and compete in new global markets. However, similar to Invest NI, Council understands that development of serviced sites represents a long-term strategic approach, which recognises the need to provide the appropriate infrastructure in the longer term. This project is of immense importance, not only to Mid Ulster but to the Northern Ireland economy. The provision of additional industrial lands in Mid Ulster will act as an 'enabler' to unlock increased levels of private sector investment and productivity in the most enterprising and entrepreneurial region of NI.

ENABLING INFRASTRUCTURE

‘PHYSICAL CONNECTIVITY - ROADS’

The purpose of this paper is to set out the case for much needed investment into Mid South West (MSW) Region connectivity networks to enable greater access to regional, national and global linkages (roads, rail, seaports and airports) along with high quality connections to facilitate faster movement of products to market, and strengthen our competitive advantage in becoming more progressive in global, complex and strategic supply chain ecosystems.

MSW Key Information and Data

- **Mid South West Region** (a collaboration between Armagh City, Banbridge and Craigavon Borough Council, Fermanagh and Omagh District Council and Mid Ulster District Council) has a global vision to supercharge the economic growth of our region. The economy is driven by a thriving private sector that includes many world-leading companies which are major innovators and global exporters;
- The MSW region makes up almost **half** of Northern Ireland’s **land mass**;
- MSW’s geographical position is hugely significant as it **spans five of the six** counties in Northern Ireland: Down, Armagh, Tyrone, Fermanagh and Derry/Londonderry, and has the longest proportion of the Ireland/Northern Ireland Border Corridor.
- Geography and proximity to the border means that MSW is contiguous to counties Donegal, Sligo, Leitrim, Cavan and Monaghan in the Republic of Ireland. The region forms a **central part of the North/South border corridor** with much higher levels of cross-border trade, commuting, access to services (including health and education) and recreational use than would be found in other parts of the island of Ireland.
- MSW represents **one quarter of NI population** - combined population of over 470,000 people and a working age population of 300,000 which is forecast to grow.

- MSW created its **own sophisticated and unique ecosystem** for business to thrive, and is home to a third of Northern Ireland businesses and **214,000** workplace-based jobs;
- Generated **£7.7Billion** GVA in 2018 (1/5 of the overall NI Economy). This figure does not consider contribution from **supply chains**;
- MSW is home to many world leading businesses and as such is a globalised, outward and forward looking region which accounts for **27% of NI exports**;
- **Leading the Way** in: Manufacturing, Engineering, Agri-Food, Health and Life Sciences, Tourism and Construction. Our regional specialisms are even more pronounced when compared to the UK average;

BACKGROUND

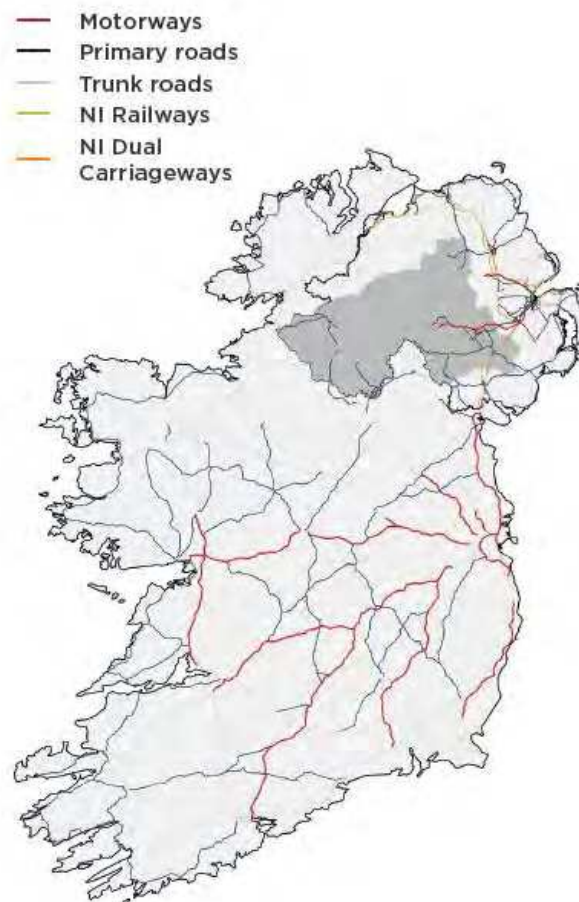
The economic geography of the MSW region is shaped by the presence of Northern Ireland strategic corridor routes - the M1, A1 Dublin/Belfast, A4 Ballygawley/Border, A5 (N2) Derry/Dublin, A6 Derry/Belfast and A29 Coleraine/Armagh - all run through the region. MSW's positioning is at the centre of important wider connections and markets, particularly at this critical time when the UK has recently departed from the EU.

With diverse people and economically competitive businesses, our region has grown faster than all others in Northern Ireland (NI). In NI terms, the region accounts for over a quarter of its population, almost half of its land mass, and has the longest proportion of the Ireland/Northern Ireland Border Corridor. Many of NI's world leading companies were born here and it continues to be home to headquarters of their globalised operations.

As home to a third of NI businesses, MSW industry has been forced to operate with substandard infrastructure networks and connectivity for decades, with consequent constraints on the efficiency of their operations and associated productivity. Despite significant historical underinvestment in enabling infrastructure, communication networks including broadband and mobile coverage, and utilities such as wastewater and sewerage systems, our extraordinary people have created a sophisticated and unique ecosystem for businesses to thrive. Entrepreneurial spirit is a distinctive characteristic of the region. Our business mentality, reputation and dynamism has given us a critical edge over other regions demonstrated by the export of more goods and services than all other areas of NI.

Whilst MSW accounts for half of the land mass in NI, data shows that motorway and A roads account for only 8% of our network. The map below provides a stark illustration of this. It shows the coverage of motorways, dual carriageways and primary roads on the island of Ireland, with an evident gap in coverage out to the West:

- There is almost no dual carriageway in Fermanagh and Omagh District Council area (0.6km);
- Dungannon and Cookstown have no bypass networks and as a consequence these major towns in our region, and the roads that surround them are regularly congested;
- Need for bypass networks in Armagh City and Enniskillen, through the East Link in Armagh and the Southern Relief Road in Enniskillen.



We are told that in order to address economic growth and competitiveness, or to embed new ways of working and technologies, that the enabling infrastructure must be fit for purpose. MSW is significantly disadvantaged and challenged in this way as can be seen on the map shown on the previous page.

MSW Regional Economic Strategy identifies significant challenges to be addressed – amongst them: productivity levels which are almost 10% lower than the rest of NI, and 15% lower than the UK average; providing more and better jobs and the ability to keep our economy open to all levels of international talent in the face of a weaker outlook for population growth, and changing migration policy. The substantial infrastructure deficit in the MSW region is identified throughout the strategy. This

ranks highly as a key area in need of substantial investment, and if addressed, could catalyse significant GVA and productivity growth.

THE CONNECTIVITY OPPORTUNITY

As the 'economic engine' of NI, and with our evidenced strengths in Manufacturing, Engineering, Agri-Food, Health and Life Sciences, Tourism and Construction, MSW in a prime position to drive wealth creation, exports and innovation. The critical mass of our global economic activity to date has been achieved in spite of underinvestment in basic economic infrastructure and connectivity, demonstrating the resilience and determination of our indigenous businesses in the region to succeed.

Facilitating transport, greater access to road, rail, sea ports and airports, advanced cross-border connectivity, progressive digital communication capability, access to industrial land, energy and water are considered by MSW as the bedrock to our prosperity and well-being for our regional economy.

In order to address regional imbalances and achieve levelling up of NI and UK economies, MSW believe it is essential in the first instance, to install the basic enabling infrastructure that will undergird the structure of our economy and take advantage of our distinctive positioning along the north/south and east/west border corridors. In the absence of redressing the fundamental economic problem (infrastructure gap), increasing productivity and achieving virtuous economic effects will only remain a distant possibility for the MSW region. Based on the financial contribution that the MSW Region makes to the NI and UK Economies, this is an unacceptable position.

To achieve geographical cohesion across the border regions, MSW connectivity must be prioritised. Greater access to regional, national and global linkages are essential. Strengthening the region's strategic and unique geographic location through enhanced infrastructure and digital connectivity will advance north/south and east/west cross border interactions and global transactions. Future investment in our cross border connectivity will significantly influence the functioning of trade, access to labour markets, business productivity and competitiveness. Such investment is essential and will ultimately lead to improvements in NI and UK economic output and the geographical distribution of trade.

The following basic enabling infrastructure must be prioritised for MSW by NI and UK governments to realise inclusive growth ambitions and achieve a regionally balanced economy (level playing field):

- **Physical Infrastructure** – new road networks, rail to the West;
- **Connectivity** – improved cross border connections, greater access to rail, seaports and air ports, increased digital connectivity, technologies and capability to facilitate 'Freeport' economic zone, broadband and mobile coverage;
- **Access to Industrial Land;**

- **Investment in Utilities** – electricity, sewerage and wastewater systems;
- **Regeneration and Place Shaping of our Towns and High Streets.**

WHAT WE ARE GOING TO DO – ROAD NETWORKS

The following road networks have been prioritised for development and delivery through the MSW Growth Deal as a first step in redressing the fundamental connectivity gap in the region:

- **A4 Southern Relief Road, Enniskillen** – At a regional level completion of the A5 Western Transport Corridor is critical to connectivity within MSW. In addition, it will provide a transport link along the A4 from the Dublin Road to the Sligo Road. Other benefits include facilitation of a more efficient movement of traffic in and around Enniskillen which will relieve congestion, reduction in noise and air pollution in Enniskillen town.
- **A28 Armagh East Link** – This road network will improve road safety and journey time for both strategic and local traffic in and around the historic city centre, so relieving congestion and improving the environment. The scheme will also improve the road network between the north and south of the Province and relieve congestion on a key route to the east of the city, facilitating future development in this area.
- **A29 Cookstown Bypass** – This bypass will relieve traffic congestion, remove strategic traffic from the town centre and surrounding road networks and increase road safety for all. The current adverse effects of severance, noise, air quality and the impact on townscape will be reduced. The new network will improve the quality of life for users of the town centre and attract more visitors and shoppers to the historic wide street.

In addition to the above stated networks, the following roads have been prioritised for progression through the key DFI Roads development stages:

- A3 Armagh North and West Link;
- A29 Dungannon Bypass;
- A32 Cortnamuck & Kilgortnaleague.

CONCLUSION

Mid South West Regional Economic Strategy affirms that connectivity drives the regional economy. The Strategy recognises that the single largest impediment to MSW Region's economic growth and prosperity is the absence of the basic economic infrastructure that other regions of the UK take for granted. Our Region's

ability to move people and goods is vital to the success of our businesses and the growth of our economy.

If the UK and NI Governments are serious about its commitment to levelling up and addressing regional imbalances, then they can no longer continue to direct investment in such a way that only serves to exacerbate these imbalances and inequalities. Mid South West Regional Economic Strategy confirms the need and evidence base for such investment. As a first step in addressing levelling up of our regional economy, MSW request that both the UK and NI governments prioritise investment into the regions physical connectivity and in particular: A4 Enniskillen Southern Bypass, A28 Armagh East Link, A29 Cookstown Bypass, A3 Armagh North and West Link, A29 Dungannon Bypass and A32 Cornamuck & Kilgortnaleague.

RURAL BROADBAND

NOTE: Rural broadband provision to be kept under review to ensure left behind areas from Project Stratum have an identified solution (approximately 3000 properties).

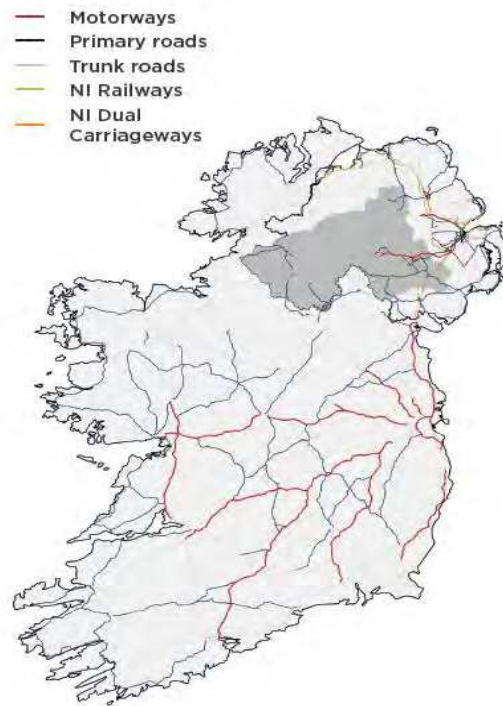
INDUSTRIAL LANDS AT OMAGH

The fact that there are currently 0 acres of available, serviced sites/land for industrial development in Omagh, the largest centre of population in the Fermanagh and Omagh district and one of the three largest in the Mid South West region, is recognised as a key constraint to local economic growth in the Fermanagh and Omagh district and, consequently, the Mid South West region. All of the existing Invest NI serviced sites in Omagh have been sold/leased. It is essential that this issue is addressed in order to enable the realisation of the Mid South West Vision and the delivery of the levelling up agenda promoting balanced and inclusive regional development and contributing towards addressing historic levels of under-investment in this region.

It should be noted that there are expected to be opportunity sites arising beyond 2025 in Omagh town centre, subject to the completion of the Strule Shared Education Campus. However, these are not suitable sites for the purposes of industrial development and thus are not considered in this paper.

BACKGROUND

Omagh is the largest town in the Fermanagh and Omagh district in terms of population and household numbers. It provides an extensive range of services to the wider region and is a location for significant numbers of businesses and levels of employment. Omagh is strategically located on the Western Economic Corridor that connects Omagh northwards to Derry/Londonderry, eastwards to Belfast and southwards to Dublin. The proposed dualling of the A5 will provide a step change in terms of connectivity (see map on next page), however, the significant economic opportunities and benefits of this major roads investment will be diminished by the lack of availability of industrial land for those companies who may wish to become established in the area or for local companies who wish to expand. As home to a third of NI businesses and, amongst them, many world leading export businesses, MSW industry has been forced to operate with substandard infrastructure networks and connections for decades, with consequent constraints on the efficiency of their operations and associated productivity. Facilitating transport, advanced cross-border connectivity, greater access to road, rail, sea ports and airports, advanced digital communication capability, **access to industrial land**, energy and water are considered by MSW as the bedrock to our prosperity and well-being for the regional economy.



The emerging Local Development Plan for the Fermanagh and Omagh district identifies that take up of industrial land has tended to be greater on zonings where Invest NI has intervened to provide serviced sites which are more attractive to investors because they are closest to the main transport corridors. The delivery of sites on privately owned land is dependent upon the landowner's willingness to sell at a reasonable price. Currently approximately 34 hectares of developable zoned industrial land is currently available in Omagh (ie not affected by flood risk), however, none of this is in Invest NI ownership or is serviced. The draft Plan Strategy anticipates increasing the overall zoned allocation in Omagh to approximately 42 hectares. Fully utilised, this could provide space for 7,000 jobs in Omagh (assuming broad industrial employment densities, no displacement and not including construction 'job years').

Omagh Area Plan – Existing Industry Zonings			
Settlement	Location	Area Zoned (hectares)	Area Remaining Undeveloped (hectares)
Omagh	Strathroy West	12.61	12.61
	Strathroy East	6.20	2.24
	Arvalee	11.28	11.18
	Doogary	19.52	5.95
	Tamlaght Road	3.20	0.17
	Leckpatrick	1.94	1.04
	Gortrush	4.03	0.84
	Drumquin/Derry Road	24.53	12.83
Omagh Total		83.31	46.86*

*Estimated that only 34 Ha remains as developable lands due primarily to flood risk.

The table on the next page sets out Invest NI's land holding and site sales by Council Area. It can be seen that there are 34 acres of land available in the Invest NI landholding in the Fermanagh and Omagh district, however, all of this is located around Enniskillen in County Fermanagh. This is not a sustainable model for local or regional economic growth given the significant population/workforce based around the Omagh area and the limited transport links between both main towns.

Table 1 - Invest NI - Land Holding and Site Sales by Council Area

	Landholding (Acres) as at 31/03/20	Land Availability (Acres) at 31/03/20	Number of site sales 2009/2019 to INI Clients	Number of acres sold 2009/2019 to INI Clients
Antrim & Newtownabbey	392	93	6	18
Ards & Down	92	21	2	3
Armagh City, Banbridge & Craigavon	377	143	15	34
Belfast City	213	30	3	0
Causeway Coasts & Glen	144	63	3	4
Derry City & Strabane	486	101	13	17
Fermanagh & Omagh	170	*34	5	11
Lisburn & Castlereagh City	247	0	6	15
Mid & East Antrim	229	25	9	13
Mid Ulster	202	3	20	63
Newry, Mourne & Down	278	40	13	25
TOTAL	2830	553	95	203

*** all available land located at Enniskillen.**

The Fermanagh and Omagh economy is entrepreneurial in nature with almost 11% of NI's VAT registered businesses compared to 6% of the NI population. It is home to many significant employers including Terex, Kerry Foods, Naturelle alongside a significant SME and micro business base with huge potential for growth. The manufacturing sector (which includes advanced engineering) accounts for 12% of total employment in the FODC area. The construction sector accounts for 8% and agri-food accounts for 10%, all of which depend on availability of industrial land.

Engagement with our local enterprise agencies identifies that the turnover of tenants from their properties should be higher, however, there is a lack of opportunity through the availability of industrial zoned land or "move on space" to buy or lease. This, in turn, limits the availability of space for start-up businesses in our enterprise centres.

Indeed, the business birth rate, 8.8% in 2019, remains below long-term trends, which tend to be closer to 10%.

In addition, the project supports Invest NI's Strategy, which identifies the need to build on strengths and core competencies in Northern Ireland's main exporting sectors and drive sectoral development in advanced manufacturing, materials, and engineering, agri-food, digital and creative technologies, construction and materials handling.

THE OPPORTUNITY

There is currently land zoned in Omagh for industrial development at a number of sites and a commitment through the LDP draft Plan Strategy for the identification of additional zoned lands. Recent investment in the now completed Strathroy Link Road has improved connectivity to zoned lands at Strathroy and there is greater connectivity to a potential site in the Drumnakilly area as a result of a link road from the A5 serving the Omagh Hospital and Primary Care Centre. Both the NI Executive and the Irish Government have committed to the delivery of the A5 strategic roads project. There is an opportunity now to ensure that the area is positioned to fully benefit from this improved connectivity and the associated increased attractiveness this will create for the area as a place to do business, by investing in securing and servicing a significant landholding for industrial / economic use.

Much has also been made of the potential opportunities arising from EU Exit and the arrangements under the NI Protocol to attract business to NI and, again, in order to ensure that the existing imbalance in our economy is not further exacerbated, there is a need to ensure that opportunities exist for such investment to benefit the region as a whole. The availability of accessible and serviced industrial sites at key regional centres and hubs is a key consideration. As noted earlier, the realisation of all the land zoned for industry in Omagh could create space for 7,000 jobs.

The acquisition of suitable lands is also essential to facilitate the growth of our indigenous businesses. It would also mitigate against the significant risk of further loss of our existing business base as evidenced by the recent loss of KES, a high growth, innovative company, from Omagh to the DCSDC area due to the lack of available sites for expansion in the Omagh locality.

THE VISION

To create the conditions for inclusive economic growth through the provision of appropriate serviced industrial lands in Omagh, one of the most significant population and economic centres in the region, which will support the delivery of the MSW RES and capitalise on the opportunity provided by investment through the Growth Deal and in the A5 strategic road network

WHAT WE ARE GOING TO DO

Identify and secure land for industrial development in Omagh with good connectivity links to the proposed A5 dual carriageway route. Deliver site enabling works/infrastructure to develop the site to a state of readiness for lease or purchase by the private sector.

CONCLUSION

In order to address regional imbalances and achieve levelling up of NI and UK economies, it is essential in the first instance, to install the basic infrastructure systems in MSW that will underpin the structure of the economy and take advantage of our distinctive positioning along the north/south and east/west border corridors. In the absence of redressing the fundamental economic problem (infrastructure gap), increasing productivity and achieving virtuous economic effects will only remain a distant possibility for the MSW region. Based on the financial contribution of MSW to the NI, UK, and EU economies, this is an unacceptable position.

This proposal is crucial to the future economic growth of the MSW economy and that of the Fermanagh and Omagh district. The lack of available serviced industrial land at a key strategic location within the region is a crippling barrier to economic growth which must be addressed if our innovative and successful indigenous companies are to have the opportunity to grow and to ensure that we do not continue to lose our local successful companies to areas outside the MSW region, simply because they cannot access local suitable industrial sites.

INDUSTRIAL LAND ON THE A1 ECONOMIC CORRIDOR, BANBRIDGE

The purpose of this paper is to set out the urgent need for the provision of available and serviced economic development land along the A1 Economic Corridor at Banbridge.

There is unmet and strong demand for employment land with direct access off the A1 in Banbridge evidenced by a lack of available and serviced land which is preventing businesses from locating in the region and along this key transport corridor. This is leading to the loss of critical private sector investment along this economic corridor during a pivotal time which is key to the future of the area.

BACKGROUND AND CHALLENGES

The economic output of Armagh City, Banbridge and Craigavon Borough Council is second only to Belfast with over 8,500 vat registered businesses and a GVA (gross value added) of £3.6 billion per annum.

Banbridge sits at a key location on the A1/M1 transport corridor between Belfast and Dublin and is considered an attractive location to live with a strong retail and leisure base. However it is estimated that over 40% of working people living in Banbridge commute out of the area to work.

Attracting new and retaining existing investment is a key challenge for the area and region and the ability to attract investment is constrained from many decades of underinvestment.

There is also significant untapped economic potential. The Local Development Plan Preferred Options Paper (March 2018) for Armagh City, Banbridge and Craigavon Borough Council areas estimated that approximately 12,233 new jobs are needed to match the projected increase in the Borough's working age population by 2030. This need for 12,233 new jobs is estimated as equating to 245 ha of economic development lands at a density of 50 jobs per hectare.

For Banbridge this equates to the need for 59 hectares across the proposed plan period under the preferred option, or up to 82 hectares under the alternative options. At present there is only 49 hectares of allocated land available within Banbridge, of which the majority is not currently available for development due to landowners being either unwilling to develop or dispose of the land at a market rate. Further, even if this unavailable land was to come onto the market, the undeveloped and

most accessible portion of it comprises green field land which is not serviced and would require significant investment to make it attractive and viable for potential occupiers.

In keeping with the Regional Development Strategy, the Preferred Options Paper concludes there is a need to assess the 'fitness for purpose' including environmental implications of existing employment land provision, location and availability. However it is clear from market supply research that there is very limited land fit for purpose in Banbridge. This lack of availability of suitable sites is already causing a loss of opportunity and investment with a number of businesses who wish to locate along the A1 around Banbridge being forced to look elsewhere.

THE OPPORTUNITY

The provision of serviced economic development land in Banbridge has a number of major opportunities for growth which make it a prime location for investment prioritisation.

Banbridge's location within Northern Ireland on the Belfast to Dublin Economic Corridor means it is best placed to deliver the economic land needed for investment looking to capitalise on the benefits of the economic corridor and also on the dual market access opportunities brought about by the UK's exit from the European Union.

The A1 corridor provides excellent access for the sale of goods and services to Great Britain and the European Union, two of the world's largest markets, and its location enables companies to easily capitalise on NI's position as the only place where businesses can operate free from customs declarations, rules of origin certificates and non-tariff barriers on the sale of goods to both GB and the EU.

This is a unique proposition for manufacturers based in Northern Ireland and Banbridge's location provides for those seeking a pivotal location from which to service GB and EU markets, recalibrate supply chains, or design, develop and sell products across key industries such as life & health sciences, aerospace, electronics & machinery, chemicals, consumer and agri-food goods. It is critical that available and development ready land is available in this highly accessible location to capitalise on the opportunity.

A significant quantum of the unallocated need for economic development land in Banbridge can be provided by reallocating undeveloped land situated off existing A1 junctions in Banbridge. The level of economic benefits which will be generated from making this land available will be significant and will help achieve many targets linked to jobs, enterprise growth and economic diversification. Improving the area will therefore help achieve many of the objectives associated with increasing the economic competitiveness of the MSW Region.

Developing the right environment to stimulate private sector investment along the A1 Economic Corridor will be key to the future of the region

THE NEW VISION

Our vision is to supply the land needed to capture and enable growth along the key strategic A1 Economic Corridor and to provide for opportunities arising out of Northern Ireland's dual market access. This will allow the area capture opportunities for growth for the benefit of local people, business and the environment.

This will be achieved through the following aims:

1. **Providing highly accessible sites** - Land brought forward will be located beside and visible from the A1 and have direct access to it via an existing grade separated junction.
2. **Reducing uncertainty and development risk** - Land will be taken through the Local Development Plan process and allocated or outline planning permission will be sought for a range of parameters to reduce risk and uncertainty for occupiers or developers.
3. **Serviced and ready to develop** - Land will be brought to a standard which will encourage occupation through the provision of infrastructure including utility provision, key service and estate roads, branding and environmental mitigations and enhancements.
4. **Holistic regeneration** - ensuring that new economic development land is delivered in an economic, as well as physical sense, so that the business community is strengthened in addition to ensuring a high quality physical environment. Our vision therefore encompasses economic development as well as physical improvement.
5. **Positioning the supply to take advantage of real opportunities for economic growth** - interventions will be aware of the needs, requirements and environments of recognised growth sectors.
6. **Developing a programme for improvement rather than a shopping list of projects** - interventions will be interlinked and complement one another as opposed to a list of disparate and unconnected activities.
7. **Ensuring that new economic development land along the A1 plays a key role in increasing the competitiveness of the MSW Region and Northern Ireland economy** – interventions will be at a level which will ensure that they can play a vital part in the economic growth of the MSW Region as well as the wider Northern Ireland economy. Our vision therefore understands that interventions are not just important for ACBCBC.

WHAT WE ARE GOING TO DO

The proposed interventions will acquire, de-risk and bring forward serviced economic development land and/or sites with excellent connectivity to the A1 Economic Corridor

We propose that a number of interventions will be required to lever in private sector investment including the following:

1. **Assembling a large quantum of highly accessible land to help supply the identified economic development land requirement over the Local Development Plan period.**
2. **Obtaining an allocation for the Land in the Local Development Plan in order to minimise the planning risk for potential occupiers or developers.** Alternatively if the Local Development Plan is delayed, seeking an outline planning permission for parameters that reduce risk for potential developers or occupiers.
3. **Providing utilities and infrastructure to help viability and encourage occupation of the site.** Including energy, water, environmental mitigations and enhancements, internet, key estate roads and other key services.
4. **Branding and marketing.** Develop and deliver a high quality brand for the area in order to ensure it has a strong profile and is recognised as an important economic area in order to make it easier to market to potential occupiers. This would include comprehensive signage at gateways and corridors within the area.
5. **Public transport provision and pedestrian and cycle routes.** Projects to facilitate green travel routes (cycling/ walking routes) and increase connectivity to encourage recreation and sustainable movement within the area, into Banbridge Town Centre and to the wider transport network.

CONCLUSION

In order to realise the potential for growth, and achieve levelling up of the NI and UK economies, it is essential that a supply of available and developable economic land is provided in the most accessible and desirable areas of our region. These available sites need to be supported by infrastructure that enables modern business to occupy them.

There is currently a very large undersupply over the emerging plan period of available and developable economic development land along the A1 Economic

Corridor. This can be addressed through investment which would deliver serviced and highly accessible land in Banbridge.

Provision of this land will address regional imbalances and achieve levelling up of NI and UK economies. It is clear that a failure to provide economic areas that enable easy decisions to be made on the optimum location to locate and reflect the necessary brand qualities and place requirements that today's businesses expect will result in lost investment and the relocation of existing businesses to other regions and countries.

Providing available and serviced land to stimulate private sector investment along this critical economic corridor at this pivotal time is key to the future of the area. The public sector alone will not be able to create the levels of change that are required. Because of the scale of demonstrated need for land in the Banbridge area, the level of economic benefits which will be generated from making this available and development viable will be significant and will help achieve many targets linked to jobs, enterprise growth and economic diversification. Improving the area will therefore help achieve many of the objectives associated with increasing the economic competitiveness of the MSW Region.

TRANSFORMATION OF M12 CARN AND SEAGOE INDUSTRIAL ZONE

The purpose of this paper is to set out the case for much needed investment into one of the region's largest industrial zones to capitalise upon and better reflect the area's existing and potential significant economic contribution. Transformative, place shaping interventions will stimulate private sector investment to bring about further economic and physical improvements and ultimately the utilisation of highly accessible economic development land within the region.

BACKGROUND

The economic output of Armagh City, Banbridge and Craigavon Borough Council is second only to Belfast with over 8,500 vat registered businesses and a GVA (gross value added) of £3.6 billion per annum.

The business base within the economic area of Carn and Seagoe is diverse and contains a large number of major Northern Ireland businesses, including Northern Ireland's largest employer Moy Park. The area contributes £2.7 billion of the GVA of the Borough and approximately 12,000 people are employed by over 160 businesses including global brands in life sciences, agri-food and advanced manufacturing. There are also extensive supply chains supporting these sectors and a dynamic transport and logistics sector which allow businesses to connect on global platforms.

Attracting new and retaining existing investment is however a key challenge for the area and region. Industrial areas have suffered from many decades of underinvestment and this is particularly evident in Carn and Seagoe. Issues such as the quality of road, energy and telecommunications infrastructure, legibility, environment and limited public transport are creating difficulties for the operation of many businesses and limiting the ability to attract new investment.

There is also significant untapped economic potential. Within Carn and Seagoe there exists a large bank of available economic development land which could be utilised to deliver significant economic growth. This land is allocated in adopted planning policy, benefits from direct access to the motorway network and is in a key position beside the Belfast to Dublin railway line.

OPPORTUNITY

Carn and Seagoe has a number of major opportunities for growth which make it a prime location for investment prioritisation including:

- **Uniqueness:** The Carn and Seagoe Area is not just another industrial area in Northern Ireland. It has a number of positive attributes that make it an important asset for the MSW Region and Northern Ireland. These assets include, its central geographical location within Northern Ireland, its direct access to the Motorway Network via the M12 and M1, its large land bank of undeveloped allocated land and its location between two major stations on the Belfast to Dublin Railway Line.
- **Size and scale:** Carn and Seagoe is one of the largest commercial areas in the MSW Region with over 12,000 people currently working within its boundaries. Its scale means Carn and Seagoe is not just another industrial estate in Northern Ireland and any improvements to it in terms of physical and economic development would benefit a large number of businesses. Carn and Seagoe is also home to some of Northern Ireland's largest and most important employers including Moy Park and Almac. In order to ensure that these types of companies remain (and grow) within Northern Ireland it is important for the Carn and Seagoe area to be as competitive as possible and for its offer to companies to be as strong as it can possibly be.
- **Expansion Ready:** The level of vacant and underutilised land in parts of the Carn and Seagoe area presents an opportunity for significant expansion and investment. The existing major transport infrastructure in the area, combined with the large catchment workforce and the strength of existing businesses means the area is well positioned to accommodate this growth if investment is made.
- **Strong Growth Sectors:** There is also recognised growth in sectors that are looking for the types of location and premises that Carn and Seagoe can provide. Predicted growth sectors associated with the life sciences, agri-food and advanced manufacturing over the next decade provide huge opportunities for the region if improvements can be made that will ensure the area's offer is right.

Because of the scale of Carn and Seagoe, the level of economic benefits which will be generated from improving the area will be significant and will help achieve many targets linked to jobs, enterprise growth, economic diversification and brownfield land. Improving the area will therefore help achieve many of the objectives associated with increasing the economic competitiveness of the MSW Region.

Developing the right environment to stimulate private sector investment in Carn and Seagoe will be key to the future of the area. The public sector alone will not be able to create (and finance) the levels of change that are required.

A key opportunity to bring about a significant step change in the environment, and set a precedent for further investment, is to significantly improve the gateway M12

route which passes through the economic heart of Carn and Seagoe area and provides primary access to it.

The current route does not reflect the significance of the area, and appears as an 'anonymous' stretch of dual carriageway lined on either side by vegetation and trees of variable maturity and quality. There is currently no sense of place or legibility. A step change in the quality of this gateway environment along the M12, and to the vehicle, pedestrian and cycle environment leading from it and through the area, would provide major benefits to the environment and signify the economic importance of the area as a centre of excellence for entrepreneurship, innovation and investment and thereby increase the desire to locate within it.

THE VISION

Our vision for the future of the Carn and Seagoe area is for it to become a driver of success for the region, ensuring the area captures opportunities for growth for the benefit of local people, business and the environment.

This will be achieved through the following aims:

- **Developing the right environment to stimulate private sector investment in Carn and Seagoe** - interventions related to physical regeneration will recognise that stimulating investors and developers from the private sector will be key to the future of the area.
- **Holistic regeneration** - ensuring that Carn and Seagoe area is revitalised in an economic, as well as physical sense, so that the business community is strengthened in addition to ensuring a higher quality physical environment. Our vision therefore encompasses economic development as well as physical improvement.
- **Positioning Carn and Seagoe to take advantage of real opportunities for economic growth** - interventions will be aware of the needs, requirements and environments of recognised growth sectors, in particular positioning itself to become a location for the growing life sciences, agri-food and advanced manufacturing sectors.
- **Developing a programme for improvement rather than a shopping list of projects** - interventions will be interlinked and complement one another as opposed to a list of disparate and unconnected activities.
- **Ensuring Carn and Seagoe plays a key role in increasing the competitiveness of the MSW Region and Northern Ireland economy** – interventions will reflect the scale of the opportunities available in Carn and Seagoe and be at a level which will ensure that it can play a vital part in the economic growth of the MSW Region as well as the wider Northern Ireland

economy. Our vision therefore understands that improving Carn and Seagoe is not just important for ACBCBC.

WHAT WE ARE GOING TO DO

The proposed interventions will include a programme of environmental and infrastructure works that aim to enhance the aesthetics, visibility, branding, connectivity and ease of movement within the Carn and Seagoe area, unlock new sites for private sector development and enhance the setting and accessibility of existing businesses and properties in order to encourage additional trade and attract / stimulate business growth and inward investment.

We propose carefully considered, high quality interventions in infrastructure, landscaping and public realm provision, which have the potential to lever in significant private sector investment. The interventions put forward include:

- 1. Place shaping through landscaping and infrastructure provision:** Projects to improve landscaping, legibility and arrival points on the M12 gateway route are considered a key and critical intervention. This could be achieved through landmarks and elements that provide some visual/physical structure. Projects would also include environmental improvements to estate roads and street lighting infrastructure plus landscaping and public realm interventions to address key areas and gateways which are currently not attractive or welcoming.
- 2. Carn and Seagoe Branding:** Undertake a quality branding exercise for the whole of the economic area in order to ensure it has a higher profile and is recognised as an important business district in order to make it easier to market the economic area to potential investors. The project will also introduce a number of physical improvements including comprehensive signage at key gateways and corridors within and through the Carn and Seagoe area to aid navigation and enhance visibility of the area as a distinct business location.
- 3. Upgrade and extend the Pedestrian and Cycle Route network:** Projects to improve existing green travel routes (cycling/ walking routes) to increase connectivity and to create additional routes to provide further opportunities for safe and sustainable access, recreation and movement within the Seagoe and Carn area, between major occupiers and to the public transport nodes including the M12 and the two major railway stations at Portadown and Lurgan.
- 4. Green Buffers:** Projects to ensure clear and attractive screens between uses where conflict might arise and projects to screen instances of untidy and unattractive uses and sites that detract from the aesthetics and overall 'quality' of the area and undermine key vistas.

5. **Access to infrastructure such as energy, water and broadband:** Projects to understand and prevent a lack of infrastructure from becoming a limiting factor which hinders intensification and growth at Carn and Seagoe and to ensure that other interventions look to accommodate or facilitate improvements.

CONCLUSION

Industrial areas have suffered from many decades of underinvestment. Attracting new and retaining existing investment is a key challenge for the area and region. As the needs and uses being undertaken in these areas has evolved the environment and quality of place has not kept pace. It is clear that a failure to provide economic areas that reflect the necessary brand qualities and place requirements that today's businesses expect will result in lost investment and the relocation of existing businesses to other countries.

Developing the right environment to stimulate private sector investment in Carn and Seagoe is key to the future of the area. The public sector alone will not be able to create the levels of change that are required. Because of the scale of Carn and Seagoe, the level of economic benefits which will be generated from improving the area will be significant and will help achieve many targets linked to jobs, enterprise growth, economic diversification and brownfield land. Improving the area will therefore help achieve many of the objectives associated with increasing the economic competitiveness of the MSW Region.

To deliver the environmental and place improvements required to stimulate this investment it is recognised that transformation will need to include a significant programme of environmental and infrastructure works with a current estimated cost of £11,500,000. Such investment will enable transformational improvements to the aesthetics, visibility, branding, connectivity and ease of movement within the Carn and Seagoe area, unlocking new sites for private sector development and enhancing the setting and accessibility of existing businesses and properties in order to encourage additional trade and attract / stimulate business growth and inward investment.

REGENERATION OF ARMAGH GAOL

Armagh City and District Council acquired Armagh Gaol in the late 1980s and for many years has been striving to preserve its unique heritage, to slow down further deterioration of its fabric and to deliver best value from the asset for the community. As an outcome of a formal expression of interest process, The Trevor Osborne Property Group (TOPG), was appointed as preferred development partner to lead on the regeneration of this “iconic” site. TOPG is a long-standing, highly experienced developer who has completed many regeneration schemes, notable examples including Oxford Gaol; and the Buxton Crescent scheme scheduled to complete during 2020 to name a few.

BACKGROUND

Since Armagh Gaol ceased to operate, there has been an ongoing focus to seek to identify a new regeneration vision for this strategically located site in Armagh. The Council acquired this asset from a place shaping perspective so as to ensure the regeneration of this historic heritage asset would bring maximum benefit to overall growth and investment of Armagh City as a whole. With heritage assets such as this, there is a heritage premium in the redevelopment of such sites, in that the costs to rejuvenate are significantly greater than any brownfield alternative site. This has been a challenge for the overall funding envelope, private and public, for the project.

THE OPPORTUNITY

The aim of the project is to regenerate the Armagh Gaol site as a new iconic destination, supporting the future economic growth of Armagh city. The project will deliver a mixed-use development, which will generate sustainable economic and social benefits for the community, as well as providing a focal point for new community shared civic space.

The “Vision” for the project is to create a sustainable shared space within the walls of the Gaol, to benefit the local community and economy, through the development of a “destination”, to attract visitors locally, nationally and internationally and to deliver a positive experience for all users.

Armagh Gaol, one of Northern Ireland’s most important historic buildings, is a landmark building within the city. It is B+ Listed and is on the “Buildings at Risk” Register (Northern Ireland). The current project proposal is assessed to be the optimum solution for the Gaol in terms of viability and sustainability and if it does not

proceed, it is likely that the Gaol will continue to deteriorate physically to a point at which regeneration is no longer viable.

The proposed regeneration of the site seeks, to change how the physical environment of the area is perceived by creating new opportunities for economic development, interacting with the local community, attracting visitors, not just locally, but from across the island and internationally and encouraging consolidation and further development of community and social cohesion. This will benefit the local community, by turning on its head, the previous perceptions of the space by creating a focus for public participation and enjoyment. Specifically, the project will deliver economic, social and urban regeneration through a mixed-use development, incorporating a high-quality hotel, spa, limited retail and leisure, “enabling” residential development, a Heritage centre and the creation of major new shared public spaces. A simple descriptor could be – creating a “Cathedral Quarter” type area and destination, within the walls of the historic Gaol. The project accords well with the new Armagh City, Banbridge and Craigavon (ABC) Tourism Strategy which aims to develop the tourism potential of the ABC area. The delivery of the Gaol scheme will be transformative in its ability to provide much needed high quality bedspaces in the area and to thereby grow visitor trips, spend and returns for the entire ABC area. This is particularly important in the context of other significant Tourism product development investments planned within the area such as the development of signature Game of Thrones visitor attraction.

THE VISION

To regenerate and restore Armagh Gaol to create a destination focus attraction regionally, and on an island basis by developing on the site;

- A 4-star hotel with 80 rooms, including serviced apartments
- 22 residential apartments
- 10,000 sq. ft. of retail/ commercial space (including restaurants)
- An interactive heritage facility
- New shared public realm and public space

There are a number of project differentiators which set this project and includes the fact that:-

- The project has already secured a private sector delivery partner and an investment commitment of £11 million to deliver the scheme.
- The project has secured planning and listed building approvals
- The project can immediately offer an opportunity for the injection of approximately £20m+ during the construction phase into the local (and NI) economy and the creation 200 jobs during construction and of 150 permanent jobs on completion. The project is forecast to generate a GVA of approximately £2.4m per annum to the local economy and the

overall economic impact is estimated to be approximately £4m per annum.

WHAT WE ARE GOING TO DO

The Council has been exploring external funding services for this project, however since there is a heritage premium related to regeneration of this historic asset, a funding deficit remains. The intention would be to access funding to enable the project to proceed.

CONCLUSION

The Armagh Gaol Project is a significant project with the potential to a destination attractor and deliver real benefits for Armagh and Northern Ireland as a whole. The project will create much needed economic growth and jobs for the local economy. It will also create new shared public space to consolidate further building community relations.

The project is at a state of readiness, with a committed private sector investment, partner, statutory permissions in place but now requires a joined-up partnership approach by other key funders to enable delivery.

The Gaol and Armagh City is an area of significant heritage value. Many of the important pieces of architecture in the city are in public ownership and it is critical that a holistic and strategic view of the uniqueness and heritage value is taken by those who are custodians of it. Support is sought to finalise the funding gap so that the project may proceed.

BOOSTING INNOVATION AND DIGITAL CAPACITY

SWC ENGINEERING AND SKILLS INNOVATION CENTRE

See attached proposition paper

INDUSTRIAL INVESTMENT CHALLENGE FUND – PART 2

Paper to be provided by AMcK end March 2021

ROBOTICS & AUTOMATION INNOVATION CENTRE AT CAFRE LOUGHRY CAMPUS

The proposed intervention is a collaboration between the College of Agriculture Food and Rural Enterprise (CAFRE) and the Northern Ireland Technology Centre (NITC) at Queen's University Belfast (QUB) to deliver a Robotics and Automation Innovation Centre (RAIC) as a joint collaborative facility of the Advanced Manufacturing Innovation Centre (AMIC) in the Mid-South West (MSW) region, focused on the Food and Drinks Manufacturing Sector. CAFRE is a public land-based college which is an integral part of the Department of Agriculture, Environment and Rural Affairs (DAERA). The centre will be based at CAFRE's Loughry Campus, a recognised centre of excellence for food with world-class facilities already used to develop sector skills and competitiveness through education, training, and technology transfer programmes, to meet the needs of Northern Ireland's food industry. The intervention will aspire to provide the sector with fully functional and customised robotics and automation solutions in order to improve productivity, sustainability and resilience through optimising yield, minimising waste, increasing food safety, maximising operator safety and reducing operational costs.

The RAIC will provide access for companies to continue to learn, test and embed enabling technologies and automation, develop skills and expedite process improvements.

Ideally placed to facilitate the knowledge and technology transfer and practical application/demonstration of such technology, CAFRE's association with NITC will ensure extensive robotic modelling expertise from other manufacturing sectors (including automotive and aerospace) is brought to the food manufacturing environment.

BACKGROUND

The Northern Ireland Food and Drinks Processing Sector is a £5.2 billion industry with over 24,000 employees, accounting for 35% of total manufacturing sales, 77% of which are outside Northern Ireland¹.

(NISRA) 1 Department for Agriculture Environment and Rural Affairs (2020) Northern Ireland Food and Drinks Processing Report 2018.

Northern Ireland food and drinks companies are facing economic pressures due to a combination of issues:

- Labour is becoming more expensive as a result of commitments to the National Living Wage, exacerbated by a reliance on non-UK national/migrant labour.
- Raw material costs are increasing with the imports subject to Brexit-related currency fluctuations.
- The current state of food retail has seen significant margin pressures in the food supply chain.
- Increasingly stringent national and international standards of ensure quality, safety, and sustainability need to be met.
- Social distancing caused by the Covid-19 pandemic is causing many food and drink businesses to adjust factory layouts and remove labour intensive production systems.

The NI Food Industry is actively considering the innovative use of robotics and automation as a means to mitigate these challenges. The absence of a centre in Northern Ireland only serves to compound the existing challenges already being faced by food and drinks companies. Northern Ireland has been the lowest or next to lowest in the UK regions innovation rankings for many years with many barriers to innovation cited³ including availability and cost of finance, lack of leadership, technological, research & development, creative thinking skills, risk aversion and lack of understanding of innovation. Northern Ireland is currently the least innovation active region of the UK.

These challenges are not unique to Northern Ireland. According to the International Federation of Robotics (IFR) many manufacturing companies are responding to issues, including the impact of the Covid-19 crisis, by increasing investment in robotics (+65% in 2020)². It is anticipated that automation will be one of the biggest changes in manufacturing, as countries emerge from “lockdown”.

Currently, the UK is not following this trend. IFR reported that whilst sales of robots in the EU increased by 12% in 2019, they fell in the UK by 3%. The UK has not been a large market for robots, only ranking 22nd worldwide in 2019. Among these installations only 4% are food related.

Northern Ireland is preparing indirectly for automation through a number of strategies: The NI Innovation Strategy 2014-25 aims for NI to be an innovation hub, with plans to spend £1.2bn per year on research and development.

The Outcome Delivery Plan for 2018-19 contained several objectives and commitments that supported automation:

Outcome 1: We prosper through a strong, competitive regionally balanced economy;
Outcome 5: We are an innovative, creative society where people can fulfil their potential; and

2 International Federation of Robotics (2020). Post Covid-19 Economy: “Robots Create Jobs”. Press Release, issued 14/4/20
3 Northern Ireland Executive (2014). NI Innovation Strategy 2014-2025, issued 9/9/14.

Outcome 6: We have more people working in better jobs.

The Department of Agriculture, Environment and Rural Affairs (DAERA) has a draft Innovation Strategy 2020-25 which derives from the Science Strategy Framework and is integral to its implementation. The strategy aims to create an enabling environment within DAERA to support innovation and the implementation of innovative actions within the Department as well as the establishment of an enabling, external environment to encourage and support innovation within the sectors for which DAERA has responsibility.

DAERA is also committed to a “Green Growth” future for Northern Ireland with the ambition of boosting business productivity and profitability while also benefiting the environment. Robotics will go some way to addressing these ambitions by reducing carbon, enhancing profitability, lowering waste and increasing efficiency.

OPPORTUNITY

The majority of food manufacturing companies, particularly the smaller businesses, have very limited resources and neither have the specialist expertise to examine their own productivity, nor develop and test new technology that may improve it. There is, however, evidence of the deployment of such technology in our local food industry. The current levels of automation in local food manufacturing largely mirror those experienced across the UK. End-of-line processes have benefited from the learning which has originated in other manufacturing sectors. Research and development into automation of primary and secondary food manufacturing processes is an obvious opportunity.

It is anticipated that introduction of automation and robotics will have a net positive economic and social impact once costs and benefits are calculated. A recent report by ⁴Barclay’s estimated that a UK investment of £1.2bn in robotics, would yield a net benefit of £60bn. Focusing specifically on food processing, this investment would see increases in productivity of 25% by 2025, whilst maintaining employment levels (through upskilling operators into new roles).

Undoubtedly the significant capital outlay required for such technology has been a barrier to adoption. The financial stakes for embracing new technology may be high, but the rewards could be transformative.

This intervention will help businesses understand the complexities of automation, and reduce the risk of wasted capital investment by seeing a demonstration of the technology and calculating the return on investment in advance of procurement.

Consultation with the industry to date has flagged the requirement for this intervention as “immediate”.

4 Barclays Bank 2015, “Investment in manufacturing robotics could boost British economy”. First accessed 20/5/20.

CAFRE has also engaged with, and drawn on the experience of other centres to maximise the impact of such an intervention in the MSW region. CAFRE has previously established links with both the University of Lincoln and Sheffield Hallam University, both of which have made considerable investments in food automation projects. They have attracted national R&D funding from a number of government interventions. Whilst Lincoln are further on their “automation journey”, they cite the same rationale for the need for intervention and identify the same challenges. The university is, like CAFRE, keen to see robotics embedded in the curriculum as they have identified a shortage of future employees with the correct skills and knowledge.

A DAERA funded pilot project between CAFRE and NITC (scheduled to commence April 2021) will attempt to demonstrate this need and endorse this proposed intervention. CAFRE will adopt a formal programme and project management approach, supported by a Robotics and Automation Oversight Board (RAOB). The broad remit of the Board will provide overall direction and management for the project and to take key decisions including the commitment of resources.

THE VISION

This intervention will strive to:

- Establish a new Robotics & Automation Innovation Centre of Excellence at CAFRE’s Loughry Campus, in the MSW region.
- Be the NI springboard for manufacturing innovation for the Food and Drinks Industry
- Provide the industry with access to the very latest manufacturing technology and Industry 4.0 smart automation, supported by experienced, professional engineers working with CAFRE Food Technologists
- Accelerate new technologies through the innovation phase by solving real-world industrial challenges through research and development.
- Create a unique environment where companies can develop prototypes, demonstrate scale-up, and experiment with new processes, materials and smart technologies before implementing in their own factories.
- Provide an innovation landscape which encourages technology pull-through from university laboratories to a pre-commercialisation scale, in collaboration with industry.
- Foster and support a collaborative manufacturing innovation ecosystem in NI that brings coherence and greater impact to the NI advanced manufacturing sector and greater national partnership and funding opportunities.
- Immerse future generations of food & drink learners in the latest new innovative technologies for the sector.
- Add to the value proposition of CAFRE’s existing offer and footprint in the MSW region to support the growing food & drink sector through the co-location of services/resources on one site which will achieve significant economies of scale.
- Promote opportunities for other manufacturing and knowledge sectors to engage collaboratively with food businesses.

- As a similar requirement for all major CAFRE capital projects the RIAC will built to contemporary environmental standards to minimise the environmental footprint – being more effective in the use of resources in order to make large reductions in use of natural resources, carbon emissions and waste production.

WHAT WE ARE GOING TO DO

We will

- Ensure the partnership between AMIC and CAFRE (through the RAIC) is delivered in collaboration with key industry stakeholders.
- Define how the RAIC, as part of the AMIC network in MSW, will ensure investment coordination between CAFRE and BRCD minimising duplication and waste
- Provide the Food Industry with a 'single front door' for accessing innovation support, skills development, state of the art equipment and specialist knowhow.
- Support industry collaboration with Universities and the Further Education sector who have expertise in the digital skills and knowledge associated with Industry 4.0.
- Provide the industry with access into advanced R&D and investment networks across the UK and Ireland - participate in major national innovation programmes and attract indigenous and foreign direct investment.
- Centre will share and disseminate best practice with other regions, establishing links with other similar centres.
- Act as the focal point for the development of higher value-added skills curriculum and related apprenticeships for advanced manufacturing and the industrial economy of the Food Industry.

CONCLUSION

It is anticipated that this intervention will bring substantial innovation, research and development, skills and workforce development benefits to one of our key manufacturing industries.

The project will aim to and deliver a close, collaborative relationship between the Robotics and Automation Innovation Centre and the proposed Engineering Innovation and Skills Centre, through South West College.

AGRI FOOD INCUBATION AND INNOVATION SECTOR SUPPORT

INTRODUCTION

The 'Going for Growth' strategy prepared by the Department for Agriculture, Environment and Rural Affairs (DAERA) provides the policy context for the support and development of the agri food sector in Northern Ireland.

Evidence and data prepared by UUEPC and Morrow Gilchrist to inform the development of the Mid South West Regional Economic Strategy (RES) indicates the significance of the contribution of the agri food sector to the Mid South West Region and Northern Ireland economies.

Across the region there are a number of major food producers including Moypark, Irwins, Whites, Wilson Country, Strathroy Dairies, Dale Farm and Linden Foods. Many of the food producers have developed from small to medium enterprises up to major companies. The agri food sector is complex and is reliant upon an ecosystem that involves agricultural producers, growers, supplies, hospitality and logistics. As a result, the sector has a number of interdependencies.

The Year of Food and Drink in 2015 raised the importance of agri food from growers to chefs. However, the sector does not receive the profile to reflect its economic significance within Government and particularly in the Department for the Economy and Invest NI strategies and plans. The recently announced Economic Recovery Plan highlighted that a strategic review of agri food would take place between government departments and it is imperative that this review acknowledges the prominence of the sector and its economic contribution.

BACKGROUND

Information and support to agri food companies in Northern Ireland is provided by CAFRE, Southern Regional College (SRC), South West College (SWC) and the enterprise centres. Representatives from Queens University, Ulster University and groups including Manufacturing NI, Food NI and the Northern Ireland Food and Drink Association provide advocacy and lobbying on behalf of their membership.

Anecdotal demand and queries highlighted the need to prioritise pre-enterprise, innovation and incubation space to support the further development of the sector.

THE OPPORTUNITY

A feasibility study undertaken by Williamson Consulting (attached) indicated the need for incubation facilities in the Armagh City, Banbridge and Craigavon Borough Council (ACBCBC) area.

Proposals for new facilities within the Southern Regional College include two comprehensively equipped training/development kitchens which will be used for education and hire by businesses.

However, there is a requirement for manufacturing production facilities in a separate venue to encourage start-up businesses that have the ability to scale to move on to larger premises freeing up smaller facilities to accommodate new food businesses on an ongoing cyclical basis.

A new partnership structure will be set up to progress plans and facilitate the development of the food incubation and innovation project. Discussions have commenced with Invest NI, SRC, CAFRE and ACBCBC to more fully scope out and identify the needs of the sector.

Depending on the site and nature of the facility, it will need to be in an appropriately zoned site or one for which planning applications for change of use are likely to be favourable e.g. Denny's site, Portadown.

THE VISION

Food incubation facilities can include one or more of the following elements:

- Food grade small scale business incubation units- these can be fully serviced and supported with add-on facilities or stand-alone
- Shared use production kitchen
- Shared use development kitchen
- Product test facilities
- Laboratory facilities
- Business Support Services
- Packaging and labelling support
- Advanced and specialist food technology and development support, advice and training facilities
- Technology sharing/transfer through partnership
- Food standard best practice support

It is evident from the feasibility study that there is ongoing demand for suitable start-up premises for agri food companies. In order to facilitate the wide ranging requirements of a variety of businesses, the following considerations apply:

- A site large enough to allow for parking and delivery vehicle access to all units
- Sufficient car parking
- Units with a very flexible layout, with the potential to incorporate:
 - Access for staff into changing area, with clothes hanging facilities and washing provision
 - Toilets accessible to changing area but not manufacturing or storage areas
 - External good access into an intake/dispatch area

- Goods storage area off intake/dispatch area with room for separate storage of finished goods and raw materials (possibly chilled/frozen although not included at this stage)
- Separate storage off the production/manufacturing space for packaging, cleaning materials (could be with the changing facilities) and food items
- Own door access and independent security arrangements
- Individual 3 phase electricity supply
- Individual water supply
- Drainage to food standards including individual grease traps for each unit
- Individual air handling/ventilation to generic food standards.

SUPPORTING RESEARCH

ACBCBC commissioned KPMG to undertake a Recovery and Growth framework. An immediate action is to determine the needs and level of demand for pre incubation and innovation support.

In addition, Alan McKeown of Food for Thought has undertaken analysis relating to the development of an industrial challenge fund which identified the future research and development needs of businesses.

An agriculture strategy for ACBCBC will establish the need for access to future research for the agriculture and farming sector in the Mid South West Region. It is intended that this will be a separate but complementary innovation proposal developed in partnership with the Agri-Food and Biosciences Institute (AFBI).

As each of these pieces of research conclude, the evidence and data will shape an agri food incubation and innovation proposal and a proposal that will meet the future research needs of the agriculture and farming sector.



AGRI-TECH INNOVATION FACILITY - AFBI

Scope of intervention to be informed by ABCBC Agricultural Strategy

THE DEVELOPMENT OF A DIGI-HUB NETWORK IN MSW

The Mid South West (MSW) Regional Economic Strategy (RES) identified that, given the region's ageing population and expected slowdown in population growth, increasing productivity will become the most important driver for success. The RES also sets out a commitment to boosting innovation across existing and emerging sectors, including the digi-tech sector, which is currently under-represented across the region and presents a significant opportunity to super-charge economic growth and deliver high-value jobs.

To this end MSW will develop a network of Digi-Hubs to enable businesses to better understand how to start-up and/or improve their processes, products and services through the use of digital technologies. The hubs will be visible locally-based foci and will provide a structure for sectoral focus, leadership, networking and working remotely in small groups. In addition, they will enable collaboration between individuals/companies in the digital tech arena and local communities, and support stimulation of small scale innovation projects. They will also act as a 'gateway' into training and education.

The attached proposition for an 'Enterprise and Innovation Digi-Hub' (EDIH) in Omagh town centre will be the first digi-hub establishment within the MSW collaborative network. This digi-hub will be high spec and aligned to the South West College's Omagh Campus and Strule Shared Campus. It will seek to increase the proportion of the small business sector made up from the knowledge based economy and contribute to the infrastructure required to promote digi-tech entrepreneurship through partnerships between secondary and third level education, innovation and enterprise networks and the SME sector.

Planning for extending the collaborative digi-hub network is being progressed in other MSW locations including for example Banbridge, Portadown and Armagh to provide businesses and communities with the optimum opportunities to embrace digital transformation and/or the recreation of their technology practice and function. The context and scope of the wider network will be fully explored as part of the business planning process.

ESTABLISHMENT OF AN OMAGH ENTERPRISE AND INNOVATION DIGI-HUB (EIDH)'

A key intervention proposed within the Mid South West Regional Economic Strategy is the establishment of a network of digi-hubs across the MSW Region.

A digi-hub aims to provide a collaborative space for digi-tech companies to cluster and grow, aligned to wider support networks, eg, Council LED teams, enterprise companies, our regional colleges, Invest NI regional networks and with Catalyst Inc

BACKGROUND

Manufacturing (including Agri-food and Advanced forms) is central to the MSW region's economy providing almost a fifth (18%) of total workplace employment and a third (35%) of the region's GVA, well above the NI average for both. 39% of NI's Manufacturing employment is in the MSW region and 23% of its GVA. The region's economic profile has shown that it has less specialisation in the digi-tech sector.

The proposed intervention is located in the Fermanagh and Omagh District Council area of the MSW region. The business base of Fermanagh & Omagh District Council is one of micro-business as 94% of businesses employ fewer than 9 people and 45% have a turnover of less than £50,000 per annum. A review of the economic performance data for the council area confirms the need for intervention as agriculture and construction dominate the small business sector. Average wages in the district are also below the NI average. There are high levels of entrepreneurial activity within the area with 11% of NI's businesses compared to 6% of the NI population, however, there is a need to support and promote the development and growth of these businesses, including through access to innovative approaches.

The labour market structure of Fermanagh and Omagh reflects that of NI with 73%/27% economically active/inactive. Lisanelly SOAs 1 and 2 which are located beside the proposed digi-hub site fall within the top 3 areas of multiple deprivation within the Council area. Through the provision of new employment opportunities, the EIDH will bring economic inclusion to some of Omagh's most disadvantaged wards.

The Council's educational outcomes are amongst the highest at LGD*14 level, with 62% of school leavers achieving at least 2 A Levels; 49% go on to higher education. Every student however does not achieve such grades and therefore the EIDH, through the provision of skills and employment, will contribute towards making these outcomes more equitable. As a result, investment in the EIDH will provide local opportunities for high value jobs, for which people are currently commuting outside the region or leaving the region to secure. The project will not only address the regional imbalance in the economy but also positively address issues of sustainability and climate change

Omagh has one of the highest rates of vacant sites across NI and this will be increased further through the relocation of 6 schools based in the town to the new

Strule Shared Campus which is due to open in 2025. The EIDH will transform 24,500 square feet of derelict space located in the town centre into a vibrant hub to allow local entrepreneurs, businesses and the community to prosper.

THE OPPORTUNITY FOR AN INNOVATION AND DIGI-HUB IN OMAGH

The 'Stimulating Regional Economic Growth: A Socio-Economic Analysis of Smart Working' Report commissioned by Vodafone Ireland

http://digitalmagazines.online/Vodafone_Gigabit_Hub_Report.pdf undertakes a study of the direct and indirect benefits of six digi-hubs located across rural Ireland in Dundalk, Drogheda, Kilkenny, Carlow, Kerry and Cork. The report concludes that "the growth of digital hubs and smart working is making a significant contribution to the renaissance of regional towns and is helping to alleviate urban migration and slower regional economic recovery". Some of the benefits evidenced in the report include:

- High-quality, highly skilled jobs in the regions
- Business creation, growth and expansion
- Increased economic activity, local spending and employment in rural towns
- Reduction in congestion and commute times
- Increased productivity.

To replicate the success experienced in Ireland, an opportunity exists to kick-start the process to create a network of digi-hubs across the MSW region through the development of an Enterprise and Innovation Digi Hub in Omagh located on the site of the vacated former Health Centre, sitting within the town centre boundary. This site has been acquired by Omagh Enterprise Company, supported by Fermanagh and Omagh District Council, through the Community Asset Transfer process. The site is located adjacent to the South West College Omagh Campus on Mountjoy Road and close to the Strule Shared Campus which is due to open in 2025. This project offers an opportunity to support and diversify the existing business base, increase productivity and contribute to economic inclusion through the provision of higher wages and salaries. A strategic partnership with Catalyst Inc, Belfast will foster creativity and innovation to develop the right mix of skills for future sustainable economic growth. Project costs and the funding requirements are outlined below:

Furthermore, the Covid-19 pandemic has brought about a seismic and permanent change to way we work. Evidence from one research study has shown that the vast majority of global knowledge workers (72%) prefer a hybrid arrangement that combines the home and the office. Workers are far less enthusiastic about going all in on one environment: Only 12% would prefer working from the office all the time. <https://slack.com/intl/en-gb/blog/collaboration/workplace-transformation-in-the-wake-of-covid-19> There will be a need to provide local opportunities to facilitate this shift with the opportunity to accommodate many digi-tech workers in locations closer to

their homes. Both Omagh Enterprise Company and Fermanagh Enterprise have noted this spike in demand over 2020 with both experiencing full occupancy levels.

THE NEW VISION

The Vision is to create positive opportunities to grow the economy by boosting the digi-tech sector in the MSW region through provision of collaborative networks and spaces to enable digi-tech companies to start-up, cluster and grow. A high spec digi-hub will be established in Omagh town centre aligned to the South West College Omagh Campus and Strule Shared Campus to increase the proportion of the Council's small business sector made up from the knowledge based economy and to contribute to the infrastructure required to promote digi-tech entrepreneurship through partnerships between secondary and third level education, innovation and enterprise networks and the SME sector.

WHAT WE ARE GOING TO DO

Refurbishment of the vacant former Omagh Health Centre building as an Enterprise and Innovation Digital Hub will provide transformational benefits across three themes, including:

- 1. Building Communities:** • Supporting 40 businesses and creating 200 jobs. • Fostering enterprise, new business creation and social innovation within the community. • Providing a Digi-Hub to inspire and attract entrepreneurs, technology companies and community and voluntary groups to start sustainable businesses. • Developing strong and sustainable links between the six schools in the Strule Education Campus; South West College; businesses and industry; and enterprise and economic development support agencies. • Engaging with all stakeholders to disseminate best practice models of social enterprise to maximise their contribution to the community and the economy. • Offering opportunities for all sections of the community as the town centre location permits close working with thousands of students from schools and the South West College to nurture future digi-tech entrepreneurs and social entrepreneurs. • Providing access to a super-fast fibre broadband infrastructure and modern facilities to enable local people and to develop competitive businesses for the digital age.
- 2. Supporting People:** • Supporting people with a best practice enterprise and innovation digi-hub to ensure equity and inclusion for those living in areas of disadvantage with limited access to jobs or self-employment. • Providing flexible business workspace with 'easy-in, easy-out' leases for social entrepreneurs to work alongside and learn from commercial entrepreneurs • Supporting Department for Community and Council strategies for enterprise, social economy, economic development and town centre regeneration in line with the Outcomes Delivery and Community Plans. • Providing a pathway from education in the schools and college to self-employment and starting a

business as a viable career option. • Housing a Cafe Hub as a social enterprise run by entrepreneurs to employ local people and provide training and on the job experience. • Providing access to super-fast broadband for groups, students and young people interested in digi-tech self-employment and entrepreneurship. • Being led by an experienced Board of Directors and Management Team with a 30- year track record of success in developing similar projects as part of the organisation's core mission to support start-up, growth and social economy businesses.

- 3. Shaping Places:** • Transforming a derelict building and site in an area of social need, which struggles to attract investment or offer opportunities to the community. • Providing a proven and sustainable model of entrepreneurship to help transform the town centre by creating jobs, building community resilience and social capital. • Supporting previous plans that proposed an enterprise quarter to rebalance town centre, through the refurbishment and regeneration of a derelict building to support the creation of 40 businesses and 200 jobs. • Providing a hub of enterprise and business activity that adds value to the lives of communities, residents, entrepreneurs, students and visitors to the town. • Making a unique contribution to place shaping through the development of a regionally significant and completely sustainable flagship project.

CONCLUSION

The RES has established that it is essential the MSW Region invests in new and emerging sectors if it is to achieve its overall ambition to raise productivity and provide better jobs. A key enabler to achieve this is through boosting innovation and digital activity. Our region has an unrivalled track record of entrepreneurship and innovation. Given the right conditions through the provision of facilities, services and access to a collaborative and creative ecosystem within a digi-hub, there is no doubt that our people have the skills, energy and enthusiasm to take advantage of such an opportunity.

The Omagh digi-hub is the start of a regional MSW network of digi-hubs. This network will also facilitate the switch to new patterns of work, as demand for close to home enterprise hubs that provide business support and access to superfast broadband increases. The trend is already evident in everyday business activity as a significant structural and long-term economic growth model for regional towns and rural areas. Our region has already demonstrated that diverse and exciting indigenous businesses create high-value, quality jobs locally, injecting revenue back into rural towns and reducing the migration of people to urban centres and this intervention will support that.

TRANSFORMING OUR HIGH STREETS – Part 1 (Physical)

The purpose of this paper is to set out the case for much needed investment into Mid South West (MSW) Regional High Streets to enable a process of reinvention and transformation, reshaping our town centres by implementing ambitious, innovative and fresh interventions. The term ‘high street’ is used throughout the paper to describe the principal shopping area of our regional town centres.

BACKGROUND – THE CHALLENGES FOR MSW HIGH STREETS

The role and presence of our high streets has shifted dramatically in recent decades as a result of the inexorable rise of online shopping, change in global trends and national issues like austerity. The need to live more sustainably combined with addressing changing customer behaviours has resulted in high streets needing to be reinvented, repurposed and attract a mix of uses beyond the buying and selling of goods. Furthermore, the physical configuration of our high streets has shifted since the 1980’s giving way to a more mixed picture to where people shop, with an increasing bias towards prime out-of-town locations and retail parks. Whilst it is acknowledged that this shift has brought many benefits to consumers and overall retail performance, we recognise the significant impact on our declining town centres creating longer term sustainability challenges.

MSW region high streets are facing significant challenges as a consequence of lack of competitiveness due to higher operating costs than online competitors (eg property costs), underperformance, evolving economies, developing capability and changing technologies, advancements in artificial intelligence and automation, and the impact of coronavirus. These challenges have been further amplified with the implementation of mitigation measures to ensure customer safety, more precautionary consumer actions and subdued confidence levels leading to further decline in footfall and customer spending.

During lockdown multiple aspects of our shopping habits changed, resulting in people rediscovering their local areas and rethinking what they want from villages, towns and high streets, not just in relation to consumables. The reality of this ‘new normal’ has brought customer expectations into sharp focus with the demands for a different high street experience, one which embraces culture, community and everyday economies, digitally smart technologies and infrastructures, provides access to services, gateways to recreational and greenspaces, promotes active travel and considers accessibility for all users.

MSW high streets are facing the following common challenges and trends (in no particular order):-

- Dramatic impact of Covid-19 and social distancing/capacity requirements as a direct consequence of the pandemic and adjusting to the “new normal”;
- Building consumer confidence to visit high streets;
- Accelerated trend towards online shopping
- Changing shopping habits/patterns e.g. more people shopping during the week and/or on an ‘as needed’ basis;
- Declining footfall and spend across high streets;
- Rising vacancy and dereliction levels;
- Contracting retail sector/retail declining as a dominant occupier in town centres;
- Decline in traditional outdoor markets;
- Protecting the current business base;
- Falling market demand/low level of investor confidence;
- Rising costs of doing business and the need for rates reform;
- Changing work patterns, with more people working flexibly and remotely;
- Rising unemployment affecting disposable income;
- Constrained areas for transport modes, pedestrian, cycle and vehicular;
- Increasing traffic congestion, air pollution and climate emergency (green agenda);
- Achieving sustainability and inclusive economic growth;
- Need for functional shared spaces for the community to reconnect with each other e.g. pop-up parks;
- Uncertainty of Brexit impacts;
- Changing demographics including a growing elderly population.

THE OPPORTUNITY FOR MSW HIGH STREETS

Notwithstanding the coronavirus crisis an opportunity exists for MSW to reimagine, regenerate and transform its high streets for the future, and indeed shape the ‘new normal’. It is an opportunity to recognise uniqueness and how local assets can be best developed and used to create safer, more attractive, accessible and vibrant places. MSW high streets must adapt and diversify into ‘multi-functional places’, which no longer rely on retail but offer wide ranging uses which contribute to the economic performance of the area as a whole.

MSW high street interventions must ultimately create the conditions that will attract greater numbers of people to live, visit, shop, work, walk and play, which collectively will increase spending in the region. As retail, society, technology and consumer behaviours continue to change, this transformation is essential not only to survive but to thrive. Interventions must therefore be significant in scale, scope and ambition in order to derive maximum benefit.

Multifunctional high streets will concentrate retail uses in primary cores with a wider range of commercial, cultural, community and residential uses encouraged to locate and revitalise secondary and tertiary areas. Success can be measured in

harmonising a broad mix of uses such as enterprise, residential, civic and cultural buildings, green spaces, offices etc.

The following opportunities have been identified to support the transformation of MSW high streets:-

- **Reimagining the physical and digital infrastructure** of Armagh, Banbridge, Craigavon, Lurgan, Portadown, Enniskillen, Omagh, Cookstown, Dungannon and Magherafelt;
- **Reviewing land uses** with a view to delivering viable multi-functional centres e.g. community, retail, office, hospitality, entertainment, housing, leisure etc;
- **Delivering smart technology** solutions and provide for inclusive digital connectivity – consideration of the revolutionary impact of digital technologies to create smart towns/city;
- **Wider place shaping** and urban regeneration through which high street rejuvenation will be embedded;
- **Identity** branding our high streets and town centres to show how the destination is unique and differentiates (and the experience they offer) from competitors'. The heritage and natural assets of our urban centres are often lost or hidden away due to a focus on historic uses that no longer occur or are considered irrelevant to the day-to-day functioning of the centre;
- **Quality of public realm** – transforming our high streets to be more accessible, for instance: rethinking parking provision, making wayfinding easier, provision of sustainable transport solutions etc.

An opportunity exists for MSW to introduce high street initiatives and interventions that will meet the needs of communities and customers now and into the future by investing in the right offering, facilities and experiences which will ultimately drive economies and footfall. MSW councils do not underestimate the challenges ahead and recognise that a place shaping approach, one which requires collaboration, collective action and decision making in the planning and delivery of targeted interventions is needed. Focus will be placed on shifting mind-sets from the traditional high street offering to more vibrant centres capitalising on natural assets and everyday economies, opportunities for increased social interaction and dwell time, access to services and maximising benefit for a broad mix of users.

A VISION FOR MID SOUTH WEST HIGH STREETS / TOWN CENTRES – POWER TO CHANGE

High streets are at the heart of our communities and are in a good position to reinvent and transform themselves. It is important to be bold in setting a vision which focuses on our high streets becoming more attractive, vibrant, diverse, inclusive, healthy and safe places to invest, work, live, meet, shop and visit.

MSW will create modern, vibrant and economically thriving urban centres taking advantage of the existing natural assets, heritage, cultures, neighbourhoods, and requirements of our residents and visitors to drive prosperity.

WHAT WE ARE GOING TO DO

MSW will deliver both a targeted and trial programme of interventions that will transform the economic, environmental, physical and digital infrastructure of our urban centres. Interventions will be test beds for new opportunities and will facilitate the delivery of creatively designed residential, leisure, retail, enterprise and infrastructure to connect people, places and spaces.

MSW aims to deliver targeted initiatives that will be:

- **Transformative** addressing under investment in our high street destinations to deliver exemplar places that will showcase and provide for current, emerging, and future priorities.
- **Vibrant** building an ecosystem of trade for the future with returning day and evening activity and footfall to key areas.
- **Unique** focusing on the natural, historic and cultural assets within our high streets/town centres to create a complementary smart and high tech identity.
- **Liveable** delivering residential living within our urban centres which will provide a range of social, cultural and economic opportunities.
- **Diverse** reflecting how people wish to live, work, enjoy their free time and support their local economy through a wider range of viable uses which are complementary to a more concentrated retail core.

The overall thrust and vision for our high streets will be based on the principles of determining change, promoting inclusive economies, design for mixed uses, managing assets innovatively, trialling new approaches and digitally transforming. Focus will be placed on experimental, strategic and pivotal initiatives which address transformation, underinvestment and underperformance through the targeting of key properties, historic and culture assets, long term vacancy and opportunity sites. This will involve investing in a combination of strategic capital and marketing projects.

The 'Transforming our High Street' intervention would incorporate the following **two** component parts-

3. Creating Spaces and Places for the Future

A capital financial support package to enable physical transformation through the acquisition, demolition, reconfiguration, rebuilding, revitalisation and/or redevelopment of properties/assets/sites/public spaces in order to unlock their economic potential. Unlocking their economic potential will act as a catalyst for high street revival, showcase new opportunities and an intense mix of uses, provide connectivity and infrastructure that will undergird transformation and

redevelopment, and improve the visual amenity, identity and connectivity of an area. This component part will also provide challenge funds to incentivise property owners to invest in the reuse and repurposing of their derelict/empty premises to create modern, lettable and digitally connected commercial and/or residential spaces. A wrap-around service to assist property owners to test innovative approaches and management when securing tenants for disused/underutilised commercial premises will be introduced.

4. Connected for the Future

This component part will deliver major digital and eco-friendly initiatives to reinvigorate MSW high streets. Focus will be placed on the development and implementation of adaptive, connected technologies and sustainable interventions to create 'smart towns' and provide a 'digital springboard' for businesses to maximise the benefits of the digital economy. Interventions will include provision of high speed connectivity including 5G technology integration, smart and enabling technologies, big data capability, green transport systems and building innovative construction solutions to deliver high tech infrastructural improvements/advancements. Carbon emission reduction, adoption of green building practices and green growth will also be key in delivery of interventions. In addition, interventions will look to showcase and promote the latest available technologies and digital applications/tools that will help grow the region's urban centres as unique, modern, connected, healthy and sustainable places to live and work.

Both component parts will support the viability and vitality of our rapidly evolving high streets by unlocking economic potential and leveraging private sector investment.

CONCLUSION

MSW Region high streets have reached a turning point. Lessons learned in recent years show that greater innovation, collaboration, collective action and decision making, and significant financial investment are all necessary to support a process of transformation in order to meet the evolving needs of consumers, businesses, investors and communities.

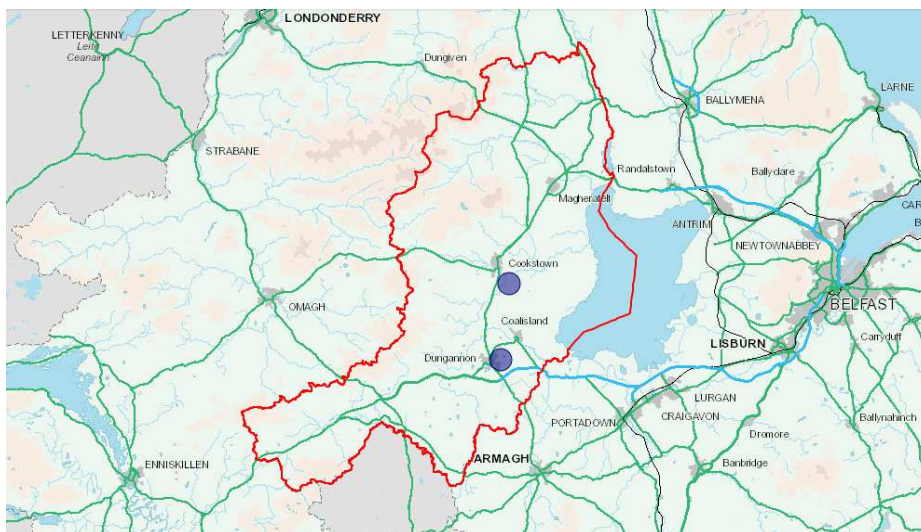
MSW councils recognise that reinvention and transformation of the Region's high streets will require substantial commitment and investment from the Northern Ireland Executive, UK Government and other funding sources. Such investment will enable our high streets to be convenient, connected, enterprising, offer certainty of product availability, provide experiences that cannot be replicated online, and an intense mix of uses to become places of choice for communities to live, visit, shop, work, walk and play.

The interventions to be delivered in achieving the ambitions for our High Streets are significant, but appropriate in light of the challenges faced. It is anticipated that the NI

Executive will invest in Part 1 'Creating Spaces and Places for the Future'; and the UK Government in Part 2 'Connected for the Future'. Although we are seeking investment for the component parts from the two separate sources, we anticipate that both parts will be delivered in parallel.

DEVELOPMENT OF 'THE O'NEILL' TOURISM PROPOSITION

The Mid South West (MSW) Region encompasses two of the most important historic sites in Ireland; Hill of the O'Neill and Tullaghoge Fort. Both attractions are of major historical and cultural significance within Irish history and have an exceptional ability to drive footfall to Co Tyrone and the wider Northern Ireland region. This paper will document the much needed interventions that are required to elevate Hill of The O'Neill and Tullaghoge Fort in providing a significant proposition and competitive advantage to position MSW region within the 'all island' visitor economy. These ambitious interventions will take a three pronged approach with focus on the creation of exceptionally high quality product development, the implementation of state of the art digital solutions and the enhancement of the tourism infrastructure. The innovative, ground breaking interventions proposed will uplift these visitor attractions and in addition the town of Dungannon onto the world stage, competing with internationally renowned immersive visitor experiences.



Above map shows the location of Hill of The O'Neill, Dungannon and Tullaghoge Fort near Cookstown

HISTORICAL CONTEXT

In the late 16th Century, Dungannon was the powerbase of Gaelic Ireland and the centre of world affairs as Hugh O'Neill, Earl of Tyrone challenged English rule in Ireland. The Nine Year's War, often referred to as Tyrone's rebellion, was the climax of English attempts to conquer Ireland dating back to the Norman invasion in the 12th century. With Spanish military assistance, the powerful military alliance led by Hugh O'Neill of Tír Eoghain and Red Hugh O'Donnell of Tyrconnell, threatened to defeat the English at the Battle of Kinsale on December 24, 1601.

The Gaelic chieftains were defeated at the Battle of Kinsale and Hugh O'Neill and Red Hugh O'Donnell were eventually forced to leave Ireland, in what is now known as the "Flight of the Earls," in 1607. The two Irish chieftains accompanied by over ninety of their followers, set sail from Donegal, bound for Spain. This period in Irish History effectively ended the Gaelic order in Ireland and paved the way for the "Plantation of Ulster".

The Flight of The Earls in 1607 is unquestionably one of the most pivotal events in Irish history, during which the Earls of Ulster fled from Ireland to Europe to avoid being captured and imprisoned by the English. This signified the end of an era in Irish history, of Ireland being ruled by Gaelic chieftains. While the English had been present in parts of Ireland since the 11th century, it was only after the *Flight of The Earls* that the English took control of the entire country. In the period that followed, major changes occurred as the English seized the opportunity to complete their plans for the Plantation of Ulster. The events that happened during this historical period helps to explain the complexion of the Northern Ireland in which we live today.

Tullaghoge Fort and Hill of The O'Neill fall within the Mid Ulster District Council area. Tullaghoge Fort, Cookstown was the historical O'Neill seat of power and inauguration site from the 11th century. While the O'Neill's later moved to the strategic hilltop in Dungannon in the late 13th century, Tullaghoge Fort remained as the site where generations of future O'Neill's would be inaugurated as the Chieftain of Tír Eoghain, high king of Ulster. Both locations are impressive with commanding views over the vast swathes of lands controlled by The O'Neill's for nearly 400 years, reflecting their dominance over a significant period in Ireland's history.

The story of the Gaelic chieftains notably spans across the MSW region and indeed throughout Ireland. The collective history within the region provides us with significant competitive advantage over other areas. Capitalising on this historical narrative will not only benefit the Mid Ulster region but also has potential for the entire MSW area and will act as a catalyst for partnership projects encouraging working as a collective to elevate the tourism offering within the region.



English cartographer, Richard Bartlett's historic depiction (circa 1602) of Hill of the O'Neill (Dungannon) (centre) and Tullaghoge Fort, the crowning site of The O'Neill's (bottom) depicting the Leac na Rí (seat of kings).

Historically referred to as "Bartlett's map" this image clearly demonstrates the significant connection between both Tullaghoge Fort and Hill of the O'Neill in this period of Irish History, a connection that has continued to the modern day.

BACKGROUND

These two cultural heritage locations have major significance within the context of Irish, British and European history and should be matched with investment that positions them amongst the leading Cultural Heritage attractions within Ireland that appeal to national and international visitors.

Currently both locations and, by association Dungannon town, struggle to compete within the tourism market due to a number of interdependent factors. Firstly, an over reliance on traditional methods of interpreting this intriguing and central story in our shared history. There is an increasing requirement for strong experiential tourism. Investment is required to fully realise the economic, cultural and social potential that exists to transform and re-imagine the heritage offering and to capitalise on the story of the O'Neill's and the history of Ireland's Gaelic chieftains.

Tourists/visitors to cultural heritage sites now demand "info-cultural-tainment" experiences combining leisure, entertainment, culture, education and sociability. As a result, Cultural Heritage and tourist attractions are using modern technologies, such as Augmented Reality (AR), to enhance visitor attractions with, and perceptions of their real-world environment. AR is widely regarded as one of the most promising and cutting edge technologies of modern times and its development and implementation in a cultural heritage setting provides opportunities for increasing competitiveness; to create new value at cultural heritage sites where visitors can

explore the unfamiliar surroundings in an enjoyable and unique way; contributing significantly to an enhanced and enriched cultural heritage experience; and providing greater scope to reach wider audiences than ever before.

Secondly, Dungannon town centre, despite its rich heritage and central position in Irish history, faces significant challenges. Like many high streets and town centres across the UK, it too is encountering a steep decline in footfall. Given its historic town status, Dungannon is largely dependent upon the travel tourist to attract footfall into the town centre.

Lack of accommodation and hotel provision presents challenges in attracting visitors, with the majority of beds available centered in Belfast. Dungannon, despite its central location, has no hotel provision. Notwithstanding the historic challenges of no overnight stay provision, now there is an opportunity to replicate the successes of projects undertaken elsewhere in NI in the acquisition, restoration and redevelopment of key historical assets as boutique style accommodation and other complimentary facilities. Unlocking this economic potential will act as a catalyst for leveraging private sector investment into Dungannon town centre together with enhancing the visual aesthetics of the heritage townscape.

CHALLENGES

The emergence of new adaptive and interactive technologies has transformed the Tourism sector. These technologies have revolutionised travel behaviours, such as decision making and information searching, radically transforming traditional business channels and value networks. To be competitive and financially viable within the rapidly developing Cultural Tourism sector it is necessary to pursue new ways of providing enhanced, enriched and unique visitor experiences, while also offering value added services at Hill of The O'Neill, Tullaghoge Fort and the development of Dungannon as a historic visitor destination.

The MSW region faces the challenge of attracting visitors inland. Visitors continue to be drawn to the world renowned Causeway coastal route. In 2019 Tourism Northern Ireland launched the 'Embrace the Giant Spirit' brand. A significant objective of this initiative, was to ensure greater dispersal of the tourism offering across Northern Ireland. The growth of the industry increased more rapidly than anticipated with NI "welcoming 5.3 million visitors in 2019 who spent an unprecedented £1 billion".

In addition, there has also been a greater demand from tour operators for new experiences and attractions in Northern Ireland. Mid Ulster and the wider MSW region is rich in archaeological, heritage and cultural tourism. Through closer collaborative working investment in the growth and development of these prestigious historical assets, and the implementation of immersive digital technologies will create a world class visitor destination. This transformation will deliver a competitive heritage offering and become a critical economic driver in rejuvenating Hill of The O'Neill, Tullaghoge Fort and Dungannon town.

OPPORTUNITIES

A key strand within the Mid Ulster District Council Tourism Strategy is archaeological sites, history and heritage. The strategy highlights that “*Mid Ulster is the only place to appreciate the history and importance of the O’Neill’s and the Flight of the Earls, while also being at the centre of the C17th plantation movement*”. The strategy recognises the uniqueness of the district to exploit the history of the O’Neill’s, the Flight of the Earls, and the development of the plantations offering a significant and compelling tourism proposition, exploitation of which will give not only Mid Ulster but the entire MSW region significant competitive advantage.

In 2016 there were 7.3 million visits to heritage attractions in Northern Ireland, including historic properties, museums and art galleries, visitor and heritage centres, workplaces and places of worship (Source: NISRA). When we invest in heritage we support business growth, increase tourism, attract new business and create jobs. UK studies show that the historic environment offers a high return on investment. Each £1 invested generates up to £1.60 of additional economic activity over a ten-year period.

Since 2017, both Hill of The O’Neill and Tullaghoge Fort have witnessed limited growth in visitor numbers (see below). Significant investment in the heritage sites proposed, through the use of immersive and innovative digital technologies, has the ability to radically transform the potential of the unique heritage offering within the region, increase visitor numbers and spend, and establish the region as a national and international heritage and cultural tourism destination.

Visitor numbers to Tullaghoge Fort

2017 (Jan-Dec)	12,000
2018 (Jan –Dec)	11,213
2019 (Jan –Dec)	10,778
2020 (Jan-Dec)	13,989

Paying Visitor Numbers to Hill of The O Neill

2016/17 (April-March)	49,546
2017/18 (April-March)	84,645
2018/19 (April-March)	55,861
2019/20 (April-March)	52,954

The proposed interventions at the sites will contribute significantly to both profit generation and economic growth for the MSW region heritage tourism sector. Studies have shown that if “visitors have a better experience using AR, they are likely to stay longer which would increase their likelihood of spending more money in the region. In turn, this would create a better reputation, broadening the target market, while attracting more visitors, increasing ticket sales and use of local infrastructure, as well as creating more tourism spend to invest back into the area”.

Key Economic Benefits of Heritage Tourism

- Heritage tourism is a vital part of the UK economy. In 2015, domestic and international tourists made 192 million trips to visit the UK’s cultural, historic and natural assets. They spent £17.5 billion while doing so.

- The heritage tourism sector itself generated an £8.8 billion gross value added contribution to UK GDP and 191,000 jobs.
- In Northern Ireland heritage tourism supported gross value added contributions to GDP of up to £1 billion.
- In terms of share, natural and non-natural heritage attractions made similar contributions to the UK economy, although average spend is slightly higher for non-natural attractions.
- Heritage tourism is high-value. Relative to all tourists on holiday and visiting friends and relatives, those visiting heritage attractions are more likely to be overseas visitors, who spend on average £560 per trip, or domestic overnight visitors, who spend on average £210 per trip, rather than domestic day visitors who spend circa £35 per trip.
- The heritage tourism sector also supports jobs throughout its supply chain by purchasing inputs of goods and services.
- Wage payments made by the heritage tourism sector and its suppliers support additional economic activity and jobs.

THE VISION

Our vision is to create a strong unique heritage proposition within the sector that will elevate the historic townscape of Dungannon and two of the most strategically important sites in Ireland; Hill of The O'Neill and Tullaghoge Fort, into an unrivalled world class tourism attraction and destination. This will be achieved through:

- introduction of interactive sculptural pieces;
- location specific innovative and interactive lighting solutions to connect the visitor to Hill of The O'Neill, Tullaghoge Fort and the town of Dungannon;
- enhanced product development to include for example innovative technologically driven public events and performances;
- creation of a strong infrastructure, and technologically advanced and connected day and evening visitor experiences;
- providing visitors with the full panoptic experiences across the vast swathes of surrounding lands;
- provision of new, improved and repurposed enabling infrastructure to realise the full potential of the historic locations including for example roads, public transport, utilities, parking, active travel and signage;
- an array of immersive and social experiences tailored to suit a broad range of groupings and ages.

Through these interdependent interventions we will extensively enhance the tourism offering within the MSW region which will appeal to the culturally curious market including visitors from: Northern Ireland, Ireland and beyond. In addition, these developments will act as substantial economic drivers of growth, increase competitiveness, market share and significantly grow GVA. It is anticipated that the interventions proposed will increase current visitor numbers and spend in the region tenfold over the first five-year period.

WHAT WE ARE GOING TO DO

4. Implementation of state of the art digital solutions

Installation and further extension of innovative and digitised exhibition offering at Hill of the O'Neill and Tullaghoge Fort.

Development of AV filming with cutting edge special effects at Hill of The O'Neill and Tullaghoge Fort, transporting the visitor back to a time when Chieftains ruled Ireland.

Development of AR immersive technologies - Deep frame technology, including AR APP technology that signposts visitors to areas throughout the MSW region, including AR enhanced fixed binocular stations that spans across the lands ruled by the O'Neill dynasty.

We seek to create state of the art attractions that combine a suite of immersive soundscapes and lightscapes to link Dungannon Town to the Hill of The O'Neill. Multi-screen projections, physical props and structures, 360 degree projections and Augmented Reality (AR) portals will enable visitors to delve into our complex history through an innovative, imaginative, inspiring, engaging and fully immersive experience. An experience that connects the heritage sites of Tullaghoge Fort, Hill of The O'Neill and the town of Dungannon to encourage the visitor to explore the townscape, the architecture and the history associated with the buildings. These interventions will take visitors through a journey; one that is unique to the region and pushes the boundaries of traditional heritage attraction experiences, immersing them in this significant period of Irish history. This proposition can equally be expanded to benefit the entire MSW region with various linkages to notable connected sites to the story of The O'Neill's and the Clans of Ulster, notably the site of the Battle of The Yellow Ford in Armagh, Enniskillen Castle and the ancient O'Neill crowning site at Dun Ruadh which lies on the border between Mid Ulster District Council and Fermanagh and Omagh District Council.

5. Product Development

Removal of telecommunications mast located at Hill of The O'Neill

During the Troubles, the site of Hill of the O'Neill was used as an Army base under the control of the Ministry of Defence, at which time a telecommunications mast was erected on the historic site. Despite the fact that the site is no longer used as a military installation, the telecommunications mast has remained and continues to be used by telecomms providers and as a transmitter for local emergency services. The mast is an imposing structure that dominates both the heritage site and the wider landscape of Dungannon Town Centre and significantly



detracts from the visitor experience (as can be seen from attached image). The intervention proposed will require the mast and the metal walkways onsite to be removed, thus ensuring that the aesthetics and visitor experience of this location is greatly enhanced. A significant proposition for development will be the replacement of the mast with a site specific interactive sculptural piece and viewing platform that will connect the site to the town centre of Dungannon and provide visitors with a focal point in its own right, but also provide visitors with unrivalled views of seven counties that was once ruled by the O'Neill dynasty at the height of their reign as Chieftains of Tír Eoghain and High Kings of Ulster.

Unearthing the 16th century tower house remains

The Channel 4 *Time Team* television programme visited the site in 2007, during which time a large area of the site was excavated and which uncovered the walls of O'Neill's medieval tower house, surrounded by a section of wall belonging to the military fort that was constructed by Arthur Chichester after he gained possession of the hill fort in the early 17th century. This important historical feature will be re-exposed and covered with a transparent walking surface allowing visitors to view these significant archaeological structure underfoot. The feature will also be enhanced through the use of AR technology to enhance the presentation of the archaeology that has remained unseen for in excess of 400 years.

Art sculptures at Tullaghoge Fort and Hill of The O'Neill

The creation of two interactive sculptural art pieces developed to reflect the historical significance of both sites. These sculptural pieces will be further enhanced through the use of augmented reality solutions and will connect the story of each site location as well as linking to the heritage town of Dungannon.

Creation of C16th Gaelic Irish Wattle and Daub dwelling

There is growing emphasis and demand to create authentic tourism experiences where the visitor can take part and feel fully immersed in history. The creation of a native Irish dwelling provides an imaginative and compelling experience, allowing us to expand our appeal and market share to include Aspiring Families (TNI). This will be augmented through the use of living history digital solutions to recreate the sight, sounds and smells of a 16th Century dwelling, contributing to a unique and memorable visitor experience. As the domestic market will be a key component for the success of the tourism sector in Northern Ireland moving forward, by extending our target market into this core segment will present additional opportunities to drive continued and sustained growth. This will also support and enhance existing education programme provision making it more attractive to schools throughout Ireland to visit The Hill of The O'Neill, Tullaghoge Fort and Dungannon Town.

Creation of Educational Resource Area at Tullaghoge Fort

This resource will create the capacity to offer a year round educational programme as well as enhanced visitor experience through the use of innovative and immersive digital technologies to convey the history of the site in an engaging and fully immersive manner and connect Tullaghoge Fort to the Hill of The O'Neill and Dungannon town.

Development of heritage townscape

The cumulative interventions will stimulate and support the wider economic regeneration of Dungannon by enhancing its distinctive historic character. Through the use of new innovative technologies such as smart, sustainable lighting systems and innovative digital solutions we will connect the historic hill to the town centre to increase awareness of the rich built and cultural heritage of Dungannon. Thus depicting how the Ulster Plantation impacted upon the architecture and creation of Dungannon town as we know it today.

6. Enhancement of tourism infrastructure

Refurbishment of the events space at Hill of The O'Neill

The Events Space is located on Hill of The O'Neill and has capacity for 1200 people. Unique in its architecture, it includes a 360 degree viewing tower, meeting room and large outdoor auditorium. It does however have seasonal restrictions, as it is primarily an outdoor venue, and many of the events delivered are largely dependent on weather conditions.

The enhancement of this space, through the creation of immersive interactive LED touch screen walls that will relay the history of the O'Neill dynasty, the Flight of the Earls and the plantation of Ulster period to the visitor, will also enable large scale indoor events to be staged. Thereby acting as a key economic driver and catalyst for the regeneration of the area, creating jobs, boosting both the daytime and night time economy and escalating the tourism infrastructure and offering to an international level.

Restoration of historic buildings connected to Dungannon Heritage (Longer Term Ambition)

As a part of our longer term ambitions we will seek to acquire and/or partner with private sector to reimagine key historic buildings located in Dungannon centre to further enhance the historic prominence of the town which could be developed to create boutique style accommodation and/or other complimentary facilities. The benefits from the restoration and repurposing of other historic buildings within Northern Ireland is demonstrated by examples such as Titanic Drawing rooms (Titanic Hotel) and Northern Counties building (Bishops Gate Hotel). This intervention would act as a significant catalyst for the future development of the area, creating long term benefits

in terms of confidence building, economic development, and stimulation of private sector investment, job creation, and regeneration of Dungannon.

CONCLUSION

The O'Neill story is at the centre of Irish and European history. It has been included in the Tourism NI brand for Northern Ireland 'Embrace A Giant Spirit' as a unique authentic, experience. The MSW region has significant competitive advantage in terms of heritage and the ability to exploit the story of The O'Neill's, the Flight of the Earls and the Plantation of Ulster. This strong proposition enhances the competitiveness of the area as it allows the visitor to understand this significant period in Irish history.

Significant investment is required to improve the infrastructure, innovate and enhance the visitor experience to compete in a highly, competitive market place. Through the development of this innovative and exciting proposition MSW will foster greater partnerships across the region and further build upon the story and the historic heritage offering at Hill of The O'Neill and Tullaghoge Fort through digital and immersive technologies, product development and enhanced infrastructure. Delivering on this ambitious proposition will require partnership working at all levels including Mid Ulster District Council, DFC Historic Environment Division, NI Environment Agency, Dungannon Town Centre Forum, businesses etc.

ARMAGH CITY REINVIGORATION

This intervention focuses on the need to significantly invest in MSW physical and digital infrastructure, with targeted investment in tourism hubs, to improve the region's competitiveness, increasing market share and growing GVA.

The City of Armagh is set within a picturesque landscape of drumlins, characteristic of county Armagh. Armagh is Ireland's oldest city, with evidence of human settlement dating back 6,500 years. In early history, Navan Fort, on the west of the City, was seat to the kings of Ulster. Arguably, Armagh's defining moment occurred when St. Patrick arrived in 445 AD, establishing a principal church on a hilltop.

Due to the importance of place, Armagh became an academic centre with educational institutions including the Public Library in 1771, the Armagh Observatory in 1790 and much later the Planetarium in 1968.

For these reasons, Armagh City is recognised as one of the key tourism hubs in Northern Ireland, and a Tier 1 priority in the Council's Tourism Strategy 2017-2022. With a wealth of heritage buildings, two magnificent cathedrals, museums and libraries, an observatory and planetarium and beautiful green spaces, there is much to admire about this ancient city.

Armagh has previously benefited from investment in public realm schemes and a number of heritage protection and preservation projects, including the current Townscape Heritage programme. Recent investments in the Southern Regional College and Market Place Theatre & Arts Centre provides state of the art facilities which will boost the arts, educational and evening economy sectors.

Much work remains to be done to maximise the tourism potential of Armagh City as a result of a growing tourism economy in Northern Ireland, and there is much economic benefit that can be derived. The time is right to invest in projects of scale in order to provide more coherent and welcoming tourism destinations for visitors leading to further investment by the private sector and a growth in GVA from a relatively low base.

This project centres on the reinvigoration of Armagh City through a number of interventions including investment in new digital technologies as well as enabling infrastructure. Cognisance will be taken of complementary interventions proposed for inclusion in the Mid South West Region Growth Deal including the 'Transforming our High Streets' proposal, delivery of the A28 Armagh East Link and the development of the Armagh Gaol.

BACKGROUND

The MSW Strategy clearly articulates the challenges faced by the MSW region in terms of a declining share of overnight visitors to NI; though the converse to that is tourism to NI had increased significantly between 2013 and 2018 so the market to Northern Ireland does exist. Northern Ireland has experienced significantly less growth in GVA than the Republic of Ireland. A key part of Tourism NI's strategy to overcome this is to grow tourism in the regions across Northern Ireland. Armagh has been identified by Tourism NI as a City with significant growth potential. Attracting a greater share of tourism to NI is about providing attractive, inspiring, safe, welcoming, interesting, authentic places to visit, stay and enjoy. The core of that is in Armagh – it is now about shaping and honing that offer to become a viable longer term proposition.

As per above, there has been significant investment in the attractions, hotel and wider accommodation product in other regions in Northern Ireland. Similar levels of investment intervention in MSW have not taken place or not to the same degree with private sector investment more prevalent in larger urban areas compared with the MSW region.

Armagh City is also off the key tourism route in Ireland which tends to focus on the coast, which has made attracting visitors inland more difficult.

THE OPPORTUNITY

The opportunity exists to focus investment in Armagh City through a series of direct interventions and joint working with the private sector. These interventions will act as a pump-prime and a catalyst to leverage additional investment from the private sector and other stakeholders across health, leisure, hospitality and the evening economy sectors all of which will be complemented by an animation programme to draw visitors to the city. This integrated programme of investment will demonstrate the regional significance of Armagh City as a destination for both visitors and its citizens and will be fundamental to its future vibrancy and longer term sustainability.

THE VISION

The Armagh Masterplan sets out the following vision;

“The historic City of Armagh will flourish as a lively and attractive place in which to live, work and visit. Known far and wide as the cultural and religious capital of the island, the city's cherished buildings, streets and spaces will provide the fine backdrop to a forward-thinking European destination. Excellent amenities for residents, businesses and visitors, strengthened by improved environment and connectivity will underpin the success of a creative, friendly and people orientated City Centre.”

In more recent times the Armagh City, Banbridge and Craigavon Borough Council Tourism Strategy articulated the following vision:

“to be a market leading cultural tourism destination in Ireland by 2022”.

WHAT WE ARE GOING TO DO

We are going to develop and deliver a series of interventions, including through private sector partnerships, to reinvigorate Armagh City as a destination for visitors and residents to enjoy, and as a place for businesses to invest in.

Some of the key interventions include:

- Investment in the city's vacant building stock to create quality accommodation in line with other MSW pillars and priorities;
- Undertake restoration works at the majestic Mall, a fabulous green space located right in the heart of the city;
- Improve navigation and orientation in the city through investment in welcome, signage and digital infrastructures and in the creation of interesting linkages between places of leisure, living, recreation and working;
- Implement a city wide innovate lighting scheme which will literally shine a light on the city's beautiful streetscapes, landmark buildings and spaces many of which are Listed to illuminate the city's Conservation Area and enhance the most surprising and delightful of views;
- Implement the city cycling strategy to encourage active travel by providing sustainable means of connecting neighbourhoods, moving residents and visitors across the city and beyond to the Greenways on the outskirts of the urban area;
- Implement a pedestrianisation scheme in Market Street to create a safe and welcome environment for all, opening up traditional alleyways thus enhancing visitor flows;
- Invest in key heritage buildings across the city in order to attract new health, recreation and business tenants;
- Initiatives which tell the story of the City and move people across the City, this could include a reimagined museum offering and evening economy initiatives;
- Infrastructure projects including, for example, a Coach Park for Armagh and improved car parking as well as opportunities for Park & Share provision; and
- Investment in the Navan Centre, working alongside Historic Environment Division to create an attractive complementary visitor proposition for the city.

Bringing forward the A28 Armagh East Link will alleviate traffic congestion and pollution greatly enhancing the impact of the interventions outlined above.

CONCLUSION

Armagh is Ireland's oldest City, with a unique history and heritage that has been acknowledged by Tourism Northern Ireland and Tourism Ireland as a place of significance with considerable tourism potential.

However, from a tourism perspective there are infrastructure challenges and significant investment is required to fully realise the City's potential and its ability to

compete on an international stage as a tourism destination. Investment on the scale required will give the private sector confidence to invest in the City and ultimately have an enduring impact on GVA.

COOKSTOWN HEALTH AND CARE HUB

A healthy community is a productive community. Improved health and wellbeing indicators are linked to improved economic indicators. While the development set out in this paper relates mainly to the provision of innovative approaches to the delivery of health and social care services for the Mid South West Region, the benefits will be seen far beyond the positive health impact on the population. Given our ageing population and expected slowdown in population growth, increasing productivity will become our most important driver for success (as reflected in both the UK and NI Industrial Strategies). It is important to recognise health and social care as an 'economic driver' over and above being a core service providing sector in MSW. Cookstown Health and Care Hub will be designed to achieve an integrated approach to the delivery of primary services in co-locating health and public services within one site, but more importantly adopting transformative approaches to health innovation, addressing regional imbalances and ultimately driving growth and productivity in the Mid South West Region. The proposed development will be enabled by innovative working practices and technology, acting as a test bed for new and developing technologies in healthcare.

BACKGROUND

The Mid South West Region comprises Armagh City, Banbridge and Craigavon Borough Council, Fermanagh and Omagh District Council and Mid Ulster District Council and is a unique collaboration formed in 2018 with the sole purpose of driving economic growth and boosting productivity. The Mid South West Region of Northern Ireland has a large rural hinterland and has struggled historically with access to primary and acute healthcare services.

Cookstown is an historic market town, the second largest of the five towns within the Mid Ulster District Council area. Located between the Sperrin mountain range and stretching to the shores of Lough Neagh, the former District Council of Cookstown comprised a population of 38,952, accounting for just under 30% of the Mid Ulster District total. It is a predominantly rural area, in line with the overall Mid Ulster profile approximately two thirds of the District's population are located outside the town. Consequently, access to services remains an ongoing issue for its rural dwellers.

The population of the Cookstown area has grown by 19.5% in the 18 years to 2019. Over the 25 years, to 2043 the population is expected to increase by 7%. However, the biggest change is expected to be in the over 65 age bracket, with an expected increase of 74.8% on over 65s and 109.8% in over 75s. This is significantly higher

than the NI average of 56.2% for over 65 and 89.1% for over 75. Mid Ulster residents (and most especially Cookstown) are geographically located farther away from acute hospitals than the majority of NI residents, and ambulance response times have been recorded as 25 minutes longer than the NI average. The quality of the road infrastructure (poor terrain and narrow roads), particularly in the rurally isolated areas, has an undeniable impact on access to primary and acute health care services. People living/working in these areas should not be penalised because of their rurality, underinvestment in infrastructure or access to innovative health care services that are already in place in other parts of the region and wider UK.

Cookstown includes one of the most deprived areas in NI (in the top 20% based on multiple deprivation measures and 32 of the 59 areas within Mid Ulster are included in the top 20% of most deprived areas in NI. The area has a higher than average prevalence rate of heart disease, hypertension and asthma. In addition, none of the top 20% of least deprived areas are in the Cookstown area. Seven of the most deprived areas in terms of Access to Services are in the Cookstown LGD area.

While recent years have seen some slight improvements in the health prospects of Cookstown/ Mid Ulster residents, significant inequalities remain in a number of areas and some health outcomes remain worse than the NI average, as outlined in the Department of Health (DoH) Health Inequalities (Annual Report 2020):

- Circulatory-related death rate Under 75s: the NI rate stands at 72/100,000 while the rate for Mid Ulster's deprived areas is 86.
- Cancer U75s Deaths: NI's level is 147 /100,000 with Mid Ulster's deprived areas having decreased from a previous high of 170 to 161.
- Standardised Prescription Rate – Statins (Prescriptions/1000) the NI rate shows a reduction to this trend at 167/1000, however, Mid Ulster's deprived areas remain high at 197/1000.
- Male life expectancy in Mid Ulster's LGD's most deprived areas was 77.3 years, 2.0 years less than the NI LGD average of 79.3 years.

It is clear that poor health significantly impacts on an individual's ability to work. Analysis by the Office of National Statistics in February 2019, demonstrated that of the 16-64 year old cohort in the UK who were economically inactive and had never had paid employment, 440,000 had a physical or mental condition which impacted on their ability to carry out day to day activities. In addition, there are people who do work but their working life is interrupted or cut short by short term or long term illness. Absenteeism due to sickness remains a challenging issue for employers and clearly impacts on productivity. Research and data collection focuses on the impact of health inequalities and the wider social determinants of health and wellbeing such as poverty, lack of employment, poor housing, fuel poverty and lack of educational attainment on health outcomes. However, it can also be said that the reverse is the case, that poor health outcomes contribute to lack of economic activity.

Currently Mid Ulster's economically inactive numbers sit at 17,000, equating to 18.4% of the working population; a significant proportion of these are on some level of disability benefit and are long term unemployed, an issue which has affected the District for many years. Increasing the health opportunities for these individuals will

consequently stimulate the re-engagement with the labour market, via accessing employment or training/ education, impacting on increasing economic activity and productivity levels in the District and wider sub-region.

The GP practices in Cookstown currently provide General Medical Services (GMS) and a range of local enhanced services. A number of practices already deliver GP training but it is understood that they would wish to increase this provision if additional capacity becomes available. The practices are currently working from premises which are substantially below the area required for their practice size and there is limited ability to extend to allow expansion of services to meet demand. In addition, the recruitment of new GPs to rural practices in NI is generally challenging due to distance from acute hospital provision, a growing and ageing population, increase in long-term chronic conditions like diabetes, an aging GP workforce and changing expectations of younger doctors.

In order to meet the growing demands of the population of Cookstown and surrounding hinterlands, it is expected that GP practices will need to introduce new and innovative ways of working. In addition, Cookstown is on the periphery of the Northern HSC Trust which presents significant opportunities to develop innovative and digital connections between primary and secondary care and the community and voluntary sector. There are currently no healthy living centres in the Cookstown area.

Technology Innovation

Virtually every aspect of modern life has been, and will continue to be, radically reshaped by innovation and technology – and healthcare is no exception. Sustained advances in computing and the democratisation of information are driving choice and control throughout our daily lives, giving us heightened expectations around digital services. Technology is continually opening up new possibilities for prevention, care and treatment. The Health and Social Care sector (HSC) is a source of technological advancement in clinical practice, however, we have not yet enabled the wholesale transformation of public health services in the UK generally and Northern Ireland specifically, that patients have a right to expect. The way we deliver care remains locked into the service model largely created when the NHS was founded in 1948. NI is exploring a wide range of technology enabled healthcare developments which could be considered within the primary and community care setting, these include:

- Developing a new strategy, platform and contract for Technology Enabled Care (TEC) for remote monitoring, telemedicine and telecare;
- The Primary Care ICT Modernisation Programme, looking at the GP practice management systems and the wider GP IT estate;
- The Digital Pharmacy programme, delivering electronic transmission of prescriptions as well as access to patient data for community pharmacy delivered HSC primary care services;
- Exploring digital tools to improve access to psychological therapies, reflecting on the successes of the 'IAPT' programme in England with referrals from primary care; and
- Technology enabled Vaccine Management System.

THE OPPORTUNITY

The Innovative Service Model

It is recognised that there is an absolute requirement to change the way in which health and social care services are delivered. A core theme of the direction of travel set out in the Minister's Vision 'Health and Wellbeing 2026: Delivering Together' is the importance of the role of the primary and community care sector in delivering a new model of person-centred care. Primary and community care is considered to be the appropriate setting to meet the majority of the health and social care needs of the population and directly contribute to better distribution of health outcomes and enhanced well-being / quality of life, which in turn bring important economic, social and individual benefits to the wider region. The services and resources available within primary and community care have the potential for fewer unnecessary hospitalisations and readmissions, better adherence to treatment, reduction in the number of patients entering into care homes, increased patient satisfaction, health literacy and self-care, greater job satisfaction for health workers and overall improved health outcomes.

The new direction of travel will also create opportunities for the wider independent contractor network (GPs, dentists, pharmacists etc.), supporting practitioners to work collectively through innovative linkages, with access to community services provided in shared facilities. This approach should create the opportunity for greater advancement and efficiencies within integrated care pathways. In addition, this new way of working will provide services to enable local people and community groups to access information and space to support a healthier lifestyle.

The 'No More Silos' strategy was launched after the first wave of Covid-19 infectivity and sets out an HSC model to deliver both same day and same week access to healthcare for the Northern Ireland population. It envisages a level of structured collaboration within HSC and between primary and secondary care which has not been achieved before. This integrated care model would be supported in the development of a health and care hub in Cookstown and allow access to the population of the Mid South West Region of Northern Ireland.

In addition to creating the opportunity for greater efficiencies within integrated care pathways, it is widely acknowledged (as outlined in the Background section above) that people's economic circumstances are influenced by a range of factors including health and well-being. The vision for this proposal is to transform health care provision and in so doing improve the economic outlook of the population of the Cookstown and hinterland area along with the wider MSW Region. Transforming access to health care through innovative approaches and solutions will directly address issues of health inequalities and improve people's life opportunities. A fit, healthy and thriving population will ultimately contribute to economic growth. Whilst it is acknowledged that in the absence of detailed economic modelling it is harder to articulate the economic impact and growth potential for health innovation projects, there is good reason to expect additional economic value and efficiency gains resulting from the hub intervention due to better coordination of available resources,

extensive range of innovative services offered, job growth in local community and additional business activity.

Technology Innovation

The types of innovations to be deployed and tested in this primary and community care environment would create modern experiences for citizens, the best possible outcomes and care, the empowerment and enablement of GPs and multidisciplinary colleagues, and improved efficiency for the service. From the digital perspective this might include:

- Support for people with long-term conditions through improved interoperability of data, mobile monitoring devices and the use of connected home technologies. As we consider the future of these services there are great opportunities from continued exploration of these data feeds into a Digitally Enabled Primary Care hub with multidisciplinary teams using a data driven approach to delivering the best care.
- Virtual consultations / photo based triage technology will bring professional / clinical staff together to triage patients and then consult virtually. Having the technology to link primary care and secondary care specialists is important in rural communities such as Cookstown. For example, live streaming for dermatology and tissue viability conditions with GPs being able to consult with secondary care consultant colleagues which can then move into treatment at a distance, prescribing and monitoring.
- Exploring patient owned personal health records that hold a care plan to incorporate information added by the patient themselves, or their authorised carer - these may also hold data that the patient chooses to share with the HSC. Patients who choose to join a condition monitoring programme will be able to benefit from insights from these data and will be monitored for combinations of symptoms that may indicate clinical events and result in contact from a health adviser or clinician to help the individual stay well.

Enabling Infrastructure

An existing multi-tenant site within the ownership of the Health and Local Government families has been identified. The physical transformation of this site to include the provision of the most digitally advanced infrastructure will enable the vision for the transformative delivery of primary and secondary health care in Cookstown to be realised.

THE VISION / WHAT WE ARE GOING TO DO

The Hub will co-locate a wide range of services across the Community, Mental Health and Learning Disability, Children's and Acute Divisions of the Trust services. The local GP practices will be invited to consider relocating. A new digitally

enhanced facility would enable expansion and development of services delivered locally, for example, diagnostic (radiology, DEXA and ultrasound services), and outpatient services. This would support the Commissioner intention that outpatient consultations for a range of specialities should occur in the community setting where care is closer to home and more cost-effective. The hub would not only provide access to a broad range of health related services for the population of Cookstown, but would be an innovative health care hub for the wider Mid South West region.

The vision for elderly day care services in the Cookstown area is to provide a modern facility that incorporates technologies to support clients that need short term enablement/ rehabilitation rather than the long-term care that is provided currently. This would involve delivery of proactive and progressive programmes, with clients at the end of their intensive programme, supported by the community and voluntary sectors. For Learning Disability clients, the aspiration would be to move away from only a building based model to accommodate the increasing number of people with learning disabilities who are living longer. The future solution will find alternative innovative pathways which are complementary to the building based care. The model will support community based provision with a shared responsibility and colocation across the sectors within the Cookstown area, to support our Learning Disability clients to be economically active.

GP practices would be supported by Multi-Disciplinary Teams (MDTs) through the addition of other health specialists to meet the health and social care demands of the population, for example through the addition of advanced nurse practitioners, practice based pharmacists, first contact physiotherapists, mental health specialists and social workers, with improved access to specialist support. Access to GMS services on a sustainable basis is a priority; the implementation of MDTs will enable expansion of service and extension of capacity for patient contacts, same day appointments and potentially assess and discharge a number of patients without the need for further investigation or referral. Practices are committed to developing triage systems appropriate to making best use of new first line staff and allowing patients direct and co-ordinated access to physios, mental health workers and social workers as part of the wider GP team. This co-ordinated effort will ultimately transform access to health care services and have far reaching impacts for our rural population. The opportunity also exists to develop and deliver services as part of HSC wider commitment to Elective Care Reform. Focus will be placed on prevention and early intervention for holistic care incorporating all aspects mental, physical and social needs. There may be opportunities to include a focus on early intervention, prevention and health promotion to improve health outcomes. Virtual links can also be used to engage with the Community and Voluntary sector through technology providing holistic management of the patient /client. This could include a health and emotional approach via e learning, e.g. virtual relaxation, yoga and exercise classes / inter-generational work with clients.

This model will support the testing of innovative systems as part of developing an approach to delivering services at single point of contact. We are determined to provide robust pathways and links for Mental Health, Social Services and

Community Voluntary Sector such that patients have the best possible access to appropriate health care professionals.

The hub will also allow for opportunities to increase medical student training and could support the planned increase in time spent within primary care by medical students. A number of the GP practices are already training practices but have limited space to support the training requirements of the students. In addition, there are practices who would wish to offer training to students but who have been unable to due to their accommodation constraints. The new hub will provide not only opportunities for medical students in their final years of education but will also allow for opportunities to train students in earlier years of their education, for example it is anticipated that students in the third year of their medical degree will be required to spend additional time in primary care. These students require less independent time with patients but rather require seminar type space where GPs can provide learning experiences. Given the number of GPs in Cookstown, it is expected that this facility could become a high quality training ground for medical students training in both Queens University Belfast and within the new Ulster University School of Medicine at Magee. This is likely to in turn increase the number of medical students wishing to enter into General Practice and in particular to the Cookstown area, supporting the sustainability of services into the future.

There will be opportunities to consider centralising services. For example, the hub may be suitable as a sub centre of excellence for Gait Analysis, were dynamic examination of a person's gait will provide a better diagnosis and treatment plan for a variety of medical conditions that are affected by the foot. The current Trust service is provided in Ballymena Hub but Cookstown Hub could provide a service to its local population. Improved digital technology will allow occupational therapists to assess clients in their own homes virtually.

The goal is to create test beds for health innovations to scale across the region, crucially ensuring that GPs and other primary care organisations are involved from the outset.

CONCLUSION

We will seek to innovate and digitally transform the delivery of GP and other primary care services within Cookstown and the wider Mid South West region. The redevelopment of an existing site will provide the enabling infrastructure to accommodate the physical and digital transformation of health provision in Cookstown and surrounding hinterland areas. The re-location and co-location of the range of services articulated in this paper will be underpinned by innovative approaches to delivery which will address inequalities in access to services and health inequalities in general. Fundamental to this is the premise that a healthier population will be more economically active and contribute more to the wider economy.



BUILDING A HIGH-PERFORMING TOURISM ECONOMY

SPERRINS FUTURE SEARCH AND TOURISM DEVELOPMENT

Iniscarn to Lough Fea Long Distance Route & Slieve Gallion Experience

The Mid South West (MSW) Regional Economic Strategy (RES) identified four main pillars of action including:

1. Future-proofing the skills base
2. Enabling infrastructure
3. Boosting innovation and digital capacity
4. Building a high-performing visitor/tourist economy

The 'Sperrins Tourism Development' intervention will be developed as part of the fourth pillar within the strategy, which is to build a high-performing visitor/tourist economy and capitalise on the region's natural attractions including the wider Sperrin's Landscape.

BACKGROUND

The Mid South West Region area stretches from the Border with Cavan, Monaghan, Donegal and Louth, to the mountains of the Sperrins.

For the purposes of this proposal the area will be defined as the Sperrins AONB and its wider foothills. The Sperrins geographic area covers a total footprint of 1181km² which extends across four of Northern Ireland Council areas, two of which are within the MSW region: Mid Ulster District Council and Fermanagh and Omagh District Council. Whilst Armagh City, Banbridge and Craigavon Borough Council is not within the AONB, it is true to say that the landscape to the north of the ABCBC area, just south of Lough Neagh, is designated as a RAMSAR area and has many similar physical characteristics which are reflective of those associated with the wider Sperrins region, for example:

- Extensive tracts of peatland
- Loss of important natural habitats due to resource extraction
- Geographic isolation
- Underdeveloped Tourism industry

Many of the challenges and opportunities associated with the wider Sperrins region were extensively considered and reviewed by stakeholders and communities as part of the 2018 Sperrins Future Search exercise, and later documented in the follow up report “The Sperrins, Reaching New Heights and Reaching our Potential”. A number of common themes were identified within the report including low infrastructure levels, need for community bottom-up engagement and no overall management structure. Specific issues and challenges associated with tourism sector were also highlighted. These included:

- Physically isolated;
- Demand for building materials and negative impact on landscape;
- Loss of natural and built heritage and possible linked tourism product;
- Area not branded as a tourism destination;
- Appearance of villages need improved;
- No management structures;
- Private sector tourism product has declined;
- Need to link with Tourism NI plan and develop strong experiential tourism.

MSW is aware that over the last number of years there has been a sustained growth in experiential travel, with people preferring to spend their holidays seeking out more meaningful and personal experiences in beautiful locations that are often perceived as 'off the beaten track', rather than in conventional or popular holiday destinations.

This growth is even more evident considering the COVID-19 pandemic which has caused a significant decline in international travel and an increased demand for outdoor countryside access experiences closer to home. Travel is now more about appreciating the way of life hidden gems like the Sperrin Mountains can offer; learning about local history, cultural and natural landscapes and embarking on voyages of self-discovery that will stay with the person long after the holiday has ended.

Recreational tourism continues to be an important growth area, and the natural resources available to us in Northern Ireland offers significant potential to avail of the economic benefits that this type of tourism can bring to rural areas. The development of (i) the new Slieve Gallion to Lough Fea Long Distance Route (LDR); and (ii) Southern Sperrins Route (Gortin, Rousky, Creggan, Broughderg) will further open the Sperrins to an international market and maximise the use and the potential of existing walking trails such as Hudy's Way and Sli an Carn, by adding value to the existing walks and helping to entice visitors to stay in the local area for longer.

The Sperrin Mountains provide the setting for a highly distinctive landscape, containing a rich tapestry of both spatially extensive and diverse built, cultural and natural heritage assets many of which remain unknown to the wider public and underutilised as a tourism resource. The Sperrins remain a highly inaccessible landscape, more so than many other similar landscapes in the UK and Ireland, with only short to medium distance access routes developed by local communities as a localised recreational resource. However, it is this inaccessibility, extensiveness and diversity of the

resource base that lends itself to the provision of opportunities for creating a wide range of outdoor recreation, tourism, wellbeing and heritage engagement activities for both the local population and for an increasing number of visitors to the area.

THE OPPORTUNITY FOR THE SPERRINS

In recent times there has been strong public sector tourism products and experiences developed within the Mid-South West Region area. Examples of these include the Seamus Heaney Homeplace and OM Dark Sky Park and Observatory, the Navan Centre and Fort and Oxford Island and the Gortin Glens and the Ulster American Folk Park. However, one large aspect of the wider area is its connection to the Sperrins mountain landscape and its wider foothills. It is the opportunity stemming from this landscape's rich built, cultural, and natural heritage that will be exploited and developed as part of the MSW Regional Economic Strategy and this intervention. The following is the main opportunities that have been identified both within the Sperrins Future Search and other associated council tourism plans and strategies. These include:

Opportunities

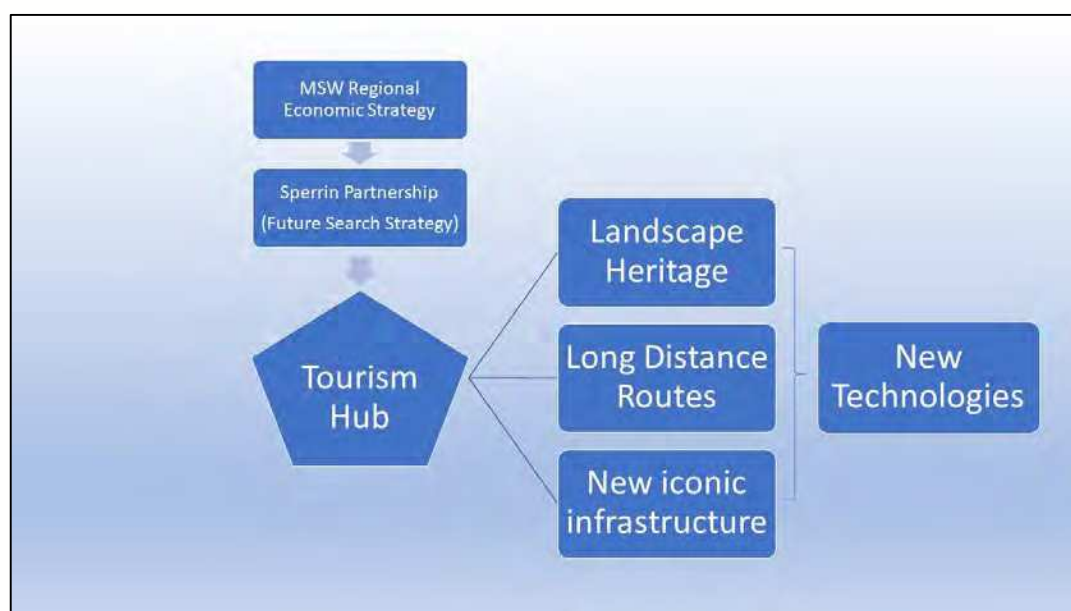
- Build on the areas rich natural built and cultural heritage.
- Brand and market the wider area as a destination;
- Connect new public sector tourism product developments with tourism private sector and add new experiential tourism products;
- Improve the environment of local small towns and villages;
- Built on and develop a new management structure;
- Develop digital capacity and ensure quality training.

Longer Distance Routes (LDR) can provide valuable opportunities for recreation, tourism and active travel, attract significant use by walkers, cyclists, horse riders and disabled users, and help to achieve a range of public policy outcomes. The effective provision, management and marketing of LDRs and their active use by local residents or visitors, can contribute to the 'delivery' of a wide range of national legislation, strategies and policies. In particular, they can help to achieve many of the policy outcomes relating to the NI Assembly's 'New Decade, New Approach' and Council's Community and Tourism Plans. When developed in combination with local heritage, the arts and the bespoke business sector, LDR's can and do make a significant contribution to building a high-performing visitor/tourist economy. For MSW, it is Slieve Gallion, its geography and its wider heritage landscape and the Southern Sperrins activities and culture that now provides an exciting opportunity to contribute to Pillar 4 of the MSW RES '*Building a high-performing visitor/tourist economy to boost existing and new tourism businesses and products*' through the development and creation of a new LDR that will draw on the areas rich natural, built and cultural heritage and allow the Sperrins Partnership Project (Future Search) to brand and market the wider area as a visitor destination.

The Sperrins Partnership Project (previously Sperrins Future Search) identified the potential of tourism as an economic driver and highlighted the need for increased tourism product development and strategic leadership operating on a vision centred

on *'Think big, Think iconic, Think innovation'*. A resulting strategic outcome has been developed from the need to develop tourism hubs that are physically and/or thematically linked to extend and broaden the visitor offering and subsequently present a greater economic value to the area.

Key tourism development opportunities associated with these hubs draw on the combined interaction between sustainable utilisation of heritage assets, recreation & outdoor programming, development of bespoke, iconic infrastructure, and, through the adoption of new technologies, create a subregional tourism attractor that would engage visitors with the landscape. In combination, these would provide a framework for the establishment of a high quality, unique, geographically referenced hub that would act as a focal point for product marketing, regional promotion and visitor destination planning for the region. A recent example of this is the new proposed Sperrin Sculpture Project which thematically links different visitor hubs in the Sperrins extending the visitor experience, duration of stay and increasing visitor spend.



It is anticipated that in addition to the Slieve Gallion to Lough Fea LDR and Southern Sperrins Route, that substantial other investment will be required to realise the aspirations of the Sperrins Partnership Project. Other projects will follow later as the outworking's of the Sperrins Partnership Project plans are developed.

Tourism demand for LDR's

As well as being a popular activity among the domestic population, walking is one of the key activities that attract overseas tourists to Ireland and N. Ireland. Based on the Survey of Overseas Travellers (SOT) data available from Fáilte Ireland, the recent trends in the number of overseas tourists that have engaged in walking shows an average of 680,000 participants annually engaging in walking/hiking between 2008 and 2018. Overseas visitors who engaged in walking also engaged in a variety of different types of walking. For example: 58% participated in walking on pathways; 42% participated in walking on roads; 41% engaged in cross-country walks; 35% took part in hill walks; 18% used waymarked ways; and 11% used looped walks. About 8%,

meanwhile, engaged in walking that was accompanied by a guide. Furthermore, it should be noted that 366,000 overseas holidaymakers in 2014, and 245,000 holidaymakers in 2018, stated that hiking and hillwalking was an important factor in their decision to holiday in Ireland. Also, the number of overseas visitors and holidaymakers who walked off-road for 5 km or more in 2014 using recreational trails or similar product, totalled 388,000.

A VISION FOR THE SPERRINS

The vision for this intervention should reflect on the need to expand the local economy within the MSW Region area by helping boost existing and new tourism businesses and products whilst reflecting the challenges and opportunities provided by the character and heritage of the Sperrins landscape. As such the vision of this intervention is described as follows:

“Inspire and empower existing and new tourism businesses to build on the opportunities within the wider Sperrins area and contribute to expanding the local economy”

Slieve Gallion is the most easterly of the Sperrins giving definition to what is beyond for all those who gaze across Lough Neagh from the populous east. Rising to a height of 528m at Grid Reference: H79873 87810, it can be currently accessed from an off road trail through Iniscarn Forest to a communications mast and cairn on the basalt mountain top - the burial place of Callan, the grandson of Colla Uais, a figure from pre-history named as High King of Ireland. Views of the surrounding region include Lough Neagh, the Antrim plateau in the distance and northwards to Lough Foyle and Donegal. The mountain is geological diverse, formed from igneous basalts and granites to create a volcanic plug. The landscape comprises blanket bog which extends towards Lough Fea in the west and intermittent coniferous forest plantations which add to the arresting vistas and confirms the panorama as an area of "High Scenic Value". There is significant evidence to suggest that the area has been occupied since the late Iron / Early Bronze Ages with the landscape hosting a range of archaeological features including standing stones, cairns and souterrains.

The Economic Value of Walking and LDR's – An Overview

Recreational walking participation in N. Ireland has risen from 36% in 2011 to 49% in 2017. Such an increase has resulted in rises in consumer expenditure in terms of sport equipment and sportswear; this indirectly pays back the public investment through greater public receipts from VAT on outdoors spending. In a study carried out by Sheffield Hallam University on behalf of Sport NI in 2017, data evidenced a considerable increase in the economic impact of outdoor recreation in Northern Ireland with a generated GVA exceeding £131m, representing an increase of 28% based on

the 2011 baseline. This has been brought about by improvements in the NI economy, greater participation rates, especially in recreational walking (Kokolakakis, 2019)¹.

An Irish user survey carried out as part of a 2010 study by Fitzpatrick Associates into 'walker spend' estimated that the average spend per visit at that time was €14.91. This typically included spend on items such as food, drink and (to a much lesser extent) accommodation, local crafts for tourists etc. While many users would have spent less than this amount, many others would have spent more, and in some cases considerably more (e.g., tourists who spend on accommodation). A more recent study has indicated that this spend has increased to an average €15.26 per person suggesting a total direct combined expenditure on visits to recreational trails of €198,484,076 per annum in the Republic of Ireland.

There are no robust estimates available for the number of jobs supported by expenditure on LDR's. Furthermore, the number of jobs supported from a given level of expenditure will also vary in individual cases, e.g., because of differences in the share of local and non-local users, or as a result of "leakages" out of the local economy. However, for illustrative purposes we can make an assumption that every £50,000 in expenditure supports one FTE job.

Key Economic Benefits of LDR's

- Quality LDR's attract high numbers of visitors who on average spend £11 to £14 in the local economy;
- LDR's increase the value of nearby properties;
- Trails boost spending at local businesses. Communities along trails benefit from the influx of visitors going to restaurants, shops and other retail establishments. On longer trails, hotels, bed and breakfasts, and outdoor outfitters benefit;
- Trails make communities more attractive places to live. When considering where to move, homebuyers rank walking and biking paths as one of the most important features of a new community;
- Trails influence business location and relocation decisions. Companies often choose to locate in communities that offer a high level of amenities to employees as a means of attracting and retaining top-level workers. Trails can make communities attractive to businesses looking to expand or relocate both because of the amenities they offer to employees and the opportunities they offer to cater to trail visitors;
- Trails reduce medical costs by encouraging exercise and other healthy outdoor activities;
- Trails revitalise areas suffering from multiple deprivation;
- Trails provide low or no-cost recreation to families with low costs relative to other recreational services that could be provided by government;

- These benefits represent a huge economic return on the money invested into LDR projects. The costs of land acquisition for trails, trail construction and maintenance are far outweighed by the economic benefits generated by trails. These costs can also be offset through permissive path agreements, use of PROW's and partnership agreements with other public sector bodies e.g., Forest Service.

Case Study - Walking in Scotland

Outdoor visits in Scotland, most of which involve walking or cycling, generate around £2.6 billion in expenditure per annum, with an average spend per visit of £9 (including those who spend nothing). Hillwalking makes a significant contribution to the Scottish economy with estimated annual expenditure in excess of £65 million. VisitScotland estimates that the annual economic impact of walking tourism is £1.6 billion. On the Scottish Canals towpath network, total visitor expenditure is estimated to be £29.3 million per annum. This supports 544 tourism-related jobs and £12.0 million in associated GVA. Activities undertaken on and around Scottish canals are estimated to generate a minimum of £11 million in direct tourism benefits and £23 million in indirect benefits. The estimated economic impact of trips taken for recreational purposes is £85 million of expenditure in the local economies. It is estimated that the £2 million cost of creating the John Muir Way generates £16.3 million in direct expenditure and create or safeguard 700 FTE jobs. In addition, it is estimated that £8.8 million of direct visitor expenditure and 384 FTE jobs could be generated from increased day use. The Fife Coastal Path supports an estimated 800 – 900 FTE jobs in Fife, with annual net expenditure associated with the route estimated between £24m and £29m annually.

WHAT WE ARE GOING TO DO

Build on the areas rich natural built and cultural heritage.

As part of a project scoping exercise, Mid Ulster District Council has identified the development of a long-distance looped walking route connecting Iniscarn Forest in the east via Slieve Gallion Mountain to Lough Fea in the west as a viable proposal under the Mid South West Growth Deal Programme. The proposal covers a distance of c. 24.6Km (Figure 1) and aims to connect users with the multifaceted heritage diversity present throughout the development corridor. The scheme will use the geographical and topographical setting of Slieve Gallion to create a gateway feature on top of the Mountain that will celebrate, recognise and bring attention to the Sperrins region. This will take the form of a highly visible and iconic viewing platform, that will act as a landscape marker for the MSW region and will help establish a branded identity and signature that will contribute to capitalising on the region's natural attractions.

In addition to the walking product the proposal includes an iconic viewing platform with Café that will take in the stunning views of the Lough Neagh basin with views extending all the way to the Glens of Antrim, Belfast Hills and the Mourne. This multi-function

purpose tower will act as the starting and finishing point for the long distance route with the augmented landscape experience starting when the visitor enters the cable car, which will bring the visitor to the platform from the service area, at the forest entrance. The platform will also act as an in, or over starting point for the forest experience, which could be a high energy zip line or through forest roller coaster experience. This will take the form of an iconic designed viewing tower which will help establish a branded identity and signature landmark for Slieve Gallion that will contribute to capitalising on the region's natural attractions.

This proposed project will become one of the potential tourism hubs within the Sperrins and specifically offer a family experience to the local and international market. Recent research shows that the adventure & nature tourism propositions are accelerating in terms of market demands, both with the local and international markets. It is also anticipated that post COVID-19 that this trend will continue.

This research also shows that 89% of global consumers say they are more focused on mental health and wellbeing because of COVID-19. (TNI Spark Research Nov 2020)

Fermanagh and Omagh District Council see the development of the Southern Sperrins as connector through a "Greenway" from Omagh to Gortin through tourism hubs from Gortin into Rousky, Creggan and Broughderg with the ambition to link to Lough Fea and Slieve Gallion through activity and cultural experiential activity.

Target Market

In the short term the Council's marketing activities will target the domestic market.

In the short to medium term the Council will target the ROI and subsequently the GB market. Long term we will target the International market.

This project will appeal to the priority segments below. The development of the project has considered each segment's need throughout the process.

Domestically the Council will target the 3 priority segments.

1. Aspiring Families;
2. Natural Quality Seekers; and
3. Social Instagrammers.

In the ROI market the key market segments that this project will target are:

- Active Maximisers;
- Families Seeking a Buzz;
- Open Minded Explorers; and
- Open to Ideas.

In the GB and International market the key market segments that this project will target are:

- Great Escapers; and
- Culturally Curious.

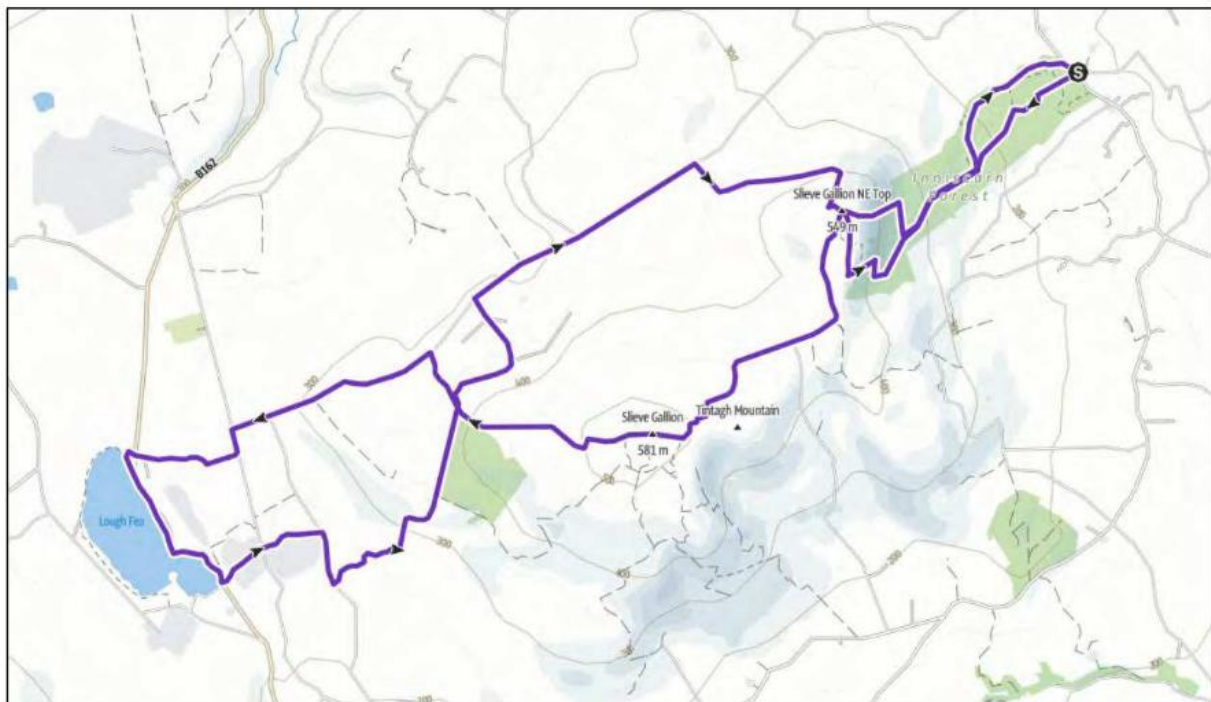


Figure 1: Proposed Iniscarn to Lough Fea LDR (15.33 miles/24.6Km/9hrs 15mins)

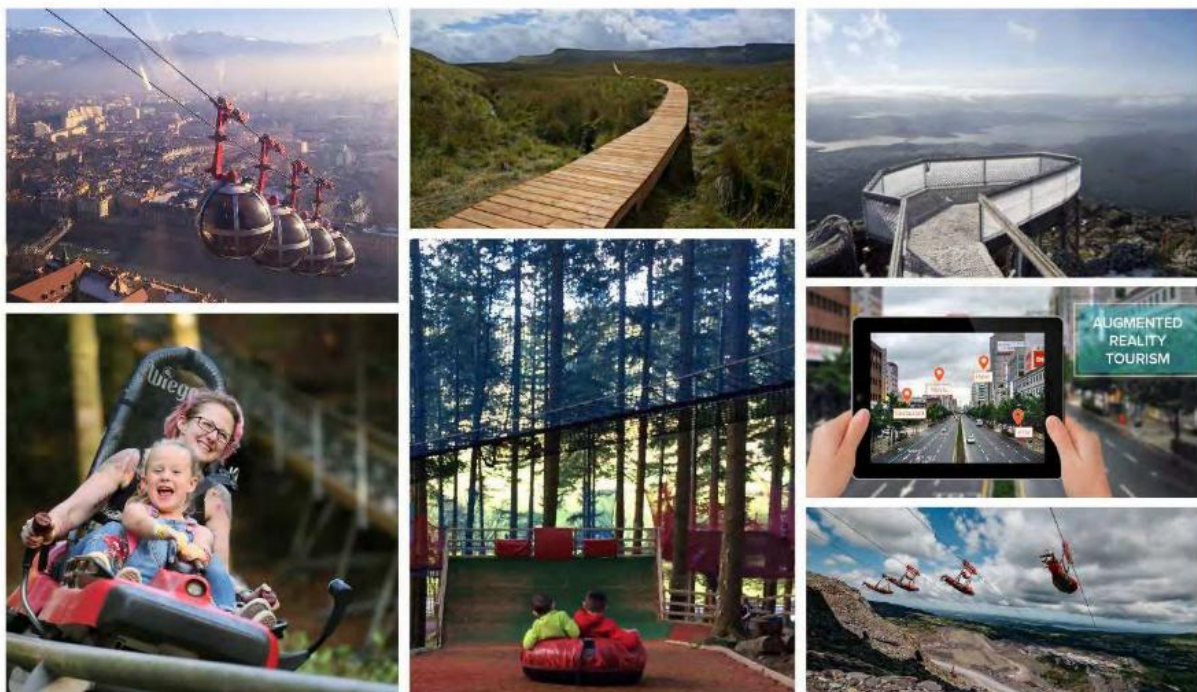


Image 1. Examples of different potential elements of the proposed visitor experience.

CONCLUSION

In conclusion, the actions and outcomes of this intervention will have significant positive impact on addressing the tourism and economic needs of the Sperrins, whilst contributing to its economic expansion and transformation of the wider geographic area.

ULSTER AMERICAN FOLK PARK

Transforming local relevance and international significance

BACKGROUND

Ulster American Folk Park is a unique place that preserves the importance of Ulster people's contribution to establishing modern North America (including Canada), tells compelling stories of Irish emigration and seeks to alter perceptions about emigration through personal stories of discovery.

The Park was established in 1976 and comprises of over 30 original buildings lovingly moved and restored in situ from across Ulster and North America to create the journey through time and locations, including a full-size replica of a migrant ship marking the crossing between the Old and New Worlds. The Park was originally developed around the Mellon House, the birthplace of Thomas Mellon, the founding father of the Mellon banking dynasty.

Visitor guides provide live interpretation across the site including demonstrations of heritage crafts skills such as linen weaving, blacksmithing, candle-making, printing and open-hearth cooking. The outdoor offer is supplemented by an annual programme of events including the popular Bluegrass music festival, an indoor permanent exhibition and a temporary exhibition programme.

THE OPPORTUNITY

Ulster American Folk Park is getting left behind in Northern Ireland's heritage attraction marketplace, as competitors are strengthening their offer for families and international visitors. The museum's visitor numbers are now at their lowest point in two decades. The decline shows no sign of slowing down and is forecast to become even more challenging due to the impact of Covid-19 on overseas markets.

Visitors enjoy a day out at Ulster American Folk Park, but there is lack of engagement with the deeper values which underpin the museum. It is commonplace to hear expressions of warmth towards the museum without any genuine intention to revisit. The site has the most extreme seasonal visitor profile in the National Museums NI group, with the lowest visitation between November and March. The Park and the offer are not seen as particularly family friendly. Learning visits have been declining at dangerous levels, resulting in decreased engagement with children and young people.

The visitor experience and programming model used in the past 20 years has delivered many successes, but now feels tired and in need of renewal. The lack of investment has run parallel to rapid change in the leisure and consumer environment. The ageing workforce, the challenging geography and the lack of development in the wider area's tourism product are all limiting factors.

The reality is that these challenging truths need addressed. Doing nothing is not an option.

THE VISION

The vision is for the Ulster American Folk Park to be an international cultural heritage visitor attraction offering the embarkation point for a inspiring, transformative journey, sharing in the remarkable lives of Ulster people who helped to shape a New World:

- To create dramatic and immersive visitor experience spanning two centuries of emigration and settlement;
- To explore the achievements and impacts of Ulster emigrants on people, culture and landscape;
- To honour our ancestors' personal journeys, to better consider and connect with our own.

The New Strategic Vision for Ulster American Folk Park is built around two Core Principles:

- **Deepening stories and deepening engagement**
Exploiting its remarkable heritage and archive assets to revolutionise interpretation, choreographing coherent, immersive, contemporary experiences across the site to bring the open-air site to life all year round.
- **Becoming a cultural heritage enterprise**
Maximising its enterprise focus and commercial opportunities, revitalising its workforce and championing environmental sustainability to achieve a sustainable business model.

WHAT WE ARE GOING TO DO

Museums and heritage attractions are increasingly future proofing their offer by providing compelling visitor experiences. Over the last five years the sector has focused on selling experiences through which the visitor becomes a hands-on participant not a passive observer, informed by the maxim:

A tourism product is what you buy;

a tourism experience is what you remember.

Therefore, a revitalised offer for Ulster American Folk Park will bring history to life through three overarching themes:

1. **Journeys** – creating environments in which visitors can become immersed in the emotion and drama of departure, crossing, arrival and settlement of Ulster people in North America over two centuries; becoming a destination for visitors to reconnect with their roots and honour their own family's journeys;
2. **Stories** – telling the stories of the experiences and achievements of Ulster men and women; confronting the impact they had on the people and communities they encountered; enabling visitors to engage with a fundamental story of Ulster identity – a story of who we are;
3. **Landscapes** – engaging visitors in a celebration of the natural world and what it can teach us about sustainability; engaging with the creativity of traditional skills and crafts; feasting on the sounds, tastes and smells of another world.

These three themes can lay the foundations of a new vision for the Folk Park.

A key enabler to achieve the vision, create unforgettable visitor experience and increase visitor numbers is the ability to refresh, renew and invest in museum facilities. A Strategic Development Framework commissioned by National Museums NI, identified six priority areas for the development of the museum:

1. First Impressions + Lasting Impressions – focusing on the visitor centre and a desire to create: i) a new Introduction Gallery with modern integration narratives in the form of digital and interactive exhibits, and ii) A Lasting Impressions Reflections Gallery.
2. Transition + Voyage – focused on the Ship Gallery and the town areas including refurbishing and remodelling of the ship gallery into America Street.
3. Repurposing existing – enlivening Ulster Street and America Street, introducing new commercial opportunities (shop, café, etc) and new educational space.
4. New Play Park and toilet facilities.
5. Wayfinding and multi-streamed routes – potential for character themed pathways and visitor journeys for short or long stay at the museum.
6. Events Space.

The next steps for the realisation of the vision is for National Museums to continue its engagement with its strategic partners and stakeholders, undertake further market research and consider appropriate phasing of the development based on feasibility studies, costs and special implications. The emerging project/s will be subject to the usual business justification and planning processes.

What do we expect to Achieve?

The potential of this substantial investment in the redevelopment of the Ulster American Folk Park will see a significant increase in visitor numbers, not only to the Park but to the region in general. Improved dedicated Coach Parking provision close to the entrance and improved space in the restaurant will meet and indeed exceed the needs of the coach tourism clientele, allowing the Ulster American Folk Park to

continue to be one of the “must visit” Visitor Attractions on the All-Island Bus Tour circuit.

With increasing numbers of visitors to the Park, it is anticipated that businesses within the local visitor economy will be sustained and even grow with more high quality accommodation establishments that will attract domestic and out of state visitors with disposable income, that will, in turn, improve the performance of the economy within the Sperrins region.

It is anticipated that this development, along with other major inventions such as an improved transport infrastructure along the A5 Dublin – North West corridor, could help realise a year-on-year increase of visitor spend of 5% within the District. As a result of this capital investment at the Ulster American Folk Park, there is potential to grow annual visitor spend from £79m to over £100m over a five-year period, using the baseline from NISRA’s Local Government District figures for 2019.

CONCLUSION

Strategic capital investment will transform the Ulster American Folk Park from a much-loved visitor attraction of the past to a dynamic heritage centre and tourism hub, benefitting both local people and inbound tourism visitors. It will play a relevant and meaningful role at the heart of the community, offering inclusive opportunities for learning, wellbeing and skills development. It will also be a powerhouse of MSW’s economic growth engine, generating tourism from both close-to-home and international tourism markets with a particular focus on the high growth potential in North America.

This investment will complement other proposals including but not limited to the development of the Marble Arch Caves UNESCO Global Geopark, Gortin Glens Forest Park, a long distance walking route around Slieve Gallon and improvements to the A5 Dublin to Derry / Londonderry transport corridor. These developments have the potential to grow the visitor offering and increase the overall GVA to the regional economy.

GORTIN GLEN FOREST PARK & SURROUNDING AREA VISITOR EXPERIENCE DEVELOPMENT

Gortin Glen Forest Park provides an outdoor resource located in the Southern Sperrins that has potential for supporting the delivery of long-term health and wellbeing for residents of the Fermanagh and Omagh District and has the potential to grow economic activity associated with increasing numbers of visitors and tourists from outside the Council area to the wider Sperrins region. Significant investment has been made over the last two years in the Park and its facilities including a destination play area, enhanced walking trails, provision of mountain bike trails, new and improved amenity buildings and outdoor facilities. In the shorter term, Fermanagh and Omagh District Council has committed to invest in the offer through the Sperrins Sculptural Trail which will see the installation of an iconic sculpture on the summit of Mullaghcarn, within the Forest Park. This links to a series of iconic sculptures across the Sperrins with two others located in the neighbouring Mid Ulster District Council area and Derry City and Strabane Council area. This investment has seen visitor numbers already significantly increasing.

This Proposition will be guided by the three key recommendations from The Outdoor Recreation Plan for Northern (2015), namely; Healthy active lifestyles for local people from all communities; Economic growth through encouraging visitors and tourists to come and enjoy the outdoors; and, Protection of landscapes and ecosystems for future generations. It will also demonstrate an active contribution to the sustainable development of the area. The original Masterplan (2015) for Gortin Glen Forest Park aimed to maximise positive impact with respect to the economic benefits to the area through an enhanced offering for the visitor/tourist. It should be noted that the principles of Responsible Tourism and Responsible Development underpin the Development Plan. Sensitivity to and respect for the environment is a central tenet to the Development Plan.

In recent years there has been sustained growth in experiential travel, with people preferring to spend their holidays seeking out more meaningful and personal experiences in beautiful locations that are often perceived as 'off the beaten track', rather than in conventional or popular holiday destinations. The COVID-19 pandemic and the associated significant decline in international travel has brought this trend into greater focus through increasing demand for outdoor countryside access experiences closer to home. This brings a significant opportunity to highlight and market hidden gems such as the Gortin Glens and its wider Sperrins location to domestic and international visitors with the added attributes of local natural and cultural heritage and the outdoor experiences offered, including walking, hiking and mountain biking.

This Proposition reflects the opportunity to contribute to Pillar 4 of the MSW RES *'Building a high-performing visitor/tourist economy to boost existing and new tourism businesses and products'* through the development and creation of a new outdoor visitor experience that will draw on the area's rich natural, built and cultural heritage and, through the Sperrins Partnership Project, market the wider area as a visitor destination.

Future development at this site will address the fact that recent research indicates that, despite its appeal, Tyrone & Sperrins is not recognised nor is it functioning optimally as a tourism destination/area in the eyes of the visitor.

The report arising from the Sperrins Future Search Conference contains five action plans in relation to development of environment and heritage; infrastructure; branding and tourism; community and management, collectively geared to realising a co-ordinated vision for the future of the Sperrins AONB summed up in the report title 'reaching new heights, realising our potential'

BACKGROUND

Fermanagh and Omagh District Council recognises that a partnership approach is required to achieve greater accessibility to the outdoors in a sustainable and responsible manner to realise its full potential as a visitor destination.

Location

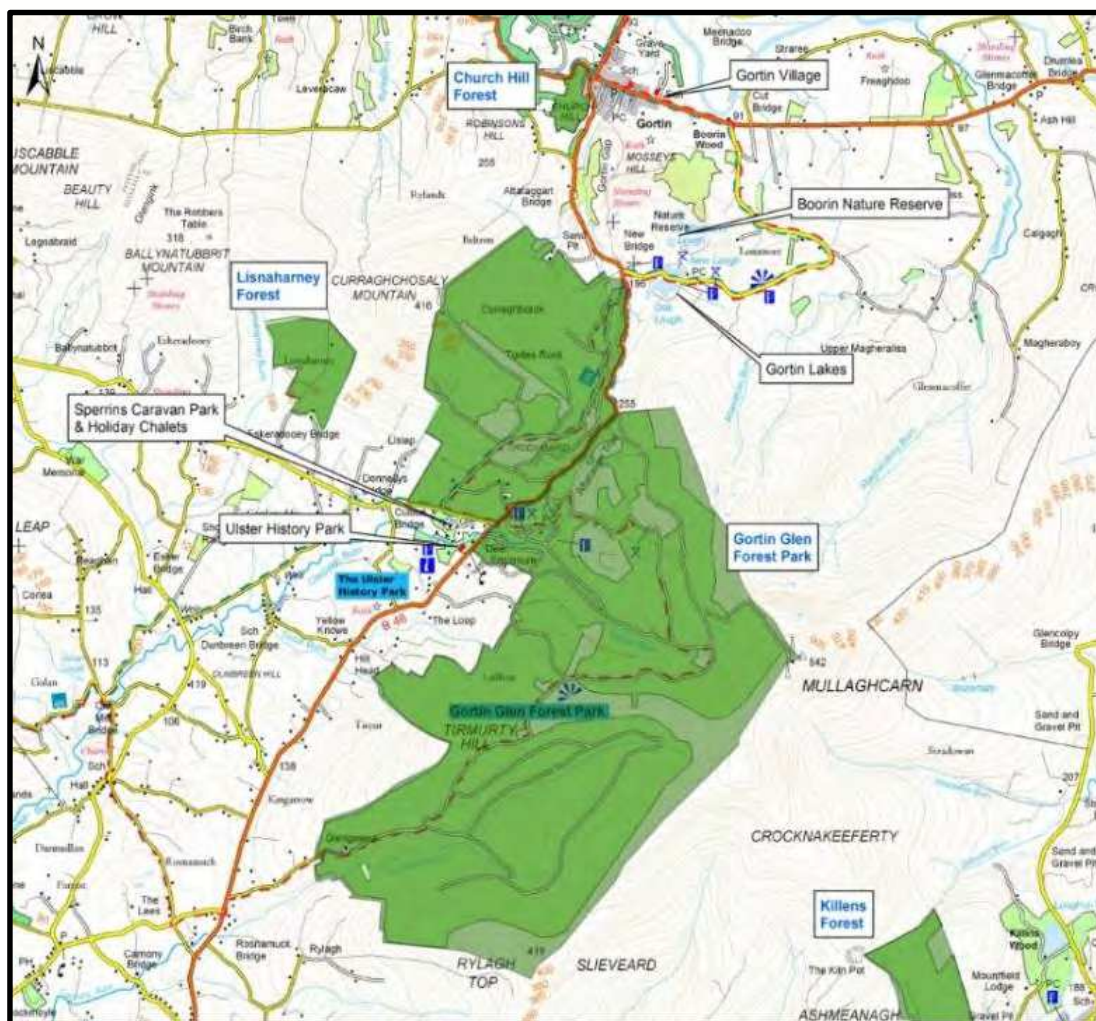
Gortin Glen Forest Park is located six miles north of Omagh off the B48, at the southern gateway to the Sperrin Mountains in the northern part of the District within the Sperrins Area of Outstanding Natural Beauty (ANOB). It is located in close proximity to the Ulster American Folk Park, a key visitor destination within the region.

The challenges and opportunities are those linked to the wider Sperrins region which were extensively considered and reviewed by stakeholders and communities as part of the 2018 Sperrins Future Search exercise, and later documented in the follow up report "The Sperrins, Reaching New Heights and Reaching our Potential". A number of common themes were identified within the report including low infrastructure levels, need for community bottom-up engagement and no overall management structure. Specific issues and challenges associated with tourism sector were also highlighted. These included:

- Physically isolated;
- Demand for building materials and negative impact on landscape;
- Loss of natural and built heritage and possible linked tourism product;
- Area not branded as a tourism destination;
- Appearance of villages need improved;
- No management structures;

- Need to link with Tourism NI plan and develop strong experiential tourism.

[illegible]



THE OPPORTUNITY

There will be a need to take stock and review the Masterplan for Gortin Glen Forest Park with a focus on future developments that will attract increased numbers of visitors and tourists from outside the Council area and encourage them to stay longer, overnight, and spend money in the local economy.

A number of emerging ideas may help augment the attractiveness of the Gortin Glen Forest Park to realise this ambition:

Medium Term (up to 10 years)

- Creation of a board walk experience from the summit southward across the pristine heathland that would open up landscape size vistas and create memorable visitor experiences
- Extend the Mountain Bike Trail network to create over 50km of trails, to become one of the largest trail centres in Northern Ireland. This could include the installation of an iconic over pass through the valley linking both sides of the forest (ORNI Masterplan 2015)

- Creation of unique and iconic forest themed play structures throughout the forest park

Long Term (10 years+)

- Installation of cable car on or near the summit of Mullaghcar that could link with Gortin village (to the north) and the Ulster American Folk Park (to the south)
- Connecting Omagh and Gortin to provide a safe off-road trail using a mixture of; public road, forest land and private property (scoping report by ORNI 2013)

These propositions, and possibly others, will have to undergo a Strategic Outline Business Case Process.

Economic Assessment

Research undertaken by Forest Service NI through its annual visitor survey concludes that every adult visitor to Gortin Glen Forest Park spends in the region of £22.00 per person, equating to an annual spend of just over £900,000. This relates to the survey in 2014. The report from the 2019 study is due to be published in early 2021. In absence of this report and based on visitor figures for the calendar year of 2020, an estimated 60,000 adult visitors has the potential to generate just over £1.3m to the local economy.

In a report commissioned by Sport NI in 2019, it evidenced a considerable increase in the economic impact of outdoor recreation in Northern Ireland with a generated GVA exceeding £131m, representing an increase of 28%. This has been brought about by improvements in the NI economy, greater participation rates, especially in recreational walking, and growth in the outdoor recreation business sector as testified by the increase in the numbers of outdoor recreation operators. (Source: Outdoor Recreation Review 2019 – Commissioned by Sport NI)

Therefore, it is contended that additional developments such as those proposed in this paper, will generate increased GVA in the region and help to sustain and grow employment in the rural areas.

THE VISION

The Vision for this Proposition is:

“A Sustainable Family Orientated Outdoor Experience of International Standout”

WHAT WE ARE GOING TO DO

This vision will be achieved through:

- Improving access and infrastructure for sustained and increased participation for everyone through a range of outdoor recreation activities that enhances the local resident and visitor experience and increase dwell time in the area;
- Linking the health, wellbeing and outdoor recreational outcomes as contained within the Fermanagh and Omagh 2030 Community Plan;
- Responsibly managing the outdoor recreation product at Gortin Glen Forest Park through an agreed process with Forest Service Northern Ireland, the landowner; and
- Create opportunities for outdoor recreation related and hospitality businesses.

CONCLUSION

Any future development of Gortin Glen Forest Park must create the potential to offer a strong fit with the themes reflected in key tourism strategies. These developments will also complement other projects in the regions such as the Long Distance Route in the Slieve Gallon region, the proposed redevelopment of the Ulster American Folk Park and Marble Arch Caves, and the proposed upgrade of the A5 Dublin to Derry / Londonderry transport corridor.

Specifically, the proposed project has the potential to:

- Contribute to long-term economic growth through the development of the tourism economy of the MSW and Fermanagh and Omagh District Council area, offering a distinct and complementary sustainable outdoor recreation product to that offered by the outdoor and water-based activities within the Fermanagh area;
- Encourage visitors and tourists to the area to stay longer and spend more, by creating a cluster of outdoor activities;
- Encourage diversification of the rural economy and improving quality of life in rural areas;
- Build the tourism product by developing quality tourism assets that are aligned to visitor needs;
- Offer a particularly strong fit with TNI's "Embrace a Giant Spirit" themes supporting assets (i.e. adrenaline activity, walking, cycling, etc.) that TNI suggests are of strong appeal to international visitors;
- Improve the health (mental and physical) and wellbeing (including social inclusion) of local people and visitors through the development of sports, leisure and recreation infrastructure within the area in order to provide formal and informal opportunities for people to engage in physical activity and to better access green spaces;
- Protect our natural environment through the development of environmentally sensitive trails and an education facility;
- Contribute to the development of a strong and shared community by unlocking the potential of the leisure sector as an instrument for positive change;
- Encourage active citizenship through volunteering opportunities; and

- Support the new Council's vision to create a district that will be recognised for its unique and beautiful natural environment and for its quality facilities and services through the provision and promotion.

Tourism is a growing industry within NI and has the potential to represent a particularly important sector with the new Fermanagh and Omagh District Council area:

- Within the general tourism industry, outdoor recreation has been identified as having particular potential for growth. Indeed, TNI has identified that a focus on experience-based tourism is increasingly required by the tourism sector, if it is to succeed.

TNI has identified that:

- Many tourists want to get away from the stress of a busy life and retreat to a relaxing rural environment;
- Tourists can be attracted by the establishment of national parks or forests as centres of recreational activity, with trailheads offering amenities for various activities, along with maps, guides, food and drink, and secure parking;
- Tourism sector must emphasise experiences which offer stunning immersive natural phenomena and architecture within a short distance;
- The tourism sector should also consider the geographical hubs that cluster together a range of integrated outdoor activities; and
- The value of short breaks in NI has the potential to increase over the coming five years.

CUILCAGH LAKELANDS GEOPARK

This proposition is targeted at MSW RES Intervention Pillar “Building a High Performing Tourist Economy – Cross-Border Tourism Product Development” and is intended to enhance the visitor experience and the carrying capacity of Geopark sites, building on current rising levels of demand for natural resource tourism and access to outdoor recreation and the opportunities presented through Tourism NI’s (TNI) *Embrace the Giant Spirit* and Failte Ireland’s *Hidden Heartlands*.

Sustainable tourism is at the heart of this proposal; alongside the undoubted potential economic benefits and returns of increasing the number of visitors, their dwell time and their dispersal across the area. All component parts of this intervention have core values of environmental sustainability and adding social value through enhancing quality of life and wellbeing for residents in the Geopark and the wider area.

BACKGROUND

The **Marble Arch Caves UNESCO Global Geopark (MACUGG)**; a cross-border designation that recognises the quality of the geomorphology and landscape around the Cuilcagh Mountain Park and the wider surrounding countryside comprises an area of approximately 18,000 hectares. Initially located exclusively in Fermanagh, it became the first area in the UK to be awarded European Geopark status by UNESCO in 2004. In 2008 and following a formal partnership agreement with Cavan County Council, it became the world’s first cross-border Geopark. In 2020, Fermanagh and Omagh District and Cavan County Councils adopted a ten-year development plan for the Geopark. This integrated and ambitious plan embeds UNESCO’s 17 Sustainable Development Goals and details initiatives and actions intended “to nurture and protect our unique heritage so that our place can restore and revitalise those that live and visit here, and can enable connections between people, heritage and nature.” The current Geopark and its sites is attached as Appendix 1.

Following extensive market research and community consultation in 2020, 2021 will see MACUGG deliver against a new brand. This includes a new boundary (Appendix 2), a new name – ***Cuilcagh Lakelands Geopark*** and a new proposition – ***Experiences, It’s in Our Nature.***

The **Marble Arch Caves** is the gateway to exploring the wider Geopark and is a unique visitor attraction in its own right. It is a key driver and contributor to the long-term growth of tourism for the area and for Northern Ireland. As well as servicing visitors for tours of the show cave, it is the hub from which visitors can explore the immediate

surrounding landscape, including the near-by Cuilcagh Boardwalk - known as “the Stairway to Heaven”. It also acts as a visitor information centre and first port of call for visitors to sites across the Geopark.

Marble Arch Caves is located in **Marlbank** (Appendix 3), an area on the northern, lower slopes of Cuilcagh Mountain offering some of the most picturesque and evocative landscapes in the region and, as well as the Cuilcagh Boardwalk and the show-cave, offering a range of outdoor leisure and recreation opportunities including access to Crossmurrin and Killykeegan National Nature Reserves, Hanging Rock, Gortmaconnell, the stunning Claddagh Glen and “rough caving” opportunities. In recent years, Marble Arch Caves has extended its range of visitor experiences to take full advantage of this unique landscape through expanding its offer to include above ground and seasonal experiences.

In 2019, Fermanagh and Omagh District Council commissioned an Economic Appraisal study on the Marble Arch Caves Visitors Centre. It found a dated facility not fit for the increasing number of visitors and not matching the extraordinary quality of the visitor experiences available and recommended the design and build of a new visitor centre as the most economically advantageous course of action. The below ground experience in the show cave is currently being enhanced through TNI funding of £400k to upgrade elements of the lighting and to create a pilot virtual reality experience. Further investment in the cave and AR/VR can turn this into a world class visitor attraction and international draw.

The **CANN** project is a multi-partner, cross-border environment project involving Cuilcagh Mountain and the Boardwalk which aims to improve the condition of protected habitats and to support priority species, ensuring the future of this internationally important habitat and species and create best-practice in sustainable visitor management. Drawing from the knowledge and experience of international experts in sustainable uplands management, a number of recommendations have been made with respect to Cuilcagh and the boardwalk in order to negate adverse environmental impacts and improve the visitor experience. Key amongst these is the redesign of the final stretches of the Boardwalk and the viewing platform

Amongst the key infrastructural developments across the Geopark in-train that inform but are separate to this proposition are, within the Marlbank area, the further development of the Cavan Burren Park and Shannon Pot, a €6.6 million capital and experience development project. Due for completion in 2024, it is anticipated that this project will double the current 24, 000 plus visitors a year to these sites. Development in the Marlbank area is complemented and enhanced by further developments across the Geopark that will increase and diversify the outdoor recreation offer for both visitors and residents. These include the Scarplands Cycle Trail (Ireland’s longest off-road cycle trail, to be launched April 2021), and heritage driven development at **Tully Castle** (2018 – 2022) and an inter-agency masterplan to develop the untapped potential at **Castle Caldwell** (2022 – 2025). The **Sligo Leitrim Northern Counties Greenway** will pass through the Marlbank area and the key settlements of Belcoo and Blacklion before going on to Enniskillen. This will

provide an added dimension to the **Beara-Breifne Way** - Ireland's longest waymarked trail that ends in Blacklion.

In 2020, the Council took on the lease for Killykeegan Nature Reserve and secured £445,000 to upgrade car parking, toilets, interpretation and the visitor amenity; works will be completed by Spring 2021. Killykeegan will provide facilities for visitors to the Cuilcagh Boardwalk and provides an additional reason to visit Marlbank and the Marble Arch Caves. The next phase of development can link Killykeegan to the MAC visitor's centre by an off-road trail and then on to the Cavan Burren Park (Blacklion) by the Smuggler's Way" trail.

Included in this proposition is the realisation of The **Lough Navar Masterplan 2021 – 2024**. Lough Navar Forest is in the scenic, mountainous uplands of West Fermanagh approximately 4 miles from the village of Derrygonnelly and 14 miles from Enniskillen town. It comprises 2,600 hectares of mature working forest with a mixture of coniferous trees, open habitat areas, rock outcrops, lakes and streams. In 2020 FODC commissioned a development plan for Lough Navar to ensure an integrated approach to further development that would allow this site to fully meet its visitor potential. Proposed within this plan are enhanced car parking, visitor amenities, rough/wild camping, enhanced walking trails, cycling and angling facilities. The Lough Navar Development Plan, whilst commissioned by FODC has been informed by a steering group made up of residents, community groups and businesses and its implementation will be managed in a similar way. This will ensure that benefits to communities and to businesses continue to be central to the thinking for this project.

The **Ballyshannon – Belleek Greenway** is, once again gaining traction; a partnership project between FODC, Donegal County Council and Waterways Ireland, this €4Million project will join to the North West Greenway and provide a sustainable transport and leisure cycling/walking opportunity linking the North of the Geopark and the settlement of Belleek to the Wild Atlantic Way. In 2019, a feasibility study estimated the cost of extending this Greenway to the key Geopark hub of Castle Caldwell at a cost of **£1million**. As well as connecting the Geopark, there is significant potential for this greenway to act as a driver for tourism in its own right; in 2019 Failte Ireland stated "Greenways are one of the biggest success stories of Irish tourism that have brought transformative benefits to local communities" The number of tourists coming to Ireland on walking and cycling holidays has grown exponentially in recent years, from 371,000 in 2012 to 1.8million in 2017. In 2019 46% of all overseas holidaymakers to Ireland engaged in walking and cycling as part of their holiday experience.

THE CHALLENGES

The key challenge facing The Geopark, Marble Arch Caves and the Marlbank area is **growing tourism sustainably to maximise the social and economic benefits** of these key tourism drivers whilst minimising and adverse environmental impacts.

Recent years have seen a high growth in visitor numbers. Between 2015 and 2019, visits to Marble Arch Caves have increased from 57,000 to 72,000 with users of the visitors' centre increasing from 111,000 to 180,000. Use of the Cuilcagh Boardwalk has increased over the same period from 2,500 per annum to 122,000. This growth in numbers has put a strain on the existing infrastructure and has not been without adverse environmental impact and impact on the local community. Cuilcagh and the wider Geopark is a unique landscape. It is vital that visitors are managed to ensure this landscape and its eco-system are not damaged and degraded. In addition to managing the visitor experience at Cuilcagh and Marlbank, expanding and extending the natural resource tourism offer across the Geopark can disperse visitors as well as bring increased visitor numbers and consequent economic benefit to other locales.

THE OPPORTUNITY

To address the challenges, Fermanagh and Omagh District Council is working collaboratively with neighbouring Councils and stakeholders from the private, public and voluntary sectors on three lynchpin solutions/opportunities:

1. The Marlbank Masterplan

Fermanagh and Omagh District Council has a Masterplan for the Marlbank area; a plan that can build on the current growing visitor numbers driven by the Marble Arch Caves and Cuilcagh Boardwalk whilst encouraging "dwell time" in the area bringing associated additional visitor spend and benefit to the villages of Belcoo and Blacklion whilst minimising any adverse environmental impacts. The Masterplan has key infrastructure developments; a new Visitor's Centre for Marble Arch, enhancing the visitor experience in the Show cave; connecting MAC to Killykeegan, Cuilcagh on to the Cavan Burren and enhancing the Boardwalk.

2. Green Connections To The Geopark

Alongside the Marlbank Masterplan, Fermanagh and Omagh District Council and its Geopark partner, Cavan County Council, has an aspiration to raise the connectivity of the Geopark and enhance its "green" connections to neighbouring areas and attractions. In train is the ambitious Sligo – Enniskillen Greenway, passing through the heart of the Geopark and Marlbank. At a more advanced stage of development, The Belleek – Ballyshannon Greenway will connect the north of the Geopark to Donegal and the Wild Atlantic Way. Through this intervention it is proposed to extend this Greenway linking Belleek as a key tourism site to the unique and expansive Geopark site at Castle Caldwell.

3. OPPORTUNITIES ACROSS THE GEOPARK

Essential for the Geopark to reach its full potential as a world class destination for sustainable outdoor recreation tourism is the dispersal of visitors across the area. This can increase dwell time and the length of stay, bring economic and social benefits to settlements and communities across the Geopark and ensure that the risks of over-tourism at honey pot sites are managed and mitigated. Through the realisation of its development plan, Lough Navar has the potential to significantly enhance the Geopark offer and disperse visitors bringing benefits to businesses and communities in the neighbouring villages of Derrygonnelly, Belleek and Garrison. It will complement the well developed Geopark facilities at Castle Archdale and the nascent development plan for Castle Caldwell.

The time is right for the proposed interventions. 2020 saw a growth in the use of the Geoparks outdoor recreation sites. Despite restrictions on international travel and in a challenging trading environment, Marble Arch Caves tours were fully booked between its reopening in July and the mid-September. The appetite for sustainable tourism and outdoor recreation has grown year on year for twenty years and Covid-19 has accelerated this trend.

The significant year on year growth in visitor footfall to the Marbank area has brought many benefits but also highlighted the need for an integrated approach to visitor experience development and management. This proposition can enable Marbank to sustainably manage further growth, ensure that negative environmental impacts are limited and encourage dwell time, bringing benefits to the settlements of Belcoo/Blacklion and wider Fermanagh.

With the current focus on the staycation market and the tourism propositions of TourismNI and Failte Ireland 'Irelands Hidden Heartland' and 'Embrace the Giant Spirit' now is an ideal time to harness opportunities together with partners to connect people with the outdoors, nature and the stories of this stunning landscape. The key to maximising the potential benefits of the growth in Natural Resource Tourism in the Marbank area and the broader Geopark is taking an integrated and planned approach underpinned by the three pillars of sustainability and increasing the "green" connectivity.

THE VISION

The vision for this project is simple and achievable; to create a world class visitor destination that benefits businesses, communities and the environment; bringing economic return to the area. A vision is meaningless without values and the values for this, once again, are simple:

- **Sustainable Development;** Development is underpinned by the three pillars of Sustainable Development and by the 17 UNESCO Sustainable Development Goals
- **Universal Accessibility:** whilst not always possible in natural resource sites, all developments will aspire to the principle of universal accessibility.

- **Carbon Neutral and Climate Change:** all developments must aspire to being carbon neutral; no development can have an adverse impact on the natural environment.

Community Tourism: we want to create an infrastructure with year-round use, servicing both the tourist and the “local” and see the benefits of an expanded visitor economy shared with businesses and residents. To borrow from *Ireland’s Hidden Heartlands* “Our brand is centred around rural communities and their lifestyles, as well as the many spaces for adventure and relaxation”. Key to this is management groups, management agreements and steering groups made up of residents, communities and businesses

WHAT WE ARE GOING TO DO

We are going to....create a world class visitor destination through:

- Building a nearly zero energy visitor centre at Marble Arch Caves as a gateway to the Geopark with a new visitor centre
- Link this visitor centre to the significant developments at Killykeegan Nature Reserve and on to the Cavan Burren and, potentially, the Shannon Pot by the “Smugglers Trail”
- Enhance and extend the Boardwalk Experience
- Create a Greenway linking Castle Caldwell to Belleek; providing green infrastructure between two key tourism assets.
- Create a “national park” experience at Lough Navar
-

Through these interventions we can over 5 years...

- **Create a 5* Tourism NI Visitor Attraction at Marble Arch Caves**
- **Increase Marble Arch Caves tour visitor numbers by 33% to 93k**
- **Sustainably increasing visitors to the Cuilcagh Boardwalk by 60k**
- **Increase visits to the Marble Arch Caves Visitors Centre by 50% to 200k**
- **Increase visitors to Lough Navar by 33% to 75k**
- **Attract 50k visitors a year to the Belleek – Castle Caldwell Greenway**

These are initial SMART targets drawn from the Lough Navar Development Plan and the Economic Appraisal of Marble Arch Caves Visitors’ Centre. The potential for a Greenway to drive growth has not been quantified but with the Waterford Greenway attracting 250,000 users a year, a target of 50,000 is achievable

The goal is an additional 250,000 visitors a year to the Geopark with 10% of these staying overnight. Using £18 Additional Visitor Spend for overnight stays and £18 for day trippers/staycation this gives a potential economic benefit to the area of £5.425million.

This is a multi-faceted, integrated proposal that builds on established success and rising demand. It is a proposition of scale that can change the shape of the area's and the region's tourism offer, driving visits and visitor spend whilst ensuring the three pillars of sustainability are pursued and delivered.

Appendix 1 – MACUGG Map



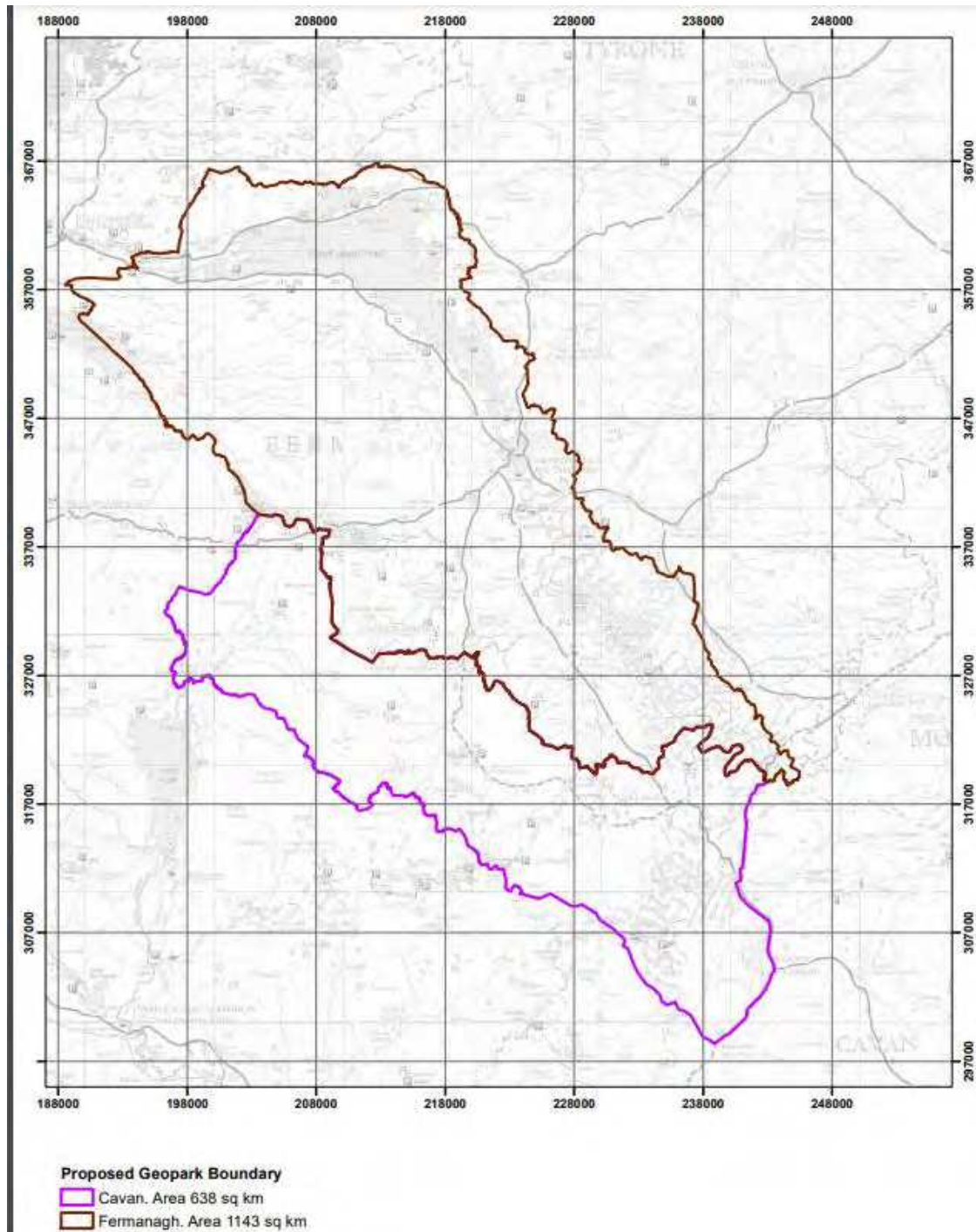
Appendix 2 – Cuilcagh Lakelands Geopark



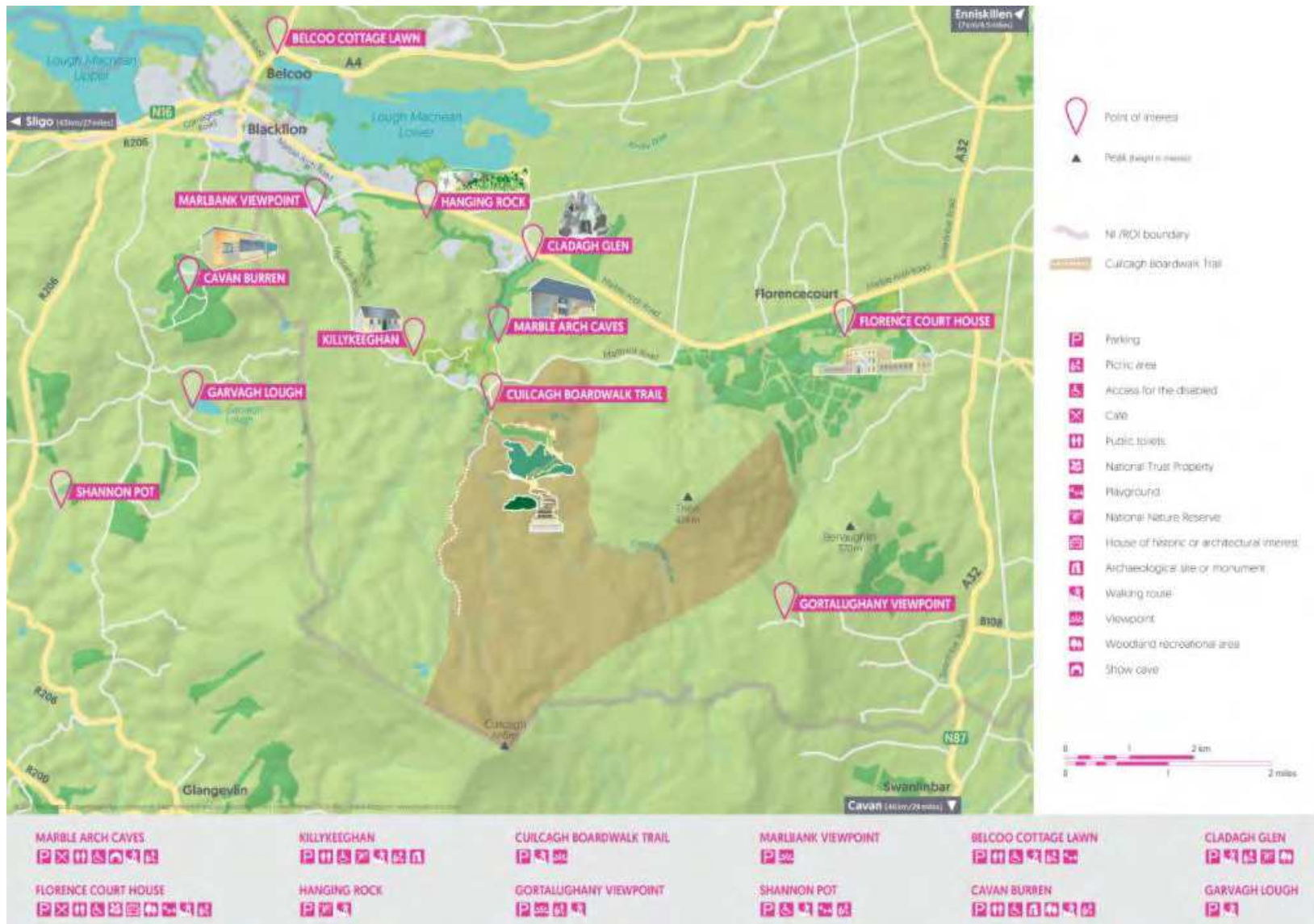
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IT'S IN OUR
NATURE 

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Appendix 3 - Marlbank



Appendix 4 – Belleek – Castle Caldwell Greenway







**THE ENGINEERING SKILLS
AND INNOVATION CENTRE**

ESIC

**DRIVEN BY INDUSTRY
FOR INDUSTRY**

SWC

CONCEPT PAPER

CONTENTS

Introduction	1
The Mid South West Region	4
Need	5
Industry Driven Centre	6
Primary Functions	7
Target Groups	8
Focus Areas	9
Priority Technology Areas	10
Evidence of Impact	11
Sustainability	12
South West College	13

INTRODUCTION

The Engineering Skills and Innovation Centre (ESIC) will deliver a purpose built, state-of-the-art engineering and advanced manufacturing facility, and will focus on the diffusion and adoption of innovation, industrial digitalisation and higher-level technical skills within the Mid-South West (MSW) Region. The facility will connect business, innovation, and education, supporting SMEs and start-ups to overcome both the technological and skills challenges associated with the adoption of industrial digital technologies.

It will serve the world's largest cluster of Advanced Manufacturing businesses in the materials handling sector and a competitive region that represents two-fifths (39%) of NI's manufacturing employment and a quarter (23%) of its manufacturing GVA¹. The MSW manufacturing sector employs some 36,300 individuals and has 70% more employment in Advanced Manufacturing compared to the UK average, however below average levels of productivity, innovation and R&D activity present a challenge for future growth².

The Centre will provide an anchor for collaboration between industry and the skills system, offering the facilities and expertise necessary to provide workforce talent and skills that are aligned with technology and productivity opportunities. The Centre will act as the focal point for the development of both higher level skills and apprenticeship programmes to support the industrial economy of the MSW, in alignment with the Northern Ireland FE Sector hub for Advanced Manufacturing & Engineering. In this context, the Centre will work closely with industry to establish workforce need, co-create curriculum and skills solutions, and deliver direct training to learners at all levels.

The Centre will represent a realistic manufacturing environment for education, training, and applied research purposes, critically linking skills development and innovation, and speeding up the flow of knowledge, ideas and resources between education and industry. Importantly, it will provide a suitable environment for businesses to realise their innovation goals, co-creating and working together to de-risk innovation and create technological opportunities through market-driven research and innovation (R&I) support.

The Engineering Skills and Innovation Centre is outlined in the Mid-South West (MSW) region economic strategy as a signature project under the priority for 'boosting innovation and digital activity' within the region. The realisation of the strategy is underpinned by the announcement of Growth Deal funding from the UK Government in October 2018 which seeks to increase the skills, productivity, and competitiveness of regions across the UK. Ultimately, the facility will enhance economic growth and employment in the MSW Advanced Manufacturing and Engineering Sector, supporting these businesses to prosper in a post-Brexit and technology-driven environment.

¹ Ulster University Economic Policy Centre (2019) 'Future Skills Needs Growth Region'.

² Mid South West Region (2020) 'Regional Economic Strategy'.





A purpose built, state-of-the-art engineering facility, **dedicated to boosting skills and capabilities, digital awareness, and innovation activity** within the Mid-South West (MSW) Region Advanced Manufacturing and Engineering Sector

Objectives

The Engineering Skills & Innovation Centre seeks to deliver four major objectives, namely to:

1. Act as a vehicle for collaboration between industry and education, creating an industry standard training facility that will increase the volume, quality, and level of training for engineering students, apprentices, employees, and educators. Training content will be industry led and the environment and ethos in which its conducted will replicate industry need.
2. Strengthen the productivity and resilience of the MSW region, through the provision of higher-level and flexible training programmes driven by industrial need, in specialist areas that will enable industrial digitalisation and provide a skills base that can deploy and exploit such processes and technologies.
3. Create an enabling environment to support the Manufacturing sector innovate and digitalise, by increasing the availability of industry-led R&D and Innovation support, targeted at SMEs and start-ups, and guided by their customer needs and growth opportunities.
4. Establish a world-leading facility that will form the skills component of Northern Irelands Advanced Manufacturing Ecosystem, and strengthen connectivity with Industry, Schools and University to maximise the development of the sector and opportunities for individuals, industry and society as a whole.

THE MID SOUTH WEST REGION

Profile

The Mid South West region covers the council areas of Armagh City, Banbridge & Craigavon, Fermanagh & Omagh and Mid Ulster. A quarter of Northern Irelands population live in the region and it is home to a third of Northern Ireland businesses. Importantly, the region has very significant levels of Advanced Manufacturing activity, with 70% more employment in high and medium tech manufacturing than the UK average.

The economy of MSW is driven by the private sector and includes many large world-leading companies which are major innovators and global exporters. There is also a very substantial SME base in Engineering and Advanced Manufacturing who export globally and also support the supply chains for these companies. In addition to strengths in pharmaceutical and food manufacturing, the region has acknowledged global excellence in the manufacture of machinery for materials handling for the quarrying and construction sectors.

One of the world's most successful clusters of engineering companies is located in the region with upwards of 200 companies manufacturing 40% of the world market share of materials handling plant. This engineering cluster is skills hungry and has a significant

ongoing demand for higher level skilled employees and apprentices in all disciplines associated with Engineering and Advanced Manufacturing.

The region has a number of well-established industry led collaborative networks including 'MEGA' (Manufacturing & Engineering Growth & Advancement) and 'GET Engineering' formed to address the skills shortage and employability issues within the sector. Supported by government, industry, and education, both networks will have a fundamental role in the development and operation of the Centre.

Consistent with this economic landscape, the MSW region is an important player within the Northern Ireland Manufacturing Innovation Ecosystem. ESIC, physically located in the MSW region, will catalyse further new economic opportunities and ensure future success. The Centre will primarily support companies in the region and help new indigenous and emerging companies, in particular SMEs, to turn commercial ideas into a reality, improve their productivity, develop and keep high value jobs and attract new customers to businesses in the MSW region.

NEED

The MSW region has important industrial strengths in Manufacturing and Engineering. Local companies have a global customer base and a mature local supply chain. A 2019 study by Ulster University Economic Policy Centre highlighted that MSW accounts for two fifths of NI's manufacturing employment and a quarter of manufacturing GVA. However, the productivity level within the MSW region is lower than the rest of NI and this is a key economic challenge. There is a need to close this productivity gap through increased use of technology and automation.

This will require new and higher-level technical and professional skills in Advanced Manufacturing and Engineering, delivered through skills apprenticeships, higher-level apprenticeships and professional training for employees. There is also requirement to 'future-proof' these skills to enable a longer-term perspective on what the 'world of work' will look like in 10 years plus time.

This 'future-proofing' of the skills base has emerged as the top priority from engagement with employers across MSW and is aligned with the findings from the regional socio-economic analysis that skills and access to labour are both a

major current and future constraint to growth and competitiveness.

In tandem with the identified skills need, there is a need to foster higher levels of innovation and R&D in companies in MSW.

Despite the above average concentration of activity and employment in Engineering and Advanced Manufacturing, business expenditure on R&D represents only one fifth of the overall NI business total.

There is a need to facilitate new and a higher level of knowledge sharing with respect to RD&I in the region to support companies with an interest in improving their competitive position through innovation. There is a requirement to provide access and demonstration to new technologies and systems, which are relevant to companies in MSW.

There is also a need to facilitate new networking into the wider NI Manufacturing Innovation Ecosystem, through Universities and City Deal initiatives, and also through investment networks across the UK and Ireland including the relevant Catapult Centres, providing access to revenue streams for MSW via participation in major national innovation programmes and by attracting FDI.

“ The MSW Region is a world leader in Advanced Manufacturing and Engineering with 70% more employment in high and medium tech manufacturing than the UK average ”

INDUSTRY DRIVEN CENTRE

The development of the project proposal and the realisation of the centre will be overseen by three main groups; a Project Board, Project Delivery Team and Stakeholder Advisory Group. To effectively deliver the potential of this Centre, industry in the MSW region will drive conceptualisation, shaping, and governance of the training and services provided in the Centre. They will be integral to the governance and management of the services offered. There will be industry representation both on the Project Board and Stakeholder Advisory Group. This is to ensure that the Centre is responsive to industry needs, while still freeing industry to focus on their core activities of selling and producing; and not on managing a whole innovation/workforce development infrastructure and ecosystem.

As part of this initial scoping phase, SWC have engaged with industry partners from across the MSW Advanced Manufacturing and Engineering sector to seek support and agreement as to the direction of the Centres primary functions, service offering and priority technology areas. Companies and industry stakeholders involved in this initial consultation phases have included.

- Dawson Manufacturing & Engineering Ltd
- Terex
- Sandvik
- CDE Global
- McCloskey's International
- Mannock
- JMG Systems Ltd
- Hyster-Yale Group
- Kingspan Group
- Mallaghan's Engineering Ltd
- Emerson
- Manufacturing Northern Ireland
- Mid Ulster 'MEGA' Manufacturing & Engineering Network

Initial industry consultation has confirmed a strong willingness for instilling an industry-led approach to the conceptualisation and delivery of ESIC. Stakeholders agree there is a real heritage of engineering and manufacturing excellence in the region and this needs to be sustained by bringing through the next generation in engineering excellence and innovation via ESIC. As the proposal advances so will the level of industry and stakeholder consultation.

Additionally, ESIC's design will continue to be informed by the regions existing employer-engagement structures including 'Get Engineering', MEGA, Industrial Advisory Boards and the Engineering Hub network.

PRIMARY FUNCTIONS

ESIC will have four overarching functions that will provide a unique range of services directed to the needs of the manufacturing industry, individual learners, and wider stakeholders. This includes:



Aligning Skills to Industry Demand (Current & Future)

ESIC will position skills, both at a sector and firm level, at the core of improving industrial productivity. Premium will be placed on addressing skill shortages and providing the necessary facilities and expertise for individuals to acquire new or enhanced skills in line with industrial digital technologies and techniques.



Applied Industrial Research & Innovation (R&I) Support

ESIC's model will be focused on industry-driven and market-driven research and innovation support for the SME and start-up Advanced Manufacturing & Engineering sector. It will provide companies across NI with access to the latest manufacturing technologies in areas such as Industry 4.0, Additive Manufacturing & Virtual/Augmented Reality, and provide the knowledge and expertise required to leverage these emerging technologies and de-risk the innovation process for SMEs. Transferring the knowledge of novel technologies and processes through applied R&I models is central to the region grasping the opportunity to improve productivity, open new markets, and deliver a sustainable industrial base.



Network Facilitation for the Region

ESIC will provide a physical structure for enabling network facilitation, better connecting education to the diverse range of stakeholders in the global manufacturing community. To support the increasing pace of technological and business model change, the Centre will build an ecosystem of collaborative partnerships with the private sector, education, government, and complementary manufacturing networks that are necessary to strengthen the position of the region. This will include strong collaboration with the University sector facilitated through the 'AMIC' network, and also wider manufacturing networks including 'MEGA', Manufacturing NI and the UK's High Value Manufacturing Catapult. Additionally, the Centre will work closely with our existing school network to advance practical and effective STEM education, with the aim of raising young people's interest in manufacturing & engineering careers.



Access to Facilities & Technologies

The Centre will provide access to both the intellectual and physical assets that are necessary to raise the quality of training, R&I and knowledge exchange in line with industrial need. It will be aimed at a variety of target groups including; industry, students and employees, schools, educators and other stakeholders (industry bodies, councils), all of whom can directly benefit from access and usage of the facility. The industry-standard facility will comprise of workshop R&D space, engineering laboratories, demonstration & training areas, supported by a community of experts who will facilitate the collaboration and innovation process.

TARGET GROUPS



Industry (Start-Ups and SME's)

The Centre will target the sectors start-up and SME businesses who tend to be disconnected from academic-lead R&D approaches which govern a large part of innovation activity in NI's Advanced Manufacturing & Engineering Sector. These businesses will benefit from the strategic approach that will place skills and innovation support at the foundation of enhancing economic performance, productivity and growth.



College Students & Employees (Apprentices, Trainees, Lifelong Learners)

The industry standard training facility will cater for increased volume, quality, and higher level of training for engineering students and apprentices. It will also directly benefit employees seeking to engage in lifelong learning, opening up greater opportunities for specialist training and employee upskilling. Both categories of learner will benefit from the facilities innovative learning spaces which will provide a realistic manufacturing environment for education, training and research purposes.



Schools (Pupils and Teachers)

The Centre will provide access to the environment, the skills and the technologies required to support schools accelerate technology-enhanced learning experiences outside the traditional classroom environment. It represents a unique space where pupils and teachers will benefit from expert-led outreach initiatives designed to stimulate interest in STEM disciplines through early exposure to advanced manufacturing technology.



Stakeholders (Industry Bodies, Councils and Skills Association)

The flagship facility will strengthen existing and facilitate new collaborations to complement the MSW Advanced Manufacturing Ecosystem. This will include building stronger networks with the University sector facilitated through 'AMIC', and also wider manufacturing networks including 'MEGA', Manufacturing NI and the UK's High Value Manufacturing Catapult.

FOCUS AREAS

The facility will focus on range of activities and development areas which are closely aligned to the core functions we want to deliver to our target groups. A diagram of the core activities the Centre will undertake to effectively deliver on its objectives is outlined below:

ALIGNING SKILLS TO INDUSTRY DEMAND

The Centre will increase capacity for

- Industry Upskilling, Lifelong Learning & Expert Masterclasses
- Higher-Level Training and Apprenticeships in all disciplines that complement Engineering and Advanced Manufacturing (marketing, business, production management).
- Learning Factories
- Train the Trainers
- Leadership & Management Programmes
- Skills Forecasting
- Bespoke Skills Academies

APPLIED RESEARCH INNOVATION SUPPORT

Areas of Applied R&I support will include

- Advanced Manufacturing Technologies
- Advanced Product Control Systems
- Industry 4.0
- Additive Manufacturing
- Visualisation and Immersive Technologies
- Low Carbon Economy

NETWORK FACILITATION FOR THE REGION

The Centre will provide dedicated collaborative space for

- Engineering Curriculum Hub
- Employer-led Industrial Advisory Boards
- Stakeholder groups (MEGA, Manufacturing NI)
- National & International Collaborative Networks
- University Collaboration (AMIC)
- Knowledge Transfer Partnerships
- Applied Industrial Research & Innovation Projects
- FabLab workshops for Schools

ACCESS TO FACILITIES & TECHNOLOGIES

The Centre will be resourced with

- Industry 4.0 infrastructure, training and demonstration
- Immersive Technology Suite
- Additive Manufacturing Centre
- Low Carbon technologies training and demonstration
- R&D Testing & Laboratory facilities
- Dedicated collaborative innovation space

PRIORITY TECHNOLOGY AREAS

ESIC will prioritise the technology areas below, in line with industry demand and the specialisms of the MSW engineering sector. It will align skills development strategies to these areas consistent with industry's current and future needs. This includes:

- **Advanced Manufacturing Technologies;** Synergised advanced automation for welding, joining, fabrication, metal cutting / machining and related design technologies for optimisation of the manufacturing and design process in the Mineral Handling/ Extractives/Recycling Sectors.
- **Advanced Product Control Systems;** including mechatronics, PLCs , hydraulics and pneumatics, Industrial electrical / hybrid systems and related design technologies
- **Industry 4.0;** Robotics and Automation including the utilisation of cyber-physical systems through sensors and connectivity infrastructure, artificial intelligence, machine learning and data analytics.
- **Additive Manufacturing;** including polymer, carbon fibre and metal printing
- **Visualisation and Immersive Technologies;** including the use of virtual and augmented reality to enhance the design process/review, marketing & sales, aftersales.
- **Low Carbon Economy;** including the use of industrial digital technologies to enhance sustainability and the more effective utilisation of renewable energy sources to support the decarbonisation of industrial sectors through electrification and the use of "green" hydrogen.

The operations of ESIC will run in synergy with the proposed Industrial Strategy Challenge Fund (ISCF), both working in tandem to tackle the regions industrial challenges through industry-led and market-driven research and innovation support. ESIC will assist local industry at the early innovation stages, ensuring they have access to the facilities and expertise required to initially road-test the latest industrial digital technologies and techniques in a low-risk environment. This support will be critical for enabling companies to experiment with emerging technologies and processes, ensuring they can identify potential benefits and adoption challenges prior to implementation in their own factories. To ensure this R&D is exploited and sustained, the ISCF will provide financial support to companies to make the necessary investments in manufacturing equipment that will underpin transformations in their productivity.

EVIDENCE OF IMPACT

A study by the High Value Manufacturing (HVM) Catapult³ investigated the role and impact of Centres of Innovation in developing the future workforce that UK manufacturing needs, by seeking examples of international good practice. The headline message of the study, in all 39 locations investigated, was that successful innovation is dependent on the availability of a workforce with the right skills needed for its full exploitation. It concluded a strong link between innovation & skills development, with Centres of Innovation playing an important role in ensuring the correct skills are in place to anchor the benefits of industrial digitalisation. The overarching recommendation for the UK manufacturing is to make improved connections between innovation, education and training initiatives, using the concept of a 'Skills Value Chain' that recognises the necessity to link current and future initiatives and generate a strategic and system-level response to the manufacturing workforce. The study concluded that Centres of Innovation, such as the proposed ESIC are well placed to convene and support workforce development, especially during the innovation process and at early stages of industrial and education adoption.

There is clear evidence to suggest that such 'Centres of Innovation' deliver overwhelming positive impacts for the manufacturing sector. For example, the UK's HVM Catapult has reported significant impact on GVA, attracting high value inward investment and an increase in innovation projects, particularly with SMEs, to harness the power of innovation and strengthen their performance. These impacts are achieved by Innovation Centres providing companies access to world-class facilities and skills, playing a role in demand-led R&D and enabling workforce development in high-level skills⁴.

The growing international trend of 'learning factories' in Centres of Innovation to support the digitalisation of manufacturing also has clear benefit. An example in Europe is the Centre for Industrial Productivity, at Darmstadt Technical University in Germany. Over the past decade it has provided specialised training to 4000 students and 2000 industrial employees. A common theme of many of these Industry 4.0 focused learning factories is the role they play in exposing SMEs to the potential for digital transformation, in conjunction with student education and cooperative research. A recent study has concluded that Centres of Innovation with such facilities, are a fundamental vehicle to raise levels of skills and awareness to enable improvements in manufacturing productivity⁵. In terms of current deployment of learning factories, the UK appears to be behind in comparison to Innovation Centres with similar structures in Germany, Ireland and the USA.

³ HVM Catapult (2020) Manufacturing the Future Workforce

⁴ HVM Catapult (2020) 'High Value Manufacturing Catapult Annual Review 2019/2020'

⁵ Gatsby Foundation (2021) 'The opportunity for learning factories in the UK'

SUSTAINABILITY

The Centre will represent a significant project for the region and sustainability from a financial, environmental, and operational perspective will be at the core of the projects design. SWC are a leader in the field of sustainable design and practices, and have experience constructing large capital projects to the highest international standards in environmental construction. For example, the Colleges new Erne Campus will be the first Passive House Premium project of any kind in the UK, continuing our commitment towards sustainability, previously seen with the awarding winning CREST Innovation Centre, which opened in 2016 as the first Passivhaus Certified Educational building in the UK. Our College-wide sustainability strategy, informed by 'one planet living' principles for land, materials and zero waste & carbon energy, will be incorporated into the design and management of ESIC.

Financially, the Centre will become 'self-sustaining' in the longer-term through delivering centrally funded skills & innovation programmes, generating income in the form of funded and commercial projects and potentially securing corporate partnerships for investment. SWC have a proven track record of generating income to cover the running and operational costs for innovation centres and the operational model proposed for ESIC will be similar to other SWC Innovation Centres such as 'InnoTech'. The InnoTech Centre facilities, carry out 225 R,D&I projects for industry annually and have an income generation target of £1.6m which is annually exceeded. This demonstrates the ability for Innovation Centres to be financially stable and self-sustaining. ESIC will complement and enhance this provision for industry allowing for the delivery of higher level, higher value and more complex Engineering and Manufacturing skills and innovation assistance.



SOUTH WEST COLLEGE



South West College

The proposed development of the Engineering Skills and Innovation Centre (ESIC) will be led by South West College (SWC) and supported by a number of key stakeholders including the three councils that make up the MSW region - Mid-Ulster, Fermanagh and Omagh and Armagh City, Banbridge and Craigavon District Councils.

SWC is rurally located in the western region of Northern Ireland, with five campuses operating across both the Mid Ulster and Fermanagh and Omagh District Council area. It is one of the largest vocational and technical Colleges in the United Kingdom employing over 900 staff, servicing some 22,000 full-time and part-time learners, with an annual turnover of £40million. In April 2014, the Education and Training Inspectorate declared SWC a 'Grade 1 – Outstanding' College, placing it as the only regional College in Northern Ireland to be awarded this accolade, and one of only a few in the UK.

The scope of curriculum at the College ranges from Level 1-7 provision including a portfolio of Further Education (FE), Higher Education (HE), Apprenticeships and bespoke industry courses. This includes a broad range of modern and industry-relevant curriculum primarily delivered across three faculties: (1) Professional and Social Sciences, (2) Built Environment Creative and Life Sciences and (3) Automotive, Computing and Engineering.

Engineering Curriculum

SWC is recognised for its sector-leading, economically focused and industry relevant approach to engineering skills and innovation activity. Consequently, the College are the designated 'Engineering and Advanced Manufacturing Curriculum Hub' for Northern Ireland's FE sector. This copper-fastens the Colleges ability to take a leadership role in driving industry-led engineering curriculum, skills support, and research & innovation services, generating benefit for learners, employers, and stakeholders throughout the entire NI Advanced Manufacturing & Engineering ecosystem.

Engineering at SWC includes a balanced curriculum that facilitates multi-level entry to industry through a range of complementary pathways. Current provision is Grade 1 'outstanding' and covers Mechatronics, Mechanical, Electrical, Electronic, Industrial

Electronics, Advanced Manufacturing, Materials, Wind Turbine Technology and Engineering Management. Curriculum is driven by industry, primarily through the established 'GET Engineering' Cluster which encompasses 102 indigenous and international engineering companies. The embedded college-industry partnership facilitates the future scoping of curriculum, ensuring provision is aligned to both regional employer's needs and global industry trends. The cluster meets monthly and outputs have directly influenced the development of a suite of Apprenticeship, Higher Level Apprenticeship and Degree programmes in the field of Advanced Manufacturing and Engineering.

Innovation Centres

Alongside academic delivery, SWC operates an innovation centre model for industry engagement which is staffed by a team of 30 industrial development associates, research lecturers and PhD students. Under the brand of 'InnoTech', the College operate four specialised innovation centres which directly support the delivery of specialist research, development and innovation services to businesses and entrepreneurs throughout NI. This includes:

- **CREST: Centre for Renewable Energy and Sustainable Technologies**
- **IDEA: Product Design and Development Studies**
- **STEM: Science Technology Engineering Maths**
- **IMAGE: Creative Industries Studio**

InnoTech aims to help businesses grow by providing flexible access to technical support, modern equipment and industrial training in a number of specialist areas including Engineering, Renewable Energy and ICT. InnoTech assists over 250 businesses annually, delivering applied R&D, innovation support and technology mentoring, primarily to micro and SMEs who find more difficult to innovate. SWC has historically been the largest deliverer of SME innovation support with the FE sector and in 2020 delivered 261 projects of which 183 (70%) were in the Advanced Manufacturing, Materials and Engineering sector. This is achieved through the delivery of funded SME innovation support programmes including Innovation Vouchers, Knowledge Transfer Partnerships and the 'InnovateUs' employer support programme.

ESIC would complement SWC's existing innovation centre network and will be focused exclusively on enhancing the competitiveness of Advanced Manufacturing and Engineering companies. This will be achieved by offering new facilitates and expertise necessary to leverage emerging technologies, improve productivity and build a sustainable workforce. In line with the College's existing innovation centres model, ESIC will be openly accessible to companies throughout NI at various stages of development. It will enable new and more intensive forms of industry engagement, to enhance both our business support and curriculum offering in line with the skills and innovation needs of local industry.

Appendix 2



22 December 2020

By email to Sir Peter Hendry CBE ucr@dft.gov.uk

Dear Sir Peter

REF: OPEN CONSULTATION, UNION CONNECTIVITY REVIEW

Mid South West Region (MSW) welcomes government's commitment to levelling up the UK economy by supporting economic growth and addressing regional inequalities and imbalance. Furthermore, the opportunity to comment on the quality, availability and impact of transport infrastructure within Northern Ireland and border connections to the wider UK and Republic of Ireland is also welcomed.

The Mid South West Region comprises Armagh City, Banbridge and Craigavon Borough Council, Fermanagh and Omagh District Council and Mid Ulster District Council and is a unique collaboration formed in 2018 with the sole purpose of driving economic growth and boosting productivity.

The 'Response' section that follows focuses on matters relevant to transport infrastructure, connectivity and growth challenges for the MSW region.

Attached for your information is a copy of the Mid South West Regional Economic Strategy launched in September 2020.

On behalf of the Councils representing the Mid South West Region and as part of our submission to the 'Union Connectivity Review', I invite you to visit the region to ascertain greater understanding of our geography and connectivity challenges, as well as ambitions for inclusive growth and greater prosperity.

Yours Sincerely

A handwritten signature in black ink, appearing to read 'R Wilson', with a stylized flourish underneath.

Roger Wilson, Chief Executive of Armagh City, Banbridge and Craigavon Borough Council on behalf of Mid South West Region, Northern Ireland.

Enc.

OPEN CONSULTATION
‘UNION CONNECTIVITY REVIEW’
CALL FOR EVIDENCE

A Response from Mid South West Region, Northern Ireland

Overview

Mid South West Region (MSW) is the ‘Economic Engine’ of Northern Ireland.

Mid South West Region (a collaboration between Armagh City, Banbridge and Craigavon Borough Council, Fermanagh and Omagh District Council and Mid Ulster District Council) has a global vision to supercharge the economic growth of our region. The economy is driven by a thriving private sector that includes many world-leading companies which are major innovators and global exporters.

With diverse people and economically competitive businesses, our region has grown faster than all others in Northern Ireland (NI). In NI terms, the region accounts for over a quarter of its population, almost half of its land mass, one third of the NI business base, and has the longest proportion of the Ireland/Northern Ireland Border Corridor. Many of NI’s world leading companies were born here and it continues to be home to headquarters of their globalised operations.

MSW has a contrasting urban and predominantly rural landscape which includes Ireland’s oldest city and ecclesiastical capital, Armagh and the towns of Enniskillen, Omagh, Lurgan, Portadown, Banbridge, Dungannon, Cookstown, Magherafelt and the “new town” of Craigavon.

Despite significant historical underinvestment in the region’s basic enabling infrastructure, communication networks including broadband and mobile coverage, and utilities such as wastewater and sewerage systems, our extraordinary people have created a sophisticated and unique ecosystem for businesses to thrive. Entrepreneurial spirit is a distinctive characteristic of the region. Our business mentality, reputation and dynamism has given us a critical edge over other regions demonstrated by the export of more goods and services than all other areas of NI.

The Region specialises in the manufacturing of machinery, equipment, pharmaceuticals and food products. Our specialisms are even more pronounced when compared to the UK average. We are a truly globally connected region that is driving NI’s international dominance across many sectors.

Alongside the economic impact, we have much more to offer – not least our region’s natural and cultural heritage. We are custodians of some of the most unique landscapes and internationally important nature conservation sites. From the Lakes of Fermanagh and the spires of Armagh to the earthy homeland of Heaney, we boast a rich tapestry of assets which can lead to greater economic prosperity.

Mid South West Regional Economic Strategy, launched in September 2020, clearly articulates the vision of our region and focuses on specific and targeted interventions and investment to drive growth in the longer-term. Our ambition is to ‘supercharge’ the growth of the regional economy and ensure inclusive prosperity for the Mid South West Region. In essence, this means boosting productivity; more and better jobs; tackling inequalities; greater investment in the area; supporting our businesses to innovate and grow; improving skills, ensuring future skills to meet the needs of our growing economy; and the resilience of our place.

MSW Regional Economic Strategy is underpinned by the announcement of Growth Deal funding from the UK Government, and is in line with the ‘New Decade, New Approach’ deal to restore devolved government in Northern Ireland. The economic rationale for our Growth Deal centres around a range of interventions across four pillar areas including: ‘Future proofing’ The Skills Base; Enabling Infrastructure; Boosting Innovation and Digital Capacity; and Building a High-Performing Tourism Economy. The validity of each intervention has been shaped by industry in response to prevailing economic challenges.

Key Data and Facts

Below are statistics that must be taken into consideration by the UK government when undertaking the ‘Union Connectivity Review’, as they are significant in terms of articulating existing connectivity and inclusive growth challenges in MSW and the wider Northern Ireland region.

- The MSW region makes up almost **half** of Northern Ireland’s **land mass**;
- MSW’s geographical position is hugely significant as it **spans five of the six** counties in Northern Ireland: Down, Armagh, Tyrone, Fermanagh and Derry/Londonderry, and has the longest proportion of the Ireland/Northern Ireland Border Corridor.
- Geography and proximity to the border means that MSW is contiguous to counties Donegal, Sligo, Leitrim, Cavan and Monaghan in the Republic of Ireland. The region forms a **central part of the North/South border corridor** with much higher levels of cross-border trade, commuting, access to services (including health and education) and recreational use than would be found in other parts of the island of Ireland. In addition, the border region has a co-dependency on tourism, movement of workers, inward investment and funding.

- MSW represents **one quarter of NI population** - combined population of over 470,000 people and a working age population of 300,000 which is forecast to grow;
- MSW created its **own sophisticated and unique ecosystem** for business to thrive, and is home to a third of Northern Ireland businesses and **214,000** workplace-based jobs;
- Generated **£7.7Billion** GVA in 2018 (1/5 of the overall NI Economy). This figure does not consider contribution from **supply chains**;
- MSW is home to many world leading businesses and as such is a globalised, outward and forward looking region which accounts for **27%** of NI **exports**;
- **Leading the Way** in: Manufacturing, Engineering, Agri-Food, Health and Life Sciences, Tourism and Construction. Our regional specialisms are even more pronounced when compared to the UK average;
- MSW is a **significant contributor** to NI Manufacturing Innovation:
 - **39%** of Northern Ireland **manufacturing employment** and **23%** of its manufacturing GVA;
 - **70% more** employment in high and medium tech advanced manufacturing compared to the UK average;
 - **37%** of NI business manufacturing of **machinery and equipment**;
 - **31%** of NI **Agri-food** manufacturing firms;
 - Employment in the manufacture of machinery for **mining, quarrying and construction** sector is almost **four times** the size of the NI average and over **22 times** the UK average;
 - Employment in the manufacturing of basic **pharmaceutical** products is nearly **3 times** larger than the NI average and **15 times** the UK average.

Key Points for Consideration

- In terms of position, NI is the most peripheral of the UK regions and distinct from its neighbouring nations by being connected to them by sea and air only. From a connectivity perspective, MSW's location in NI makes it one of the most peripheral

regions in the UK and indeed Europe. Historically, there has been little or no investment in connectivity (including infrastructure) in the MSW Region and as such regional imbalances and inequalities are profound. However, this landscape is changing as is evident from the key data and facts outlined above.

- The economic geography of the MSW region is shaped by the presence of Northern Ireland strategic corridor routes - the M1, A1 Dublin/Belfast, A4 Ballygawley/Border, A5 (N2) Derry/Dublin, A6 Derry/Belfast and A29 Coleraine/Armagh - all run through the region. MSW's positioning is at the centre of important wider connections and markets, particularly at this critical time when the UK is departing from the EU. Future investment in our north/south and east/west cross border connectivity will significantly influence the functioning of trade, access to labour markets, business productivity and competitiveness. Such investment is essential and will ultimately lead to improvements in NI and UK economic output and the geographical distribution of trade.

To achieve geographical cohesion across the border regions, MSW connectivity must be prioritised. Greater access to regional, national and global linkages (roads, rail, ports and airports) are essential. Strengthening the region's strategic and unique geographic location through enhanced infrastructure and digital connectivity will advance north/south and east/west cross border interactions and global transactions.

- As the 'economic engine' of NI, and with our evidenced strengths in Manufacturing, Engineering, Agri-Food, Health and Life Sciences, Tourism and Construction, MSW is in a prime position to drive wealth creation, exports and innovation. The critical mass of our global economic activity to date has been achieved in spite of underinvestment in basic economic infrastructure and connectivity, demonstrating the resilience and determination of our indigenous businesses in the region to succeed.

MSW Regional Economic Strategy identifies significant challenges to be addressed, amongst them: productivity levels which are almost 10% lower than the rest of NI, and 15% lower than the UK average; providing more and better jobs and the ability to keep our economy open to all levels of international talent in the face of a weaker outlook for population growth, and changing migration policy.

Addressing the productivity shortfall represents a massive opportunity for MSW and NI regions. Doing so would generate substantially more GVA and wealth for our businesses and citizens. For illustrative purposes, if our businesses had closed the 2017 productivity gap (in applicable sectors) with the NI average, productivity would have been approximately 22% higher and thus would have increased MSW's GVA by £1.7bn in that financial year.

- As home to a third of NI businesses and amongst them, many world leading export businesses, MSW industry has been forced to operate with substandard infrastructure networks and connectivity for decades, with consequent constraints on the efficiency of their operations and associated productivity.

Facilitating transport, advanced cross-border connectivity, greater access to road, rail, ports and airports, progressive digital communication capability, access to industrial land, energy and water are considered by MSW as the bedrock to our prosperity and well-being for the regional economy.

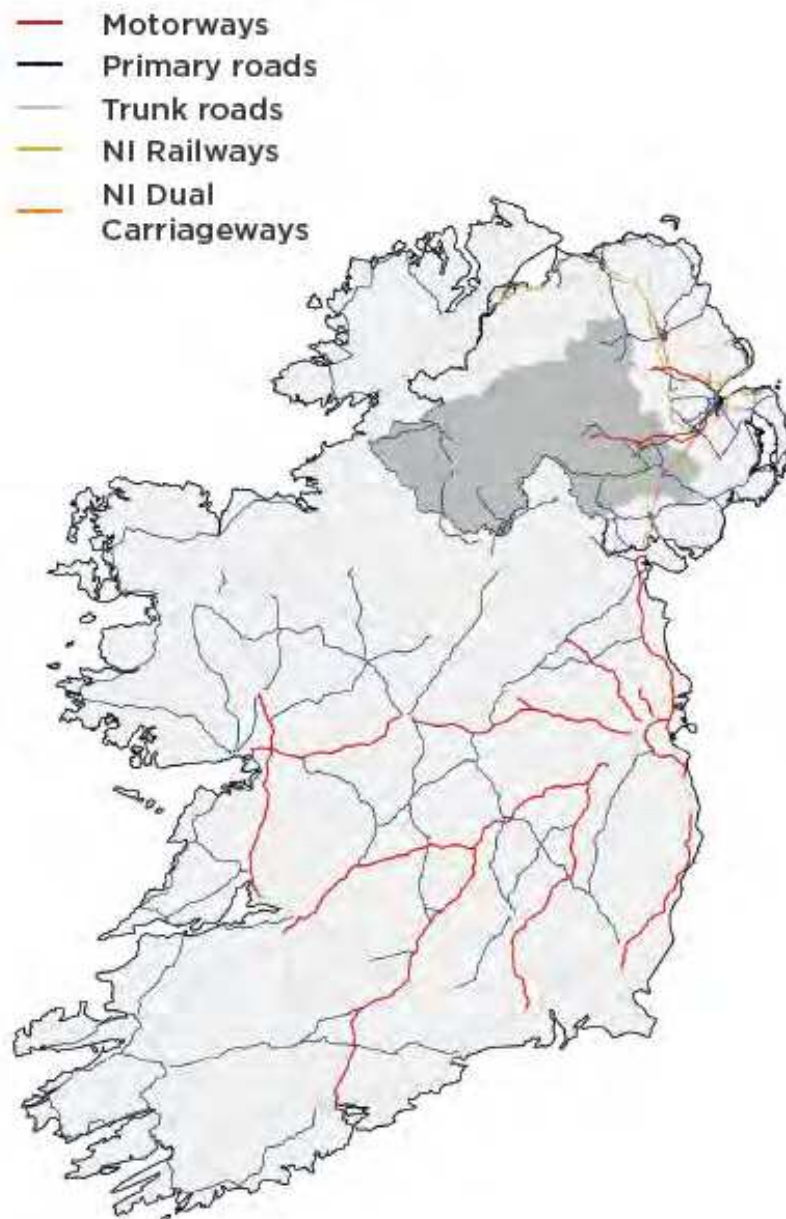
- Future investment by government must be bespoke in nature, and address the actual needs of MSW in order to provide NI regional balance and UK level playing field. Whilst we acknowledge that support for innovation-driven development and the creation of new technologies are vital for future prosperity, it is even more critical that MSW is provided with the opportunity to firstly address the basic economic needs enabling high quality connectivity to facilitate faster movement of products to market, and strengthen our competitive advantage in becoming more progressive in global, complex and strategic supply chain ecosystems.

In order to address regional imbalances and achieve levelling up of NI and UK economies, it is essential in the first instance, to install the basic infrastructure systems that will undergird the structure of our economy and take advantage of our distinctive positioning along the north/south and east/west border corridors. In the absence of redressing the fundamental economic problem (infrastructure gap), increasing productivity and achieving virtuous economic effects will only remain a distant possibility for the MSW region. Based on the financial contribution that the MSW Region makes to the NI and UK Economies, this is an unacceptable position.

- The following basic enabling infrastructure must be prioritised for MSW by NI and UK governments to realise inclusive growth ambitions and achieve a regionally balanced economy (level playing field):
 - Physical Infrastructure – new road networks, rail to the West;
 - Connectivity – improved cross border connections, greater access to rail, sea and air ports, increased digital connectivity, technologies and capability to facilitate 'Freeport' economic zone, broadband and mobile coverage;
 - Access to Industrial Land;
 - Investment in Utilities – electricity, sewerage and wastewater systems;
 - Regeneration and Place Shaping of our Towns and High Streets.
- Whilst MSW accounts for half of the land mass in NI, data shows that motorway and A roads account for only 8% of our network. The map on the next page provides a stark illustration of this. It shows the coverage of motorways, dual carriageways and

primary roads on the island of Ireland, with an evident gap in coverage out to the West:

- There is almost no dual carriageway in Fermanagh and Omagh District Council area (0.6km);
- Dungannon and Cookstown have no bypass networks and as a consequence these major towns in our region, and the roads that surround them are regularly congested;
- Need for bypass networks in Armagh City and Enniskillen, through the East Link in Armagh and the Southern Relief Road in Enniskillen.



- We are told that in order to address economic growth and competitiveness, or to embed new ways of working and technologies, that the infrastructure must be fit for purpose. MSW is significantly disadvantaged and challenged in this way as can be seen above.
- Given that the MSW region is already a hotbed for innovation and hub for global trade, we consider that a central inland 'Freeport' hub site should be located within our region. The 'Freeport' would provide a convenient central management, storage and industrial location for the multiple modes of entry to Northern Ireland and the UK including the airports, rail ports and sea ports and also the multiple points of entry from the Republic of Ireland. The 'Freeport' would greatly assist inward investment across Northern Ireland through developing and enhancing existing competitive clusters and ports, and will maximise the significant regenerative spill-over impacts on adjacent communities within the wider catchment area.

Sophisticated regional, national and international enabling infrastructure and connectivity will be critical to the success of the Freeport in maximising the opportunity and benefits across the unique context of Northern Ireland, addressing our extensive land border and allowing each port to develop its own specialism thereby creating economic regeneration, innovation and job creation benefits across the country.

Conclusion

Mid South West Region is the 'economic engine' of Northern Ireland and is globally connected with driving NIs international dominance across many sectors. The region is in a prime position to build upon the many evident strengths that we have, and further drive wealth creation, innovation, exports and global trade.

Notwithstanding the many successes achieved by our region, we have significant challenges to be addressed including; poor enabling infrastructure; inadequate cross border connections and communications; lower productivity levels than NI and UK averages; providing more and better jobs, ability to keep our economy open to all levels of international talent in the face of a weaker outlook for population growth, changing migration policy, and other key economically challenged areas.

In order to address regional imbalances and achieve levelling up of NI and UK economies, it is essential in the first instance, to install the basic infrastructure systems in MSW that will undergird the structure of the economy and take advantage of our distinctive positioning along the north/south and east/west border corridors. In the absence of redressing the fundamental economic problem (infrastructure deficit), increasing productivity and achieving virtuous economic effects will only remain a distant possibility for the MSW region. Based on

the financial contribution of MSW to the NI, UK, and EU economies, this is a non-acceptable position.

Mid South West Regional Economic Strategy affirms that connectivity drives the economy. The Strategy recognises that the single largest impediment to our Region's economic growth and prosperity is the absence of the basic economic infrastructure that other regions of the UK take for granted. Our Region's ability to move people and goods is vital to the success of our businesses and the growth of our economy.

If the UK Government is serious about its commitment to levelling up and addressing regional imbalances, then it can no longer continue to direct investment in such a way that only serves to exacerbate these imbalances and inequalities. The Mid South West Regional Economic Strategy confirms the need and evidence base for such investment.



31 March 2021

Dear First Minister Arlene Foster MLA and deputy First Minister Michelle O'Neill MLA

Ref: Programme for Government Framework Consultation

Mid South West Region (MSW) welcomes the Northern Ireland Executive's commitment to developing a new strategic, outcomes-based Programme for Government.

The Mid South West Region comprises Armagh City, Banbridge and Craigavon Borough Council, Fermanagh and Omagh District Council and Mid Ulster District Council and is a unique collaboration formed in 2018 with the sole purpose of driving economic growth and boosting productivity.

The 'Response' section that follows focuses on key points relevant to achieving an inclusive society and regionally balanced economy to enable our people to thrive and businesses to grow.

Attached for your information is a copy of the Mid South West Regional Economic Strategy launched in September 2020.

On behalf of the Councils representing the Mid South West Region and as part of our submission to the 'Programme for Government Framework Consultation', I invite you and relevant officials to visit the region to ascertain a greater understanding of our challenges, as well as our ambitions for inclusive growth and greater prosperity for all citizens.

Yours sincerely

A handwritten signature in black ink, appearing to read 'R Wilson', with a stylized flourish at the end.

Mr Roger Wilson
Chief Executive of Armagh City, Banbridge and Craigavon Borough Council on
behalf of Mid South West Region, Northern Ireland

Programme for Government Team

Draft Outcomes Framework

A Response from Mid South West Region

Mid South West (MSW) Region would like to highlight the following summary key points as constituting its 'Response' to the 'Programme for Government Draft Outcomes Framework' and requests these be considered together with the MSW Regional Economic Strategy <https://midsouthwestregion.org/res/> launched on 9 September 2020.

The Mid South West Regional Economic Strategy (RES) clearly articulates an ambition to drive economic growth and boost prosperity, and in doing so creating an inclusive society that will enable our people to live ambitious and fulfilling lives.

Overview

Mid South West Region (MSW) is the 'Economic Engine' of Northern Ireland.

Mid South West Region (a collaboration between Armagh City, Banbridge and Craigavon Borough Council, Fermanagh and Omagh District Council and Mid Ulster District Council) has a vision to supercharge the economic growth of our region and thus creating a better place for citizens and businesses to live and work.

With diverse people and economically competitive businesses, our region has grown faster than all others in Northern Ireland (NI). In NI terms, the region accounts for over a quarter of its population, almost half of its land mass, one third of the NI business base, and has the longest proportion of the Ireland/Northern Ireland Border Corridor. Many of NI's world leading companies were born here and it continues to be home to headquarters of their globalised operations.

MSW has a contrasting urban and predominantly rural landscape which includes Ireland's oldest city and ecclesiastical capital, Armagh and the towns of Enniskillen, Omagh, Lurgan, Portadown, Banbridge, Dungannon, Cookstown, Magherafelt and the "new town" of Craigavon.

Despite significant historical underinvestment in the region's basic enabling infrastructure, communication networks including broadband and mobile coverage,

and utilities such as wastewater, sewerage and electricity systems, our extraordinary people have created a sophisticated and unique ecosystem for businesses to thrive. Entrepreneurial spirit is a distinctive characteristic of the region. Our business mentality, reputation and dynamism has given us a critical edge over other regions demonstrated by the export of more goods and services than all other areas of NI. The Region specialises in the manufacturing of machinery, equipment, pharmaceuticals and food products. Our specialisms are even more pronounced when compared to the UK average. We are a truly globally connected region that is driving NI's international dominance across many sectors.

Alongside the economic impact, we have much more to offer – not least our region's natural and cultural heritage. We are custodians of some of the most unique landscapes and internationally important nature conservation sites. From the Lakes of Fermanagh and the spires of Armagh to the earthy homeland of Heaney, we boast a rich tapestry of assets which can lead to greater economic prosperity.

MSW Regional Economic Strategy clearly articulates the vision of our region and focuses on specific and targeted interventions and investment to drive growth in the longer-term. In essence, this means boosting productivity; more and better jobs; tackling inequalities; greater investment across a broad range of areas; supporting businesses to innovate and grow; ongoing internationalisation of the region; improving skills to ensure our people can reach their potential, ensuring future skills to meet the needs of our growing economy; and the capacity and resilience of our people and place.

The Strategy is underpinned by the announcement of Growth Deal funding from the UK Government, and is in line with the 'New Decade, New Approach' deal to restore devolved government in Northern Ireland. The economic rationale for our Growth Deal centres around an approach to deliver the optimum interventions to further accelerate the growth of the MSW economic engine across four pillar areas including: 'Future proofing' The Skills Base; Enabling Infrastructure; Boosting Innovation and Digital Capacity; and Building a High-Performing Tourism Economy. The validity of each intervention has been shaped by industry in response to prevailing economic challenges.

Key Information and Data for Mid South West Region

MSW requests that the economic contribution of the region (detailed below) be recognised and profiled in future NI government plans.

- Mid South West Region consists of three Council areas – **Armagh City, Banbridge and Craigavon, Fermanagh and Omagh, and Mid Ulster** (see map below). Collectively they make up almost **half** of Northern Ireland's (NI) **land mass** and **all border** the Republic of Ireland. **One quarter** of NI's population live in MSW (478,000 people) with approximately **two thirds** of all residents living within **rural** areas, and in 2018 the **214,000** workplace-based jobs generated an estimated **£7.7bn of GVA** - corresponding to **one fifth of NI's economy**. Significant additional GVA also arises from the supply chain and consumer spending impacts associated with this direct employment. The MSW region is a functional economic geography with **90%** of local jobs taken by residents.



- Our region is a highly entrepreneurial, private sector led economy. Over **one third** of the **75,000 NI firms** are based in MSW, meaning there are 54 businesses in MSW per 1,000 residents— significantly higher than the NI average (40 businesses). The three District Council areas that make up our region rank **1, 2 and 3** amongst the 11 Council areas in NI for **early-stage entrepreneurial activity (TEA)**. This converts into a business birth rate for MSW above the NI average (4 versus 3.6 respectively). Furthermore, business survival rates in MSW also outperform the NI average.
- MSW is home to many **world-leading export businesses** and as such is a globalised, outward and forward-looking region. This is evidenced by the fact that our businesses accounted for **22.6% of turnover** in NI in 2018, **27% of NI exports** and **31.1% of NI external sales**. Further evidence of our outward and forward-looking ethos is the fact that our businesses have historically been very **successful in attracting new labour and skills** to our region. Our success is predominantly based on the vision and determination of indigenous business champions, as Foreign and Direct Investment (FDI) has not played a major role in our region to date. The importance of our indigenous business champions is further underlined by the fact that in large parts of our region there is a **severe lack of public sector jobs**. Previous initiatives aimed at

decentralising public sector employment in NI have failed to have a material impact on our region. However, we welcome the recent announcement of the establishment of new civil service regional hubs and we call on the Finance Minister and the NI Executive to expedite plans to establish Connect2 hubs in Craigavon, Omagh and Enniskillen.

- The positioning of the MSW region along the **Ireland/Northern Ireland Border Corridor** is a key attribute. The Border Corridor is recognised as the sub-regional economic driver within the Regional Development Strategy for NI to 2035. Our region (relative to the other City/Growth Deal regions in NI) has the **longest proportion of the Border Corridor** and as a result, there are significant existing cross-border **co-dependencies** in our region (e.g. in areas such as **trade, movement of people/labour, agri-food, tourism, shared services such as health and education, and inward investment and funding**). Evidence from successive reports and studies all highlight that the impact of Brexit will fall disproportionately on the Border Region and within that on a number of sectors such as indigenous SMEs which are predominant along the Border Corridor. As a region we are now in the very early stages of the **new trading environment** of the post-Brexit era. Access to effective trade pathways in a North/South (island of Ireland) and East-West (GB mainland) context has never been more critical for our region. This however is highly **dependent on effective physical and digital connectivity** with export markets for our products.
- Our region has significant strengths in **manufacturing, engineering, agri-food, health & life sciences, tourism and construction** and mature local **supply chains** in all of these sectors. A 2019 study by Ulster University Economic Policy Centre (UUEPC) highlighted that our region accounts for two fifths (**39%**) of NI's Manufacturing employment and a quarter (**23%**) of its manufacturing GVA. We have **70% more employment** in high and medium tech advanced manufacturing compared to the UK average.
- We have particular **regional specialisms** that are very pronounced at both the NI and UK levels. For example, employment in the manufacturing of basic pharmaceutical products is nearly **three times larger** than the NI average and **15 times** the UK average. A second example is employment in the manufacture of machinery for mining, quarrying and construction sector, which is almost **four times the size of the NI average and over 22 times the UK average**. Allied to this our region is a global leader in the niche market of the manufacture of tracked mobile stone crushing and gravel screening equipment. A final example of a regional specialism is the agri-food sector – our region accounts for **31% of NI's agri-food firms and employs nearly 11,500 people**. We have a strong

presence and capacity for R&D and innovation in the agri- food sector - with the Agri-Food and Biosciences Institute (AFBI) site in Loughgall in Co Armagh and two of the three CAFRE Campuses in NI based in MSW (in Loughry and Enniskillen).

- Finally, our region has particular competitive advantages in terms of the quality of our **tourism product**. The Loughs and Lakes of Lough Erne in Co Fermanagh are a superb recreational and tourism resource and strongly differentiates our region from other destinations in Ireland and Northern Ireland. The Sperrins are a defined Area of Outstanding Natural Beauty (one of only eight in NI) and the cross-border Marble Arch Caves Global Geopark is designated by the Geopark Network and UNESCO. Further east in MSW is the distinctive charm of the majestic city of Armagh, a city that has a unique sense of place with a significance and influence felt across the island of Ireland for 6,500 years and at the heart of celebrating the life of Saint Patrick.

Key Points for Consideration

OUTCOME 2 - WE LIVE AND WORK SUSTAINABLY – PROTECTING THE ENVIRONMENT

MSW Key Priority Areas to be Addressed

- Climate Change
- Water and Wastewater Management
- Housing

Specific MSW Feedback

MSW is of the opinion that sustainable development should be an overarching theme of the PfG, and not a specific outcome.

Whilst the following list of key strategies is not exhaustive, MSW recommends the inclusion of the following strategies in targeting the current climate and nature emergency:

- Local climate change law (Bill) with targets for Northern Ireland to contribute fairly to UK Net Zero by 2050, with the relevant actions put in place and committed to;
- Ammonia Strategy, which would be fundamental to both Climate Action and the delivery of a Clean Air Strategy;

- A new Waste Management Strategy to provide clarity on how the EU Circular Economy Package (CEP) will be implemented in Northern Ireland as previously committed to.

MSW recommends that rurality be specifically addressed as a core issue within this outcome. This is particularly relevant when it comes to issues such as sustainable transport, infrastructure and connectivity, built environment, natural environment etc. MSW requests that the final version of the PFG addresses rurality in this theme, and also in associated themes and key priority areas.

Due to above average population growth and house building not keeping pace with demand, many people in the MSW region are currently facing major housing challenges with exceptionally high levels of housing stress and homelessness.

Notwithstanding these challenges, many new housing and business developments (particularly in MSW urban towns and key settlements) are being constrained by NI Water with restrictions on new connections to the sewerage network.

Underinvestment in MSW region wastewater infrastructure has resulted in lack of capacity in wastewater treatment works and networks, as well as new water mains not being delivered. During 2019/2020 only 92 new social housing units were delivered across the MSW region, and 163 onsite, which is nowhere near the level required to meet housing demand and alleviate housing stress and/or homelessness. Reason for not delivering greater numbers has often been related to inability by social housing providers to connect to the main sewerage network.

The impacts of the sustained underfunding in our water utility demands urgent action and significant capital investment. The supply of social and affordable housing is a key issue in going forward. NIHE estimate that 1,523 new social housing units are required in the Mid South West Region between 2019-2024. Given that housing need is greatest in our urban towns, this is particularly concerning with many of these areas having NI Water restrictions. Failure to find a solution to unlock investment in our water utility will not only have detrimental impacts for our people but also businesses and the natural environment.

OUTCOMES 3 & 4 – WE HAVE AN EQUAL AND INCLUSIVE SOCIETY WHERE EVERYONE IS VALUED AND TREATED WITH RESPECT / WE ALL ENJOY LONG, HEALTH AND ACTIVE LIVES

MSW Key Priority Areas to be Addressed

- Access to Health
- Connectivity
- Deprivation
- Rurality

- Housing

Specific MSW Feedback

40% of MSW's SOAs are ranked amongst the most deprived in NI for access to services. This indicator covers travel time by private and public transport to a range of 16 services and the proportion of properties with slow broadband connections. One of the services considered within this indicator is access to healthcare: Accident and Emergency Services. In many parts of the MSW region deficiencies in the road network and broadband capabilities contribute to some of the lowest performances in relation to ambulance response times in Northern Ireland. Residents are impacted again (and again) because they have the poorest access to acute health care provision as the travel time to a hospital with major injury treatment capabilities is over eight minutes longer than the NI average, and limited availability to public transport infrastructure. It has been acknowledged by the NIAST that the quality of our roads infrastructure (poor terrain and narrow roads), particularly in rurally isolated areas, has an undeniable impact on travel time. This is the 'lived experience' of many in our region to the realities of poor access to critical services and sub-standard infrastructure and connectivity.

The local availability and effectiveness of Health and Social Care services in our region necessitates an urgent review and must be enhanced and future-proofed to meet the needs of our communities. This will require investment in the health estate, infrastructure, reconfiguration of existing services and facilities as well as emergency ambulance services. The importance and role of Primary Care, as provided by our General Practitioners (GPs), as the entry point to the Health and Social Care system for the majority of people, must be central to a future co-designed service.

The access to services deprivation indicator referenced above also reflects the fact that much of MSW has relatively poor access to higher capacity broadband service availability (ultrafast and full fibre). As a result, a high proportion of premises do not have access to higher speed connections, which is particularly evident in Fermanagh and Omagh and Mid Ulster District Council areas. Constraints in our digital connectivity remain a barrier to our people, education, services and businesses. The largely rural nature of MSW requires commitment and positive investment by relevant government departments to ensure no gaps exist beyond the roll out of Project Stratum and other planned interventions.

MSW recognises the issues of poverty and social isolation within the region, and in particular the rural areas. Even though our local economy (pre pandemic) was near or at full employment, with high levels of resident employment and relatively low levels of inactivity and unemployment, there continues to be 'deep pockets' of

deprivation including some which are within the top 10% deprivation levels across NI. As two thirds of the MSW region is located in rural areas, deprivation has higher prevalence among our rural dwellers.

MSW strongly believes that reducing social isolation and loneliness are immediate priorities as is the promotion of good mental health together with other interconnected social determinants of health and well-being including: poor housing, poor jobs, poor mental health, lack of employment and lack of educational attainment on health outcomes.

As MSW is a low wage economy it is imperative that the minimum wage is addressed in order to tackle poverty, disadvantage and inequality. It is recommended that the NI Executive review the use of zero-hours contracts, casual contracts and living wage implementation in order to support the achievement of this outcome.

As previously stated in Outcome 2 the MSW region has above average population growth, however house building has not kept pace with growth in demand. Many people and households are currently facing major housing challenges with exceptionally high levels of housing stress and homelessness. In March 2020, there were 6,803 people in the MSW Region on NIHE waiting lists with 4,272 in housing stress and 2,437 Full Duty homelessness. From March 2019 to March 2020 only 1006 housing allocations were made.

OUTCOME 5 – EVERYONE CAN REACH THEIR POTENTIAL

MSW Key Priority Areas to be Addressed

- Future Proofing the Skills Base
- Reshape our Education Policy
- Address Underachievement
- Education to Jobs

Specific MSW Feedback

Future proofing the skills base is a top priority for the MSW region with skills and labour being both a major current and future constraint to growth and competitiveness in the region. MSW robustly supports the need for reform in the NI Skills Eco-System enabling greater collaboration with and between industry, schools and colleges to ensure students study industry relevant curriculum and subjects reflective of particular local and regional specialisms. Quite simply education policy must be reshaped to provide the skills that our businesses need, and to support the upskilling of many of our residents. At present, the proportion of our labour force that

have no qualifications (16.7% compared to 8% in the UK) is too high while the share that have not progressed to NVQ 4+ or above (31.6% compared to 38.4% in the UK) is too low.

Given that before the Covid-19 pandemic our economy was near or at full employment, there is a need to intervene with actions to ensure that the requisite skills for the future are there in scale and profile to not only fulfil the needs of business but also develop capacity and resilience of our people to achieve high level attainment and access better jobs.

Given that our people are our greatest asset, we now have an increased imperative to focus on these particular areas of need within our overall education and skills development plans. Actions are required to:

- address underachievement
- improve careers education, advice and guidance;
- address under supply of mid-high level tier skills;
- align Further and Higher education to labour market demand;
- promote, inclusive and engaging workplaces;
- develop leadership talent alongside technical and professional skills; and
- increase the uptake of vocational pathways and quality of modern apprenticeships enabling progression to employment or to higher education on a par with general or academic qualifications, particularly to ensure inclusive workplaces.

The above actions will need further development and be ‘future-proofed’ to enable a longer-term perspective on what the world of work will look like for our people in 10 years plus time, with associated skills implications. In addition, there is a need for sustained funding from central government departments to progress the delivery of ‘local’ programmes and initiatives aimed at addressing skills issues in the area.

OUTCOME 6 – OUR ECONOMY IS GLOBALLY COMPETITIVE, REGIONALLY BALANCED AND CARBON NEUTRAL

MSW Key Priority Areas to be Addressed

- NI Regional Balanced Economy
- Physical Infrastructure Deficit
- Connectivity
- Utilities
- Productivity Challenges
- Green Jobs

Specific MSW Feedback

MSW primary objective is to drive economic growth and boost prosperity for all businesses and citizens, and in doing so creating an inclusive society that will enable our people to be ambitious and reach their full potential.

MSW strongly supports 'levelling up' and 'regional balance' within the NI economy. MSW requests that the Executive makes clear what the government policy agenda will be for a regionally balanced economy in NI, and that it applies an evidence based approach consistent with ensuring an equitable allocation of funding and investment in the future. In addition, the use of statistics and index data will be necessary to achieve regional competitiveness development. Such approaches will be critical in order to address the serious infrastructural and connectivity deficits that exist in MSW, and to unlock the productivity gains and economic growth that our region will deliver as a result.

MSW states the need for a separate PfG outcome aligned to the development of high value infrastructure and connectivity in terms of roads, rail, air and sea transport, environmental improvements, urban development, public transport, sustainable travel and availability of high speed telecommunications (broadband and mobile phone networks). MSW requests that the Executive recognise the importance of infrastructure (physical and digital) as an economic driver and contributor to quality of life.

The MSW RES presents an evidence based position on the economic infrastructure challenges that prevail in the region. Facilitating transport, promoting communication, providing access to land, energy and water are the bedrock of prosperity and well-being in any economy. Our RES documents serious gaps in several aspects of this basic economic infrastructure, some of which are named below.

The economic geography of the MSW region is shaped by the presence of Northern Ireland strategic and economic corridor routes - the M1, A1 Dublin/Belfast, A4 Ballygawley/Border, A5 (N2) Derry/Dublin, A6 Derry/Belfast and A29 Coleraine/Armagh - all run through the region. MSW's positioning is at the centre of important wider connections and markets, particularly at this critical time following the UK's departure from the EU. Future investment in our north/south and east/west cross border connectivity will significantly influence the functioning of trade, access to labour markets, business productivity and competitiveness. Such investment is fundamental and will ultimately lead to improvements in NI and UK economic output and the geographical distribution of trade.

To achieve geographical cohesion across the border regions, MSW connectivity must be prioritised. Greater access to regional, national and global linkages is essential. Strengthening the region's strategic and unique geographic location through enhanced infrastructure and digital connectivity will advance north/south and east/west cross border interactions and global transactions.

As home to a third of NI businesses, MSW is in a prime position to drive inclusive growth and wealth creation, exports and innovation. The critical mass of our global economic activity to date has been achieved in spite of decades of underinvestment in the basic economic infrastructure and connectivity, demonstrating the resilience and determination of our indigenous businesses and people in the region to succeed.

Facilitating transport, advanced cross-border connectivity, greater access to road, rail, ports and airports, progressive digital communication capability, access to industrial land, energy and water are considered by MSW as the bedrock to future prosperity and essential for the well-being of our regional economy. Future investment by NI and UK Governments must be bespoke in nature, and address the actual needs of MSW in order to provide NI regional balance and UK level playing field. In order to address these challenges, it is essential in the first instance, to install the basic infrastructure and connectivity systems that will undergird the structure of our economy and take advantage of our distinctive positioning. In the absence of redressing the fundamental economic problem (infrastructure gap), increasing productivity and achieving virtuous economic effects will only remain a distant possibility for the MSW region.

In addition to the physical and digital infrastructure constraints, there are also major deficits in relation to the prevailing wastewater network capacity (refer to Outcome 2) and state electricity supply in MSW. The deficit in wastewater network capacity is most pronounced in Mid Ulster but arguably increasingly more prevalent in other parts of MSW. This is a major constraint on housing development (impacting on the ability to attract people to live and work from elsewhere to MSW) and on the development of serviced land, to enable our businesses to grow and expand. Sufficient access to high quality electricity to meet future supply needs in the region is imperative. As well as security of supply it is essential that the reduction in cost be achieved to support economic growth and facilitate investment.

Key catalyst interventions to achieve this outcome for the MSW region include the completion of a full fibre broadband network across our region, investment in wastewater and sewerage systems as well as the delivery of strategic road network improvements including the A3 North and West Link, A4 Enniskillen Southern

Bypass, A5 Derry to Aughnacloy, A28 Armagh East Link, A29 Cookstown and Dungannon bypasses, and A32 Cortnamuck & Kilgortnaleague.

The acute need for development land has been identified as a key development constraint for medium/large sized companies in MSW. This issue continues to stifle economic growth, indeed it threatens the region's economic recovery from the Covid-19 pandemic and yet there is industrial land available in MSW that could be made available to our indigenous businesses to support their immediate growth plans. There is also a lack of high-quality innovation space to enable our people to test new ideas, work with emerging sectors and collaborate in research and development. Yet collaboration and the sharing of ideas, is a key ingredient for a successful knowledge economy.

MSW RES identifies significant challenges to be addressed, amongst them: productivity levels which are almost 10% lower than the rest of NI, and 15% lower than the UK average; providing more and better jobs and the ability to keep our economy open to all levels of international talent in the face of a weaker outlook for population growth, and changing migration policy. Addressing the productivity shortfall represents a massive opportunity for MSW and NI. Doing so would generate substantially more GVA and wealth for our businesses and citizens.

Despite the MSW region being recognised as the 'economic engine' of NI, and a highly entrepreneurial economy with favourable survival rates, there is evidence that too many of our indigenous businesses fail to grow. Over 86% of local businesses have less than 10 employees compared to 83.9% in NI. In addition, over a third of MSW businesses have a turnover of less than £50,000 compared to a quarter across NI. The need for increased support for SMEs is evident.

In relation to the 'Green Economy' it is essential that government policy champions an increase in the number of 'green jobs' and the provision of support for existing and start-up circular economy businesses. Incentivising industry to innovate should also be a focus of this priority.

OUTCOME 9 – PEOPLE WANT TO LIVE, WORK AND VISIT HERE

MSW Key Priority Areas to be Addressed

- Visitor and tourism economy/Tourism Sector
- Accessibility/Physical Infrastructure Deficits
- High Streets and Town Centres
- Housing

Specific MSW Feedback

As noted previously our region has particular competitive advantages in terms of the quality of our tourism product and our ambition for the tourism sector is to build a high-performing visitor and tourism economy. The opportunity to further grow tourism in MSW, sits in the context of the strong growth in overall tourism activity in NI in the five years, pre the pandemic, and the potential to route 'out-of-state' visitor traffic on from the tourism 'hotspots' of Titanic Belfast and the Causeway Coast. This in turn will help create greater regional balance in the tourism economy of NI. However, the performance and impact of investment in MSW tourism products is intrinsically linked to overcoming the infrastructure and connectivity barriers to the growth of out-of-state tourism in our region. Indeed, Tourism NI research confirms that the main barriers to out-of-state tourism growth in MSW include the physical accessibility of the region, information and signposting and digital connectivity. Out-of-state visitors to NI, visiting for a short period/ weekend break, often rely on public transport, rather than car hire. Therefore, the absence of rail links to existing 'tourism hotspots' and gateways into NI, is a material accessibility barrier to readily accessing the world class tourism product in our region. For those visitors who do hire a car, the experience of driving also poses accessibility barriers, given the deficiencies in our road network.

Locally, within the MSW region, Tourism is important to the local economy and has enormous potential. Further investment interventions are required to support the tourism sector to recover from the pandemic could include: improving the attractiveness of towns and villages, investing in new visitor experiences, increased marketing of 'staycations', amongst others.

MSW region high streets and town centres are facing significant challenges as a consequence of a lack of competitiveness due to higher operating costs than online competitors (eg property costs), underperformance, evolving economies, developing capability and changing technologies, advancements in artificial intelligence and automation, and the impact of coronavirus. These challenges have been further amplified with the implementation of mitigation measures to ensure customer safety, more precautionary consumer actions and subdued confidence levels leading to further decline in footfall and customer spending. Notwithstanding the coronavirus crisis, now is the time to reimagine, regenerate and transform our high streets and town centres for the future, and indeed shape the 'new normal'. Future investment must ultimately create the conditions that will attract greater numbers of people to live, visit, shop, work, walk and play, which collectively will increase spending in the region.

Affordability for rental properties is a major issue in many parts of the MSW region with extortionate rental prices and exponential increases being imposed on tenants renting within the sector. Such impositions are resulting in immense suffering by many residents who are already enduring rises on restricted or decreasing income levels. In some areas rents are in excess of £650 per month for five person three bedroom houses. Many tenants are faced with significant shortfalls per week between rental charge and housing benefit payable. Consequently, to the affordability issues many tenants are experiencing recurring homelessness and increased poverty. A possible way to tackle this issue would be to review the potential for rental cap or rent pressure zones, where tenants are experiencing homeless due to affordability.

Conclusion

Mid South West Region is the 'economic engine' of Northern Ireland.

Notwithstanding the many successes achieved by our region, we have significant challenges that must be addressed including but not limited to poor infrastructure and connectivity (roads, rail, utilities, digital communication capability, industrial land, housing, town centres); lower productivity levels than NI and UK averages; providing more and better jobs; ability to keep our economy open to all levels of international talent in the face of a weaker outlook for population growth; rural isolation and deprivation, greater access to services including health, education and transport; and changing migration policy.

If the UK and NI Governments are serious about their commitments to levelling up and addressing regional imbalances, then they can no longer direct service provision and investment in such a way that only serves to exacerbate imbalances and inequalities.



First Minister Arlene Foster MLA, and deputy First Minister Michelle O'Neill MLA (front row) launching the Regional Economic Strategy for the Mid South West Region. Back row: Councillor Robert Irvine, Vice Chair of the Mid South West Steering Group; Roger Wilson, Chief Executive of Armagh City, Banbridge and Craigavon Borough Council; Alison McCullagh, Chief Executive of Fermanagh and Omagh District Council; Anthony Tohill, Chief Executive of Mid Ulster District Council and Councillor Cathal Mallaghan, Chair of the Mid South West Steering Group.

Supercharging the Mid South West Economy

As the Mid South West launches its Regional Economic Strategy, the Mid South West Region Governance Steering Group write for *Ambition*, outlining how an area already considered the economic engine of Northern Ireland has plans to boost productivity and prosperity.

The commitment of three Councils to work collaboratively to drive economic growth across their areas makes sense. By pooling resources, ideas and status the collective can benefit from economies of scale and the region is much better placed to pursue investment.

The Mid South West is a collaboration between Armagh City, Banbridge and Craigavon Borough Council, Fermanagh and Omagh District Council and Mid Ulster District Council.

In the pages that follow you will read more of the detail of our collective ambition for the Mid South West Region and that ambition is firmly grounded in a place which has been the economic engine of Northern Ireland for quite some time. We're proud of where we've come from, however we know that as a region we are capable of much, much more if we can address the deficits that exist – infrastructure,

skills, innovation and tourism – and by doing so, provide the right conditions for those sectors where we are already leading the way – advanced manufacturing, engineering, agri-food, health and life sciences, tourism, construction and others – to excel.

In essence our Regional Economic Strategy is focused on helping companies across the Mid South West supercharge the growth of their businesses which will in turn turbocharge the growth of the Mid South West economy and the Northern Ireland economy.

We will strive to tackle the barriers to growth while also helping companies to become exemplars in their field, capable of competing with the best in the world.

Collaboration is central to achieving this aim, not just across the three councils in the Mid South West but also with the business

community which is at the heart of the region's economic future.

We have already benefitted from the insight and expertise of our Business Reference Group, made up of some 18 companies who represent the region's sectoral strengths and who were central to shaping the strategy.

Moving forward, the commitment from all businesses in the Mid South West – startups, SMEs, large companies and every inward investor – will be critical to ensuring that the strategy can be successfully delivered.

We are breaking new ground with our Regional Economic Strategy and together we will be able to boost productivity and prosperity across the Mid South West Region and create an even better place for everyone to live, work and play.



The Mid South West Regional Economic Strategy – What is it?

The Regional Economic Strategy outlines an ambitious and confident way forward for the Mid South West Region and, indeed, the whole of Northern Ireland. It was an important initiative when work first began on it in 2018 and it's even more important now as the region deals with the economic effects of and recovery from the Coronavirus pandemic.

The strategy has been developed in close consultation with government departments and agencies, Invest Northern Ireland, Tourism Northern Ireland, skills bodies, business representative groups, educational institutions, universities and, crucially, businesses from a wide range of sectors – these contributions have been vital.

The key to its success is putting businesses and our economy at the heart of our plans to ensure that funding support – whether public

or private – is invested in the most responsible and effective manner.

Significant investment will be required to deliver the strategy with a total commitment to date of £252 million towards a Growth Deal from the UK Government and the Northern Ireland Executive. In addition, we intend to pursue other opportunities, such as investment through PEACE PLUS and the Shared Prosperity Fund to name a few.

The Regional Economic Strategy

The strategy is structured around four intervention pillars:

1. 'Future Proofing' the Skills Base
2. Enabling Infrastructure
3. Boosting Innovation and Digital Capacity
4. Building a High-Performing Tourism Economy

Our interventions will be geared towards delivering exponential and long term benefits including:

- Increasing productivity levels and closing the productivity gap
- Driving business growth
- Protecting our unique sectoral advantages and realising sectoral opportunities
- Creating more, better paid jobs
- Rebalancing the regional economy
- Increasing our global impact and underlining the benefits to the Northern Ireland economy.

THE 'ECONOMIC ENGINE' OF THE NI ECONOMY

Contributes
£7.7bn
of GVA

1/4
of NI population

Home to
1/3
of NI firms

90%
of local jobs taken
by residents

Accounts for
1/5
of NI economy

70%
more employment in
advanced manufacturing
compared to the UK
average

Accounts for
27%
of NI's exports

214,000
workplace-based jobs

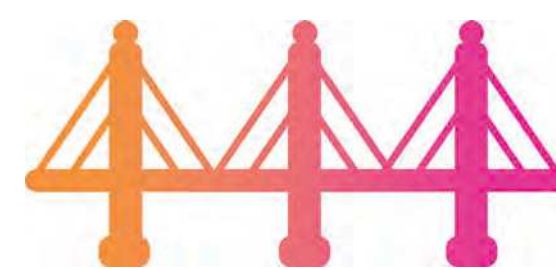


1. 'Future Proofing' the Skills Base

Future proofing the skills base is becoming ever more important. It's a top priority emerging from our engagements with business. We want to ensure that the requisite skills are available in scale and profile to underpin our region's ambitions and those of our already very successful businesses.

As well as requiring significant financial investment, we are seeking to drive change in four policy areas:

- access to labour/lobbying for a differentiated migration policy
- policy changes to 'Off-the-Shelf' Apprenticeships
- extending the range of Higher-Level Apprenticeships and Degree Apprenticeships available in our region and
- a greater focus on Shared Apprenticeship schemes.



2. Enabling Infrastructure

Investment in infrastructure is critical. If we're going to get anywhere we need to have the strategic road infrastructure that enables our businesses to access all areas including ports and distribution points.

We've pinpointed where improvements are needed – the Armagh East Link; the A29 Cookstown bypass, the A4 Enniskillen Southern bypass, as well as the development of the A3 Armagh North & West Link, the A29 Dungannon bypass and the A32 Omagh to Enniskillen.

It's not just roads. Investment must also be targeted at:

- addressing broadband, mobile coverage and reliability
- transforming our high streets to be places of choice for our local communities
- enabling access to available industrial land
- driving investment in electricity supply, and
- supporting opportunities for regeneration and site development.



4. Building a High-Performing Tourism Economy

Finally, we want to focus on building a high performing tourism economy. Our region has so much to offer – the Fermanagh Lakes, the Sperrins, our literary heritage, the cultural significance of Ireland's oldest city, Armagh, where Patrick established his first church, the Ulster American Folk Park – and more besides. The recent announcement of the commitment to the Game of Thrones Legacy Project from the private sector is a welcome investment.

We want to invest in the development of our tourism product – including cross-border – in actions that stimulate/de-risk and expedite quality hotel investment as well as improving infrastructure for routing/ signposting and visitor engagement.

However, we know from Tourism NI research that the main barriers to growing our visitor economy are accessibility and connectivity.

3. Boosting Innovation and Digital Capacity

Advanced manufacturing is one of our big success stories and it has enormous potential. We're placing our ambitions in this area into the NI-wide 'eco-system' and at the centre of what is being discussed within the City/Growth Deals (i.e. the Advanced Manufacturing Innovation Centre in the Belfast Region City Deal and the Centre for Industrial Digitalisation, Robotics and Automation in Derry/Londonderry City Region). Our ambition is to create an innovation and skills academy delivered by the South West College in Dungannon.

In relation to Agri-food our impact is global. We'll support our colleagues in CAFRE in the development of a Northern Ireland Agri-food Robotics Centre at the Loughry Campus and we'll work in collaboration with AFBI to develop a centre for Agri-Tech Innovation. We will develop Agri-food incubation space to support food development for smaller SMEs, an area that's currently being explored by the Southern Region College.

Then there's the digital tech sector. We need to develop a network of Digi-Hubs to support this sector's growth. In addition to exploring a number of potential health innovation proposals with the Region's two leading and acute teaching hospitals, we're also exploring a new-build Health and Care Centre in Cookstown.

NEXT STEPS

We've already engaged extensively with our businesses and key sectors, with politicians locally, regionally and nationally, with central government, with education and the wider stakeholder community, and that will continue.

We will also continue to work closely with the other City/Growth Deals to ensure that we complement each other and provide maximum benefit for NI PLC.

We've outlined the scale of our ambition and

the need to support investment to demonstrate significant GVA output.

We will continue to welcome the input and guidance of our industry/business base. We need their continued engagement with this initiative as we move through the next stages in development.

The collaboration of our three councils to develop the Mid South West Regional Economic Strategy is a model of what can be achieved by people working together for the common good. But we don't want it to stop there.

We are living in truly life-changing times. In years to come, people will look back on 2020 and the Coronavirus pandemic and see it as a challenging experience for us all. We want to make it a positive moment in our history – the beginning of something transformative which builds on the Region's creativity and innovation.

This is truly a once-in-a-lifetime opportunity to supercharge the Mid South West economy, to boost prosperity for everyone in Northern Ireland and create the right environment for our powerhouse businesses to thrive.

For more information contact info@midsouthwestregion.org or midsouthwestregion.org and on Twitter @MSW_Region

Collaborating for a strong economic future for the Mid South West Region

How co-operation between the three councils which make up the Mid South West Region led to the development of a Regional Economic Strategy to supercharge the growth of the region's economy.



Pictured at the launch of the Mid South West Regional Economic Strategy are, from left: Nigel Manley, Balcas; Cormac Diamond, Bloc Blinds; Damian Heron, Heron Bros; Darragh Cullen, Edge Innovate; Roger Wilson, Chief Executive of Armagh City, Banbridge and Craigavon Borough Council; Diane Dodds MLA, Minister for the Economy; Alison McCullagh, Chief Executive of Fermanagh and Omagh District Council; Anthony Tohill, Chief Executive of Mid Ulster District Council; Adrian McCoy, Severfield; Brian Irwin, Irwin's Bakery; Cathal Mallaghan, Chair of the Mid South West Region Governance Steering Group; Liam McCaffrey, Mannok; Kevin Holland, Chief Executive of Invest NI; Ethna McNamee, Regional Manager Invest NI; Councillor Robert Irvine, Vice Chair of the Mid South West Region Governance Steering Group.

A new strategy designed to supercharge the growth of the economy of the Mid South West (MSW) will create the right conditions for companies located in the region to flourish in the coming years.

The Regional Economic Strategy is focused on boosting productivity across the three council areas of Armagh City, Banbridge and Craigavon Borough Council, Fermanagh and Omagh District Council and Mid Ulster District Council - which make up the Mid South West Region and will require businesses to play their part in helping to realise its ambitious goals.

The strategy, which was developed following extensive research and analysis of the region's economy and was informed by engagement with the region's major employers, identifies challenges and opportunities and sets out four pillars to guide investment and growth the collective economy.

The pillars are: future proofing the skills base, enabling infrastructure, boosting innovation and digital capacity and building a high performing tourism economy.

By focusing on those areas, the overriding goals of increasing productivity, driving business growth, fully realising sectoral strengths and opportunities, creating more and better-paid jobs and ensuring the ongoing internationalisation of MSW

can be achieved, Councillor Robert Irvine, Chair of the Mid South West Region Governance Steering Group, said.

"Our ambitions for the Mid South West economy are far reaching, but we are confident that with the support of all stakeholders in the region they are wholly achievable. The analysis of the region's economy was honest both in terms of identifying its strengths but also the areas where support and investment in a range of strategic interventions can have the most impact.

"Through the Regional Economic Strategy, we will strive to create the conditions that the private sector needs to grow their businesses, employ more skilled staff and become internationally competitive. We are unashamedly ambitious as are our businesses and so by working together we can raise productivity and create a better future for everyone."

The strategy will enable the Mid South West Region to leverage financial investment from a range of sources - such as the Growth Deal funding announced by the UK Government and Northern Ireland Executive, the PEACE PLUS Programme, the UK Government's Shared Prosperity Fund, Innovate UK and other central government funding.

Following the recent launch of the strategy by First Minister Arlene Foster MLA and deputy First Minister Michelle O'Neill MLA at a socially-distanced event held at EDGE Innovate near Dungannon, Minister Dodds MLA, who also attended the launch said its overriding aims are more relevant than ever as the region recovers and rebuilds, adding that the support of the business community has been and will continue to be crucial. "This strategy provides an excellent framework to support the identification of Growth Deal projects and the councils are to be congratulated for coming together and working constructively" for the betterment of the region.

She said sustained industry engagement will be key to its successful delivery.

The strategy sets out several areas where growth is being impeded and how those impediments can be removed.

Boosting productivity, connectivity and infrastructure, skills and making more of the region's tourism offering are the focus of the strategy, which is structured around four intervention pillars.

1
'Future Proofing' the Skills Base

Future proofing the skills base is becoming ever more important. It's a top priority emerging from MSW's engagements with business and the strategy aims to ensure that the requisite skills are available in scale and profile to underpin the region's ambitions and those of its businesses.

2
Enabling Infrastructure

Investment in infrastructure is critical. To boost productivity MSW needs to have the strategic road infrastructure that enables businesses to access all areas including ports and distribution points, as well as better broadband and mobile coverage, access to industrial land for development and improved investment in electricity supply.

3
Boosting Innovation and Digital Capacity

We aim to support businesses to be more productive by helping enhance their capabilities in crucial enabling technologies such as data analytics, robotics, automation, Industry 4.0, machine learning, artificial intelligence, augmented reality, advanced materials and production techniques, and to exploit the growth opportunities these technologies hold for our region.

4
Building a High-Performing Tourism Economy

Finally, the strategy is focused on building a high performing tourism economy which capitalises on the region's tourism assets including the Fermanagh Lakes, the Sperrins, Marble Arch Caves UNESCO Global Geopark, MSW's literary heritage as well as the cultural significance of Ireland's oldest city Armagh to name a few.

The future

MSW has engaged extensively with businesses and key sectors, with politicians locally, regionally and nationally, with central government, with education and the wider stakeholder community, and this engagement, particularly with businesses will continue.

"We will continue to welcome the input and guidance of our industry/business base," Councillor Irvine said. "Their ongoing engagement with this initiative is critical as we move to the next stage of development."

"This is a once-in-a-lifetime opportunity to supercharge the Mid South West economy

and cement the Region's position as Northern Ireland's engine room."

Eye

For further information visit www.midsouthwestregion.org or email info@midsouthwestregion.org

Mid South West collaboration lays down plans for a prosperous future

How the input of local and central government can help to deliver on the ambitions of the Mid South West Regional Economic Strategy



Pictured, from left, are: Councillor Robert Irvine, Chair of the Mid South West Region Governance Steering Group, Roger Wilson, Chief Executive of Armagh City, Banbridge and Craigavon Borough Council, First Minister Arlene Foster MLA, Minister of State for Northern Ireland, Robin Walker MP, Minister for the Economy Diane Dodds MLA, Alison McCullagh, Chief Executive of Fermanagh and Omagh District Council, deputy First Minister Michelle O'Neill MLA, Anthony Tohill, former Chief Executive of Mid Ulster District Council and Councillor Cathal Mallaghan, former Chair of the Mid South West Region Governance Steering Group.

A unique collaboration bringing together three Northern Ireland councils and the private, third level and education sectors has produced a strategy aimed at supercharging economic growth across the region in the coming years.

Armagh City, Banbridge and Craigavon Borough Council, Fermanagh and Omagh District Council and Mid Ulster District Council have joined forces to form the Mid South West (MSW) Region with the primary aim of creating the optimum conditions to attract investment and drive economic growth.

To realise this ambition, they have developed a Regional Economic Strategy (RES) which has identified the areas where funding can be most effectively invested to address a range of challenges and ultimately boost

economic growth opportunities.

Launched at a socially-distanced event at Edge Innovate in Dungannon on 9 September 2020 by First Minister Arlene Foster MLA and deputy First Minister Michelle O'Neill MLA, the strategy was developed following extensive research and analysis of the region's economy and was informed by engagement with the major employers located in the region.

Further collaboration from both local and central government will be necessary to help make, shape and support the case for change.

"The Regional Economic Strategy has been borne out of collaboration across the councils, across sectors and across geographies," Councillor Robert Irvine, Chair of the Mid South West Region

Governance Steering Group, said. "Its success relies on the continued input from all stakeholders to help keep our growth trajectory on course and to feed back on the needs of businesses operating in an ever-changing world.

"By working closely together over the next few years we will be able to boost productivity in the Mid South West Region and create more and better jobs. This region has proved itself to be the engine room of the Northern Ireland economy; our aim is to turbocharge the engine and create a more prosperous future for everyone."

The strategy identifies challenges and opportunities for the region and sets out four pillars to guide investment and grow the collective economy. The pillars are: future proofing the skills base, enabling



infrastructure, boosting innovation and digital capacity and building a high performing tourism economy. By focusing on these areas, the overriding goals of increasing productivity, driving business growth, fully realising sectoral strengths and opportunities, creating more and better-paid jobs and ensuring the ongoing internationalisation of MSW can be achieved.

Implementation of the RES will enable the Mid South West Region to leverage financial investment from a range of sources, such as the Growth Deal funding announced recently by the UK Government and Northern Ireland Executive, the PEACE PLUS Programme, the UK Government's Shared Prosperity Fund, Innovate UK and other central government funding.

"We have a once-in-a-lifetime opportunity to create an even better place to live, work and invest across the Mid South West Region," Councillor Irvine adds. "This co-ordinated, bottom-up approach ensures that we will leave no stone unturned in our pursuit for economic growth and we call upon all stakeholders across all sectors including the public, private and education sectors, to join us in putting a shoulder to the region's economic wheel."

The Mid South West Regional Economic Strategy in detail

The Regional Economic Strategy sets out a path to grow the economy of the Mid South West Region and Northern Ireland. It was an important initiative when work first began on it in 2018 and it's even more important now as the region deals with the economic effects of and recovery from the Coronavirus pandemic.

"The strategy has been developed in close consultation with government departments and agencies, Invest

Northern Ireland, Tourism Northern Ireland, skills bodies, business representative groups, educational institutions, universities and, crucially, businesses from a wide range of sectors."

The key to its success is putting businesses and the MSW economy at the heart of plans to ensure that funding support, whether public or private, is invested in the most responsible and effective manner.

Significant investment will be required to deliver the strategy with a total commitment to date of a quarter of a billion pounds towards a Growth Deal



from the UK Government and the Northern Ireland Executive. As previously stated, MSW will also pursue a range of other funding opportunities, such as investment through PEACE PLUS and the Shared Prosperity Fund, to name a few.

The strategy is structured around four intervention pillars:

1. 'Future Proofing' the Skills Base
2. Enabling Infrastructure
3. Boosting Innovation and Digital Capacity
4. Building a High-Performing Tourism Economy

The interventions will be geared towards delivering exponential and long-term benefits including:

- increasing productivity levels and closing the productivity gap;
- driving business growth;
- protecting our unique sectoral advantages and realising sectoral opportunities;
- creating more, better paid jobs;
- rebalancing the regional economy;
- increasing our global impact and underlining the benefits to the Northern Ireland economy.

The MSW pillars

'Future Proofing' the Skills Base

Future proofing the skills base is becoming ever more important and was a top priority emerging from engagements with businesses during the development of the RES. MSW wants to ensure the requisite skills are available in scale and profile to underpin the region's ambitions and those of the successful businesses which already exist there.

As well as requiring significant financial investment, the strategy seeks to drive change in four policy areas:

- access to labour/lobbying for a differentiated migration policy;
- policy changes to 'off-the-shelf' apprenticeships;
- extending the range of higher-level apprenticeships and degree apprenticeships available in the region; and
- a greater focus on shared apprenticeship schemes.



"We want to make it a positive moment in our history. the beginning of something transformative which builds on the region's creativity and innovation."

Enabling Infrastructure

Investment in infrastructure is critical to drive economic growth across MSW. Strategic road infrastructure enables businesses in the region to access all areas including ports and distribution points. The strategy has pinpointed where improvements are needed: the Armagh East Link; the A29 Cookstown bypass, the A4 Enniskillen Southern bypass, as well as the development of the A3 Armagh North & West Link, the A29 Dungannon bypass and the A32 Omagh to Enniskillen.

Investment will also be targeted at:

- addressing broadband, mobile coverage and reliability;
- transforming our high streets to be places of choice for our local communities;
- enabling access to available industrial land;
- driving investment in electricity supply; and
- supporting opportunities for regeneration and site development.

Boosting Innovation and Digital Capacity

Advanced manufacturing is one of MSW's big success stories and has enormous potential. The region is placing its ambitions in this area into the Northern Ireland-wide 'ecosystem' and at the centre of what is being discussed within the City/Growth Deals (i.e. the Advanced Manufacturing Innovation Centre in the Belfast Region City Deal and the Centre for Industrial Digitalisation, Robotics and Automation in Derry/Londonderry City Region). The ambition is to create an innovation and skills academy delivered by the South West College in Dungannon. In relation to agri-food, the impact of the strategy is global. The RES will support CAFRE in the development of a Northern Ireland Agri-food Robotics Centre at the Loughry Campus and work in collaboration with AFBi to develop a centre for Agri-Tech Innovation. It will develop agri-food incubation space to support food development for smaller SMEs, an area currently being explored by the Southern Regional College. The strategy also sets out plans to develop a network of Digi-Hubs to support the sector's growth. In addition to exploring

a number of potential health innovation proposals with the region's two leading and acute teaching hospitals, MSW is also exploring a new-build Health and Care Centre in Cookstown.

Building a High-Performing Tourism Economy

The MSW has a host of tourism offerings: the Fermanagh Lakes, the Sperrins, our literary heritage, the cultural significance of Ireland's oldest city, Armagh, where Patrick established his first church, the Ulster American Folk Park, Marble Arch Caves UNESCO Global Geopark and more besides, including the recent announcement of the commitment to the Game of Thrones Legacy Project.

MSW's aim is to invest in the development of its tourism product, including cross-border, in actions that stimulate/de-risk and expedite quality hotel investment as well as improving infrastructure for routing/ signposting and visitor engagement.

The future

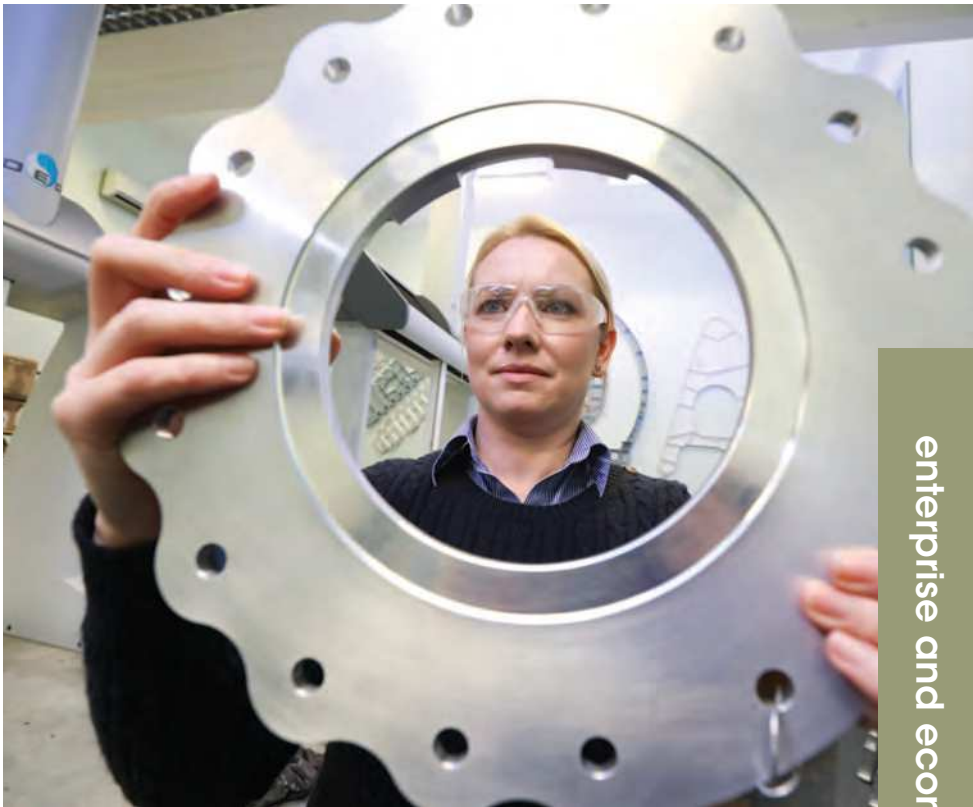
MSW has already engaged extensively with businesses and key sectors, with politicians locally, regionally and nationally, with central government, with education and the wider stakeholder community, and that will continue.

"We will continue to work closely with the other Northern Ireland City/Growth Deal regions to ensure complementarity and to take advantage of any synergies which may exist and continue to welcome the input and guidance of our industry/business base," Councillor Irvine explains. "We need their continued engagement with this initiative as we move through the next stages in development.

"The collaboration of our three councils to develop the Mid South West Regional Economic Strategy is a model of what can be achieved by people working together for the common good. We are living in truly life-changing times. In years to come, people will look back on 2020 and the Coronavirus pandemic and see it as a challenging experience for us all.

"We want to make it a positive moment in our history. The beginning of something transformative which builds on the region's creativity and innovation."

For further information:
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Twitter: @MSW_Region





The Mid South West Region

How the business world is critical in helping the **Mid South West Regional Economic Strategy** reach its aim of supercharging the region's economy

Companies have an important role to play in supercharging the Mid South West's (MSW) economy as part of a unique collaboration between three of Northern Ireland's most dynamic councils.

That's the conclusion of the Mid South West Regional Economic Strategy which has been developed with the aim of boosting productivity across the three council areas of Armagh City, Banbridge and Craigavon Borough Council, Fermanagh and Omagh District Council and Mid Ulster District Council.

The input from businesses across a range of sectors has been instrumental in helping to shape the strategy by identifying areas where investment is needed to allow them to grow unimpeded and their continued input will be vital as the strategy is rolled out in the coming

months and years, according to councillor Robert Irvine, chairman of the Mid South West Region Governance Steering Group.

"Business sits at the heart of this strategy and will be fundamental in ensuring that the Mid South West's economy flourishes in the future," he said. "We have geared the actions identified in the strategy towards addressing business needs and areas of deficit in order to provide businesses, that are already proficient, with the optimum conditions for them to maximise their potential, not just locally but internationally. By targeting investment we will reinforce the region's sectoral strengths in manufacturing, engineering, agri-food, health and life sciences, tourism and construction as well as in a fast-growing digital tech sector.

"The Mid South West Business Reference Group has provided invaluable insight into the

development of the strategy and will continue to play an important roll in its delivery. Our ambitions for the Mid South West economy are far reaching, but we are confident that with the support of businesses and all stakeholders in the region they are wholly achievable."

The Mid South West Regional Economic Strategy identifies challenges and opportunities and sets out four pillars to guide investment and grow the collective economy. The pillars are: future proofing the skills base, enabling infrastructure, boosting innovation and digital capacity and building a high performing tourism economy.

By focusing on those areas, the overriding goals of increasing productivity, driving business growth and competitiveness, fully realising sectoral strengths and opportunities, creating more and better-paid jobs and

ensuring the ongoing internationalisation of MSW can be achieved.

The strategy will enable the Mid South West Region to leverage financial investment from a range of sources – such as the £250m Growth Deal funding committed by the UK Government and Northern Ireland Executive,

the PEACE PLUS Programme, the UK Government's Shared Prosperity Fund, Innovate UK and other central government funding.

The strategy was launched by First Minister Arlene Foster MLA and deputy First Minister Michelle O'Neill MLA at a socially-distanced event held near Dungannon at the premises

ECONOMIC STRATEGY

of EDGE Innovate, one of the companies represented on the Business Reference Group.

For further information: Email: info@midsouthwestregion.org, visit the website at midsouthwestregion.org or check out Twitter @MSW_Region

THE MSW PILLARS

'Future proofing' the skills base

Future proofing the skills base is becoming ever more important and was a top priority emerging from engagements with businesses during the development of the regional economic strategy. MSW wants to ensure the requisite skills are available in scale and profile to underpin the region's ambitions and those of the successful businesses which already exist there.

As well as requiring significant financial investment, the strategy seeks to drive change in four policy areas:

- access to labour/lobbying for a differentiated migration policy;
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The future

MSW has already engaged extensively with businesses and key sectors, with politicians locally, regionally and nationally, with central government, with education and the wider stakeholder community, and that will continue.

"We will continue to work closely with the other Northern Ireland City/Growth Deal regions to ensure complementarity and to take advantage of any synergies which may exist and continue to welcome the input and guidance of our industry/business base," Councillor Irvine explains. "We need their continued engagement with this initiative as we move through the next stages in development.

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INFRASTRUCTURE/ CONNECTIVITY PAPER

**Discussion of 'Key Messages and Asks' with MSW Region
Governance Steering Group Meeting**

Purpose of Paper

- To facilitate positive and constructive dialogue with the UK Government and the NI Executive.
- In respect of one 'core' ask i.e. flexibility in the financial construct of MSW Growth Deal funding.
- And four other 'related asks', relevant to the centrality of 'infrastructure and connectivity' investment to achieving the ambitions of the Regional Economic Strategy (RES).
- Word document will be converted to professional brochure format.

Structure of Paper



Section 1: Purpose of Paper – *which also includes a summary of the ‘asks’*

Section 2: Introduction to the MSW Regional Economic Strategy (RES) Development Process – *which outlines the centrality of prevailing infrastructure and connectivity deficits to all of the ambitions and plans within the RES*

Section 3: A short profile of the MSW region as the ‘Economic Engine’ of NI.

Section 4: ‘Headline’ Ambitions of the RES

Section 5: Prevailing Infrastructure and Connectivity Deficits – *evidenced-based*

Section 6: The ‘Ask’ of Government / Next Steps

Providing the ‘economic evidence’ of the growth potential that MSW can deliver not just for NI, but in a wider UK and island of Ireland context....but that this is however contingent on actions to address the serious infrastructure and connectivity deficits in our region

‘Takeaway’ Points

Prior to the ‘asks’ the paper is seeking to build awareness and understanding of the following points with the audience:-

- *The MSW region is well-behind the ‘baseline’ position in terms of basic infrastructure and connectivity relative to the other City Deal regions in NI.*
- *Actions to address infrastructural and connectivity deficits are both a pre-requisite and ‘rising tide’ for our ambition across all sectors in MSW.*
- *We already have world-leading capacity and evident potential for further growth, that will benefit NI as whole – as well as the wider UK and Island of Ireland economies.*
- *As a region we are now in the very early stages of the new trading environment of the post-Brexit era. Access to effective trade pathways in a North/South (island of Ireland) and East-West (GB mainland) context has never been more critical for our region.*



‘Takeaway’ Points (Cont.)

- *Our region thus far has not sufficiently experienced the benefits of previous policy to ‘regionally-balance’ the NI economy, despite our performance and contribution as the ‘economic engine’ of the same.*
- *Forward UK and NI policy has an increasing focus on ‘levelling-up’ and ‘regional balance’ – which represents an opportunity to significantly improve the benefits that our region can experience in future.*



‘Takeaway’ Points (Cont.)

- *We are already working positively and collaboratively with the other City/Growth deals across NI, where synergies exist and to prevent duplication of activity at an NI-wide level.*
- *In citing that we are not starting from the same ‘baseline’ position as the other City deal regions, we do not wish in any way to detract from their ambitions and plans, which alongside ours will greatly benefit NI as a whole.*
- *However, it is important that it is recognised that our RES (and Growth Deal) does sit within a different baseline context.*
- *Allied to this, the risk exists that if there is not significant movement on the issues highlighted above, then we may never be able to fully ‘level-up or achieve ‘regional balance’ commensurate with the evident growth potential in our region.*



ASK No 1: Flexibility in the Financial Construct of the MSW Growth Deal Funding



Contextual Points

- Unlike the other City Deal regions in NI, we did not have an opportunity to influence and negotiate upon the financial construct of the Growth Deal for MSW
- The ethos of a City Deal is intended to give a city/ region, greater powers and freedom to take charge and responsibility of decisions that affect their area. In addition to do what they think is best to help their businesses grow and to create the optimal environment for economic growth. And against all of this potential to input on how best public money aligned to the Deals should be spent.
- We have identified needs bespoke to our region, through a comprehensive industry/ business-led process, that in keeping with the ethos above should have shaped a bespoke financial construct within the Growth Deal arrangements.



ASK No 1: Flexibility in the Financial Construct of the MSW Growth Deal Funding



Contextual Points

- £126m of Growth Deal funding was pledged by the UK government for the MSW in the 2020 Budget Statement. This is specifically to support investment in 'Innovation and Digital' Activity.
- This will be matched by £126m from the NI Executive which can fund activity across all intervention themes.
- The total confirmed Growth Deal package for MSW is therefore £252m, not with-standing local authority contributions and private sector matched funding contributions.



ASK No 1: Flexibility in the Financial Construct of the MSW Growth Deal Funding

- A 50/50 balance of emphasis between investment in ‘Innovation and Digital’ and all other investment areas in the Growth Deal, fails to recognise the critical importance of investment in infrastructure and connectivity in our region for all of our ambitions.
- For instance, if this was shifted to 30/70*, this would enable us to bring forward a prioritised list of some of the infrastructure and connectivity projects within our RES. Which in turn will unlock significant productivity gains and economic growth potential in MSW.
- The above suggested split, is a starting point for discussions and negotiations, and could be further informed by project prioritisation and future business case work.

** That is 30% of funding for investment in ‘Innovation and Digital’ and 70% for all other investment areas in the Growth Deal*



“One size does not fit all”

ASK No 2: Action to Redress Infrastructural and Connectivity Deficits in MSW in the Forward Programme for Investment in Public Infrastructure

New Infrastructure Strategy NI



Updating the Regional Strategic Transport Network Transport Plan (RSTN TP).



Our 'ask' is that the forward actions that arise from each fully embrace the policy imperatives of 'levelling-up' disparities between UK regions and achieving 'regional balance' within NI.

This focus is critical for us to redress the serious infrastructural and connectivity deficits in MSW and to unlock the productivity gains and economic growth that our region will deliver as a result.

ASK No 3: Broadband Infrastructure Improvements / Partnership Working on Project Stratum Roll-Out in MSW



- As our region is 'furthest behind' in terms of broadband connectivity in NI currently, timely roll-out of Project Stratum is absolutely critical for us.
- We ask DfE to continue to work in partnership with us on the planned roll out of Project Stratum as it relates to the three Council areas in MSW.
- Also, in respect of the actions to include premises that currently are out of scope in MSW

Ask No 4: Targeting of Policy Levers and Investment Approaches to Underpin Growth of World-Leading Sectors



- *Our 'ask' is that government acknowledge that their sectoral ambitions for NI as expressed in the draft Industrial Strategy/ Economy 2030 will be constrained if the basic deficiencies in our economic infrastructure and connectivity are not addressed – because our region/MSW brings much of the world class capability in NI in four out of the priority six sectors identified.*
- *Consequently, we expect that government will use the various policy levers and investment approaches at their disposal to target resources into the economic infrastructure and connectivity necessary to reinforce these sectoral ambitions.*

Ask no 5: Single Point of Contact / Lead for Regional Balance and Levelling-Up Policy Agenda



- As a region we have fostered cohesion amongst our industry/business champions, political and civic leaders for the ambitions and proposals within our RES.
- Our governance structures were set out from the outset to facilitate this and as a result we speak 'with a single unified voice' on the needs of our region and ambitions / plans for the same.
- Our experience of working with partners in central government is by contrast often fragmented in that different perspectives and approaches exist, that constrain an optimal approach to delivering upon the evident growth potential of our region.
- Looking ahead our 'ask' is for a single point of contact within both the NI and UK government structures, in respect of the 'regional balance' and 'levelling-up' policy imperatives respectively.
- This would greatly simplify our interaction with both and help co-ordinate plans and approaches across various Government Departments/ agencies necessary to realise the implementation of our RES.



FEED BACK / QUESTIONS?