

CONTENTS

	Page
Introduction	1
Chapter 1 - An Outward Looking Region	2
Chapter 2 - Population	4
Chapter 3 - Housing	8
Chapter 4 - The Economy	10
Chapter 5 - Tourism	16
Chapter 6 - Transport	20
Chapter 7 - Education and Skills	24
Chapter 8 - Environment	27
Chapter 9 - Social Trends	31
Chapter 10 - Infrastructure	34
Information Sources	37

INTRODUCTION

The Regional Baseline is one of three background reports which accompany the publication of the Draft Regional Strategic Framework for Northern Ireland. The Regional Strategic Framework seeks to set directions for the future development of the Region to 2025 through a shared vision which emerged from an extensive public consultation exercise. While the Strategy takes account of a number of driving forces for change, it is not based on past statistical trends but seeks to influence future patterns of development in accordance with a number of guiding principles (Chapter 3 of the Draft Regional Strategic Framework). The Regional Baseline report is not therefore intended as part of the justification of the draft Regional Strategic Framework. Neither is it an exhaustive fact file of the current state of the Region. It is, rather, a compendium of key information collected during the RSF process which will provide a series of statistical snapshots of the major topics covered by the Strategy.

CHAPTER 1: AN OUTWARD LOOKING REGION

Geographical Context

Northern Ireland is situated on the north western periphery of Europe, forming part of the Atlantic Transnational Area within the European Union. It has a land area of 14,153 sq. km (5262 sq. miles), half the size of Belgium, one-third the size of Denmark, and one-sixth of the area of the island of Ireland.

The population of the Region was estimated at 1,663,300 in 1996. Belfast, is the regional capital, with a population of around 600,000 in the Metropolitan Area and is by far the dominant urban centre. Outside the Metropolitan Area, the Region is largely rural in character and has a relatively low population density in European terms.

Rural Northern Ireland is served by 20 Regional Towns ranging in size of population from Derry/Londonderry in the North West with around 85,000 people in 1996; Craigavon in mid-Ulster with around 54,000 people; to Ballycastle on the north Antrim coast with around 4,500 people. These towns form a well-developed network extending across Northern Ireland, and acting as centres for the delivery of administrative functions and urban services.

Geographically, the heart of the Region is Lough Neagh, the largest freshwater lake in the British Isles. Its lowlands dominate the centre of the Region and are surrounded by a discontinuous rim of uplands. The landscape is predominantly lowland, with 75% of the area being below 150 metres, affording relatively easy access by road, around the Region.

The location of Northern Ireland creates a sense of physical remoteness from the major population and economic centres of Europe. Trends in the modern economy suggest that the impact of distance will lessen, with rapid improvements in information and communications technology, as trade in manufacturing goods becomes less bulk oriented, and as tradable services grow in importance.

Developments in communications have also considerably reduced the perception of peripherality of Northern Ireland in Europe. The sea, once regarded as a barrier to communication, with modern handling methods offers a choice of regular routes to Great Britain and to Europe clear of the congestion of Southern England.

Northern Ireland has good modern port facilities providing high quality shipping services and freight handling, which are essential for economic competitiveness and the convenience of the travelling public. The Region's ports provide the main gateway for goods to and from Northern Ireland's external markets and suppliers.

Improvements in land routes by road and rail to the Republic of Ireland have improved connections within the island. Air services provide frequent, regular links to Great Britain, and there are a limited number of direct flights to the Republic and mainland Europe. Since 1971 air travel to and from the Region has increased by 4.8% per annum.

The state of the Region's infrastructure and in particular its external linkages are important factors in counteracting the perception of peripherality. Significant resources have already been channelled into the Region's transport, communications and energy networks. Among recently completed infrastructure projects, which specifically improve external linkages, are:

- improvements to cargo handling and passenger facilities at Belfast Harbour;
- new cargo and passenger facilities at Belfast International Airport;
- improvements to road and rail links between Belfast and Dublin; and
- relocation of the port of Derry/Londonderry to Lisahally

Proposed changes to membership of the European Union will lead to an increase in the size of the Union and an easterly expansion of its territory offering competition but also trading opportunities with many more regions within Europe. The Region also has strong cultural and economic linkages with North America and other parts of the world, offering potential trading and tourism benefits.

CHAPTER 2 : POPULATION

Population trends

The population of Northern Ireland was estimated at 1,663,300 in 1996, an increase of around 62,000 since 1991. This population estimate exceeds the previously recorded peak in 1841, immediately before the Famine.

Since the mid-1970s population growth in the Region has consistently exceeded that of the United Kingdom as a whole, and the regional rate of growth is now more than double the national rate.

Northern Ireland contains around 0.5% of the population of the European Union, 2.8% of the population of the United Kingdom, and 32% of the population of the island of Ireland.

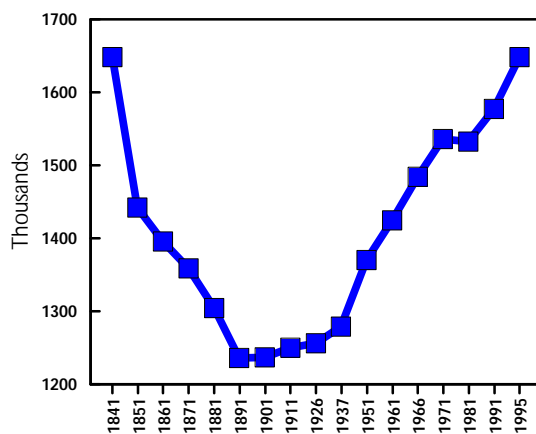


Diagram 1: Change in Regional Population

Components of population change

Northern Ireland has the highest birth rate of any region in the United Kingdom and the second highest of the 78 regions in the European Union. The 1996 live birth rate of 14.8 per thousand population compares with 12.5 in Great Britain and 10.9 in the European Union.

The death rate of 9.1 per thousand population in 1996 is lower than England and Wales and is one of the lowest in Europe. This is indicative of the youthful age structure of Northern Ireland's population. Other measures of mortality, such as life expectancy and age specific mortality rates, indicate that the Region has higher mortality than England and Wales but lower than Scotland.

Out-migration has been a long established, though fluctuating feature of the Region. This has tended to decline since the mid-1980s and in the 1990s has been replaced by modest levels of in-migration, contributing to the rapid rise in the Region's population after 1991.

Northern Ireland has the most youthful population in the United Kingdom and, with 24% of the population under 15 years in 1996, the second most youthful population of any European region with the exception of the Irish Republic. Only 13% of the regional population were 65 years of age or over in 1996, one of the lowest proportions in Europe.

Table 1: Comparative Age Structure of the Regional Population 1994

	0-14 years	15-64 years	65+ years
Northern Ireland	24.1%	63.2%	12.7%
Republic of Ireland	25.3%	63.3%	11.4%
United Kingdom	19.4%	64.8%	15.8%
European Union	17.6%	67.0%	15.4%

Source: Regional Trends 32

Population Distribution

In 1996 it is estimated that around 600,000 people (36% of the Region's population) lived in the Belfast Metropolitan Area; around 420,000 (25%) lived in the Regional Towns, and around 650,000 (39%) lived in the Rural Community of small towns, villages and the open countryside.

Table 2: The Changing Distribution of Population 1971-1996

Location	1971	1981	1991	1996	% Change 1971-96	% Change 1991-96
Belfast City Council area	416,679	314,270	279,237	297,300	-28.7	6.5
Carrickfergus urban	23,205	23,990	27,877	30,600	31.9	9.8
Castlereagh urban	59,700	55,181	52,982	54,800	-8.2	3.4
Lisburn urban	48,400	61,951	70,558	76,300	57.6	8.1
Newtownabbey urban	56,500	59,273	59,200	62,600	10.8	5.7
North Down urban	49,056	62,378	67,943	70,350	43.4	3.5
Belfast Metropolitan Area	653,540	577,043	557,827	591,950	-9.4	6.1
Derry/Londonderry	67,504	70,579	76,100	84,200	+24.7	+10.6
Craigavon	50,341	53,808	52,405	53,750	+6.8	+2.6
The Regional Towns	214,827	251,387	270,274	281,150	+30.9	+4.0
Derry/Londonderry, Craigavon and the Regional Towns	332,672	375,774	398,779	419,100	+26.0	+5.1
Small Towns	134,482	159,071	187,874	204,100	+51.8	+8.6
Villages	68,417	76,034	83,646	89,300	+30.5	+6.8
The Open Countryside	346,954	344,274	349,667	358,850	+3.4	+2.6
The Rural Community	549,853	579,379	621,187	652,250	+18.6	+5.0
Northern Ireland Total	1,536,065	1,532,196	1,577,793	1,663,300	+8.3	+5.4

Significantly, between 1991 and 1996 the population of all three of these settlement groups was increasing, at around the rate of increase in the population of the Region as a whole. Growth in the population of the Belfast Metropolitan Area resumed after 20 years of decline, which led to a fall in population of around 100,000 between 1971 and 1991. Derry/Londonderry had buoyant growth of around 11% in the 1990s reflecting the success of the drive to regenerate the City. The population of the Rural Community increased by around 100,000 between 1971 and 1996 reflecting the dispersal of people from the main cities and towns in the Region into small towns, villages and the open countryside.

In 1996 it is estimated that around 22% of the Region's population lived in the open countryside in small rural settlements and dispersed dwellings, reflecting the strength of the rural tradition and its continuing importance in the life of the Region. Increase in the

population living in the open countryside between 1991 and 1996 was a significant reversal of a long-term trend in the decline of rural population in the Region.

A Divided Society

The effect of the 'troubles' has been to produce an increasingly polarised community and the 1991 Census revealed that more than half of the Region's population lives in areas that are more than 90% Catholic or Protestant. Recent information from the Continuous Household Survey 1997-1998 suggests 42% of the population could be classified as Roman Catholic, and 54% as Protestant.

CHAPTER 3 : HOUSING

Households

Between 1971 and 1996 the number of households in the Region increased by around 154,000 (36%) to 582,000, compared to a rate of population increase of just over 8%.

The main force behind the growth in the numbers of households has been the rapid increase in small households due to social changes such as declining family size, an ageing population, the increasing incidence of marital breakdown, and the growing independence of young people. Between 1971 and 1991 the numbers of one and two-person households increased from around 170,000 to over 250,000. The proportion of large households declined; those of 5-persons or more fell by 15%.

These trends have been reflected in the progressive reduction in mean household size from 3.49 in 1971 to 2.90 in 1991. This decline mirrors the trend in Great Britain with a time lag of 20 years.

Housing

Between 1971 and 1996 the number of dwellings in the Region increased from 455,000 to 607,000, a 33% increase compared to only an 8% increase in population. In 1996 Northern Ireland had 2.5% of the United Kingdom dwelling stock.

237,000 new dwellings were completed in the Region between 1971 - 1996 of which 139,000 (59% of the total) were by the private sector, and 89,000 by the Northern Ireland Housing Executive. In the 1990s house completions have averaged around 7,500 per year based largely on a dynamic private sector responding to a continued high level of household formation.

In 1996 nearly 40% of the housing stock was less than 25 years old. Only 20% of the dwelling stock was constructed before 1919. 31% of Northern Ireland's housing stock is pre-1945 and 47% is post-1965, compared with 46% and 22% respectively in Great Britain.

There has been a continuous and rapid increase in home ownership since 1961. In 1996 around 70% of the housing stock was owner-occupied. Public renting has fallen from 39% in 1981 to 24% in 1996.

There has been a substantial transfer of housing stock from the public to the private sector by the sale of dwellings to tenants. Since 1979 over 70,000 dwellings have been transferred to owner-occupation, with a scale of transfer of around 4,500 in recent years.

In 1996 houses and bungalows made up the majority of Northern Ireland dwelling stock (91%), with purpose built flats accounting for almost 7%, and flats in converted buildings making up the remaining 2% of dwellings. Terraced houses accounted for 33% of the stock, 18% were semi-detached houses, 16% were detached houses, and the remaining 24% were bungalows.

In 1996 about 44,000 dwellings were unfit, 7.3% of the stock compared to 7.5% in England. The unfitness level of the housing stock has reduced from 11% in 1987. Just over half of the total unfit dwellings were owner occupied.

More than half of all unfit dwellings (52%) were located in rural areas. Almost 2 unfit dwellings in 5 were located in the more isolated rural areas.

Houses in the Countryside

An estimated 25,000 houses have been built in the open countryside between 1983 and 1993, reflecting the pressures for housebuilding in the rural parts of the Region.

The numbers of planning approvals for rural dwellings in the late 1990's is now commensurate with the high levels of approval prevalent in the late 1970's / early 80's, immediately following the relaxation of the rural planning policy in 1978. Indeed, apart from 1979, the highest approval rate for any one year is 1996, with trends of the past ten years suggesting that the 1979 record will be surpassed in 1997.

Not only has there been a significant and steady increase in the numbers of rural approvals over the period 1991-1996 (a 60% rise in that period), but there has also been a marked percentage shift in the spatial distribution of these approvals.

In 1987, 50% of rural planning applications were within the 13 district council areas in the east of the Region, which made up the former Belfast City Region, that is, a major concentration of rural development within just 25 miles of Belfast city centre. In 1996 this percentage has dropped to 31% of applications and 29% of approvals in the open countryside. Recent trends would suggest that this will continue to reduce as the number of applications and approval rates increase in the west.

Energy

Overall, 523,800 properties had central heating, representing 87% of the total dwelling stock.

The use of oil as a heating fuel type has increased markedly since 1991 rising from 21% to 36% in the occupied stock and there has been a corresponding reduction in the use of solid fuel as the main heating source (61% overall in 1991 compared to 39% in 1996). The introduction of natural gas to Northern Ireland began in 1996 with installation commencing in the Belfast Metropolitan Area.

Nearly half of all dwellings had wall insulation, nearly one-quarter had full double-glazing, nearly two-thirds had roof insulation more than 100 mm thick, over four-fifths had hot water cylinder insulation, but only one-tenth had low energy light bulbs.

CHAPTER 4 : THE ECONOMY

Economic Performance

Throughout the 1990's the regional economy has performed well, outpacing the United Kingdom as a whole in the rate of employment growth and the increase in Gross Domestic Product (GDP) per capita.

In the ten years to 1996, real GDP per head in Northern Ireland increased by over 23% compared to 19.9% for the United Kingdom as a whole over the same period. However, Northern Ireland's ranking in terms of GDP per head remains bottom of the United Kingdom regional league, reflecting the lower proportion of the population in work and the lower levels of productivity of those in work.

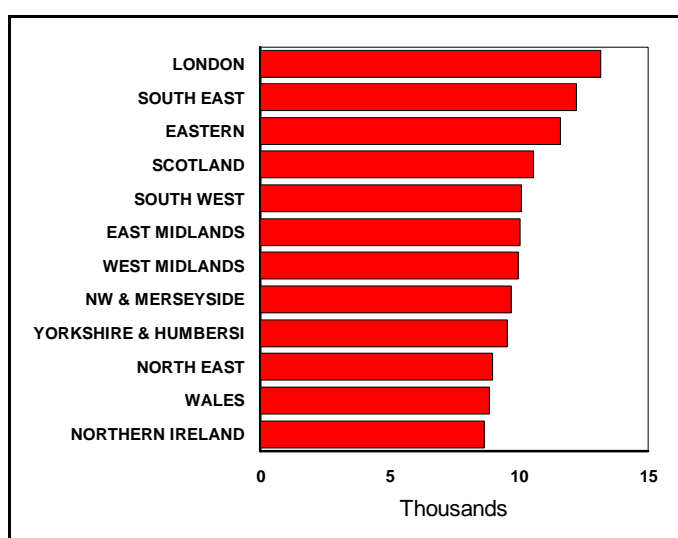


Diagram 2: Gross Domestic Product per Head for UK Regions 1996

Northern Ireland has achieved some degree of convergence in recent years, with GDP per head as a percentage of the United Kingdom average rising from 76.8% in 1988 to 81.2% in 1996.

Table 3: GDP per head in Northern Ireland 1986-1996

	£	Real Growth	% of UK average
1986	4,467	-	79.4
1987	4,784	2	77.7
1988	5,303	4.5	76.8
1989	5,832	2.2	76.9
1990	6,396	1.8	78
1991	6,930	2.4	81.7
1992	7,205	-1	81.7
1993	7,620	2.3	82.1
1994	7,974	3.3	81.6
1995	8,423	3.5	82.6
1996 *	8,700	0.1	81.2
TOTAL		23	

Source: Economics Division Report March 1998 (provisional figure)

In 1995/96 exports of Northern Ireland manufacturing firms increased by 18%, compared with 14% for the United Kingdom as a whole. Exports now account for 35% of total sales by the manufacturing sector, a substantial increase from 28% in 1991/92.

Wage levels are below the United Kingdom averages for men and women, manual and non-manual workers. The average weekly wage in Northern Ireland in 1997 was £320, compared with £368 in Great Britain.

Sectors of the Economy

The service sector continues to dominate the regional economy, contributing 67.7% GDP in 1996.

Manufacturing output rose sharply in 1997 and again outperformed the rest of the United Kingdom. In 1997 manufacturing output increased by 5.8%, compared with an increase of 0.9% in the United Kingdom as a whole. In 1996 manufacturing represented over 19.1% of GDP in Northern Ireland. Fastest growing sectors were engineering, chemicals and metal fabrication. Textiles output fell by 1.7%.(1997).

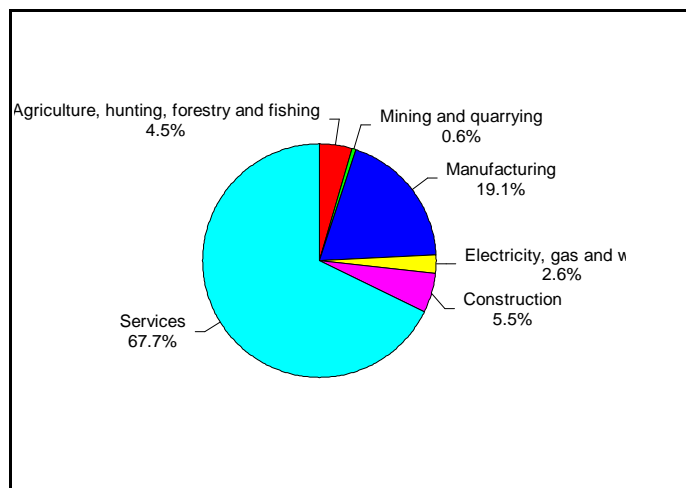


Diagram 3: GDP by Industrial Sector 1996

Agriculture contributes 5% to GDP and 6% to employment in Northern Ireland, more than twice the United Kingdom average.

Table 4: GDP by Industrial Sector (expressed as % of total)

	1986	1991	1996(*)
Agriculture, hunting, forestry and fishing	4.2	4.3	4.5
Mining and quarrying	0.5	0.5	0.6
Manufacturing	20.6	20.1	19.1
Electricity, gas and water	3.9	3.3	2.6
Construction	6.2	5.8	5.5
Services	64.6	65.9	67.7

(*provisional figures)

Source ONS / Economics Division Report - The NI Economy

Employment

Civilian employment has grown steadily, increasing by 14% between 1986 and 1996 to 574,160.

The economic activity rate is 59.3% compared to 62.3% for the United Kingdom. Activity rates for men are 1% behind the United Kingdom average while the female rate lags by 5%. The number of females employed exceeds the numbers of males.

The largest growth in employment has been in the service sector, which increased by 45% between 1971 and 1997. The service sector employs 437,180, accounting for almost 75% of all jobs. Manufacturing employment declined through the 1970's and 1980's, but has now stabilised at around 100,000, with a marginal increase in recent years. Northern Ireland remains overly dependent on the public sector which accounted for 37% of all employment in 1996 compared to 26% for the United Kingdom as a whole.

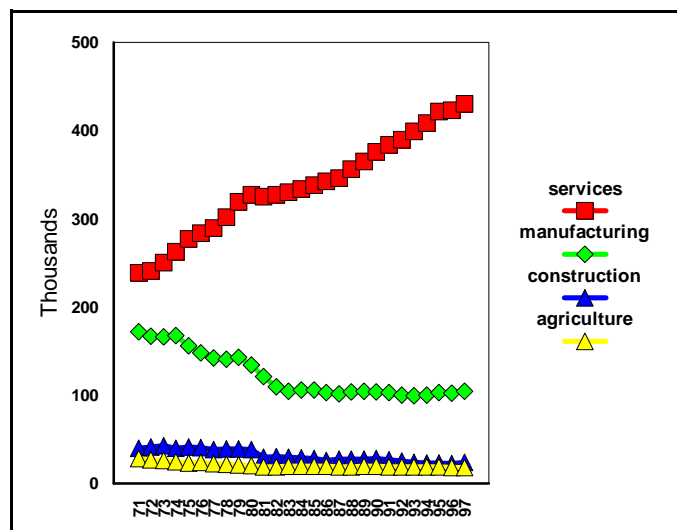


Diagram 4: Employees in Employment by Sector 1971-1997

Employment in agriculture, forestry and fishing has continued to decline gradually and in 1996 accounted for 6% of the working population. In 1996 there were 59,100 persons employed in agriculture, around 3% of all employees compared to around 1% in Great Britain.

There has been an increase in the share of part-time employment which now accounts for 32% of jobs. 23.7% of women employees work part-time compared to 8.3% of men.

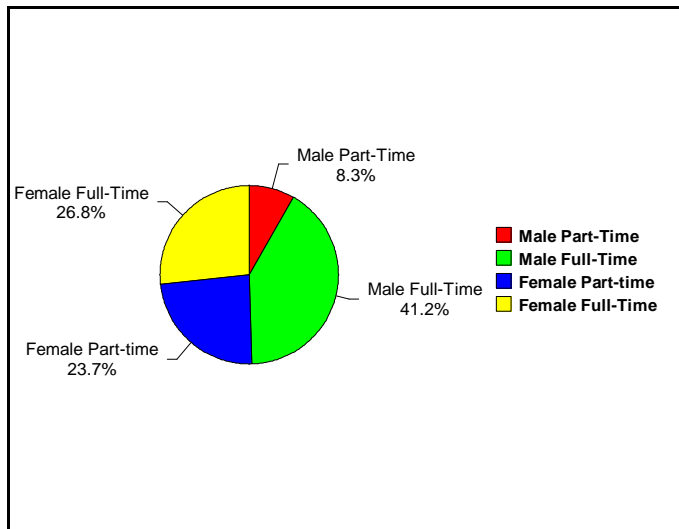


Diagram 5: Composition of Employee Jobs, December 1997

With firms employing less than 50 people accounting for 97% of all private sector businesses, small and medium sized enterprises (SMEs) are a vital component of the Northern Ireland economy. Employment in SMEs accounts for about 56% of total employment in the private sector compared to 4% in the United Kingdom as a whole.

Unemployment

Unemployment in 1997 was 53,000, 7.3% of the workforce. The rate has fallen steadily since 1993, and Northern Ireland no longer has the highest unemployment rate in the United Kingdom. The gap between the Northern Ireland rate and the United Kingdom average has closed considerably.

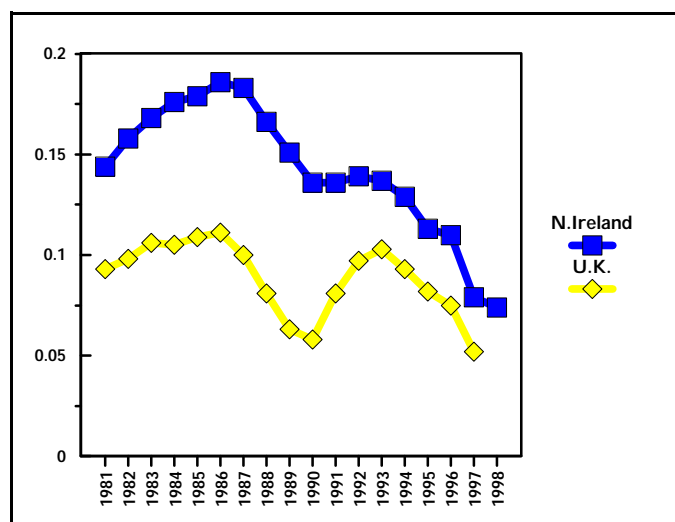


Diagram 6: Unemployment (claimant count unadjusted June)

Long term unemployment is much worse in Northern Ireland than in any other United Kingdom region and is higher than in the European Union as a whole. Long term unemployment is acute, with 52% of those unemployed in mid-1998, having been out of work for over a year.

Inward Investment

Inward Investment makes an important contribution to the local economy - in 1996 there were 195 externally owned companies operating in Northern Ireland which employ some 44,500 people.

Inward investment has been concentrated in manufacturing. Northern Ireland is particularly strong in the production of automotive components, medical technology products, micro electronics, software engineering and textiles.

Northern Ireland has a long tradition of attracting companies from the USA. In the last 5 years, 108 US-owned client companies have invested over £512m in Northern Ireland promoting around 3,500 new jobs.

1997/98 was a record year for inward investment with 41 new and expansion projects representing a total investment of £522m, promoting 5,064 new jobs and safeguarding a further 2,483 jobs.

Research and Development

Investment in Research and Development has increased by 31% over the period 1993 to 1996, compared with 4% for the United Kingdom. The level, estimated at 0.5% of GDP in 1996, is low when compared to major international competitors, and tends to be concentrated in large engineering firms.

Table 5: Comparative Investment in Research and Development 1995

County	% GDP
Japan	1.95
USA	1.85
Germany	1.51
UK	1.32
RoI	1.02
NI	0.5

The Higher Education institutes play an important role in strengthening the science base and bringing the knowledge generators closer to the technology practitioners. There are 14 university centres of research, covering a wide range of technologies, which have developed productive links with local companies.

Improving employability

Northern Ireland has a good network of 'gateway centres' providing employment services and training. There are 31 local offices and 10 training centres, providing a good distribution of employment and training services across the Region.

Agriculture

Almost 80% of Northern Ireland's land area is used for agriculture, and a further 6% for forestry. Grass or rough grazing is the predominant land cover (over 75%), with arable crops only accounting for less than 5%. The bulk of farmland in the Region is owner-occupied. Average farm size is 28 hectares in contrast to the United Kingdom average of 66 hectares.

The earliest recorded agricultural full labour force survey, in 1912, enumerated a total 214,000 persons. By the early 1960s this had declined to 115,000; with further reductions to 60,000 in 1996 - of which 40% were recorded as full time. With 28,000 farm business and 24,000 full-time farmers, the vast majority of farm workers are farm owners.

The farmers in Northern Ireland can be divided into three almost equal groups:

- those above the state retirement age;
- full-time farmers, below retirement age, who obtain all their income from their farming activity; and
- farmers below retirement age whose household income includes off-farm income of the farmer and/or spouse.

CHAPTER 5 : TOURISM

In 1997 there were 1.4 million visitors to Northern Ireland, staying a total of 7.5 million nights and spending an estimated £208m.

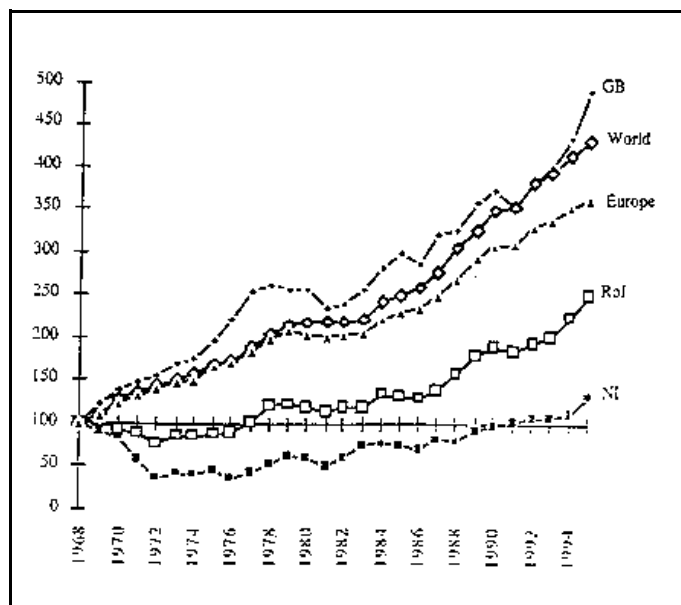
Spending by staying visitors and residents on holiday in the Region (1996) accounted for 2% of GDP, compared with 6.8% in the Republic of Ireland and 5.6% in the United Kingdom.

Approximately 12,500 people, or 1.8% of the workforce, are employed in domestic and visitor tourism in Northern Ireland. This contrasts with 6% of the workforce in the Republic of Ireland and 8% in Scotland.

Belfast had the highest revenue from tourist spend; 22.2% in 1996, followed by Coleraine Borough 12.8 and Fermanagh 6.5%.

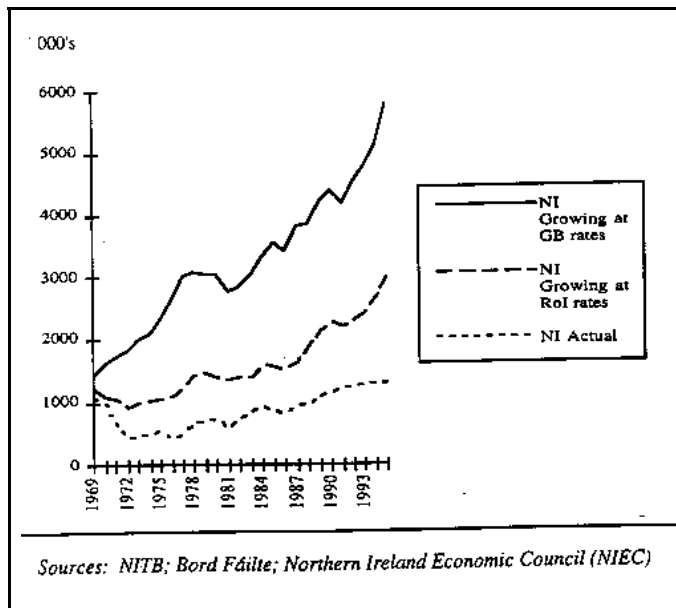
The growth in tourism has been less than that in Great Britain, and the Republic of Ireland. The average annual growth rate in Northern Ireland between 1968 and 1995 was only 1%, compared to growth rates of 3.5% in the Republic of Ireland and 6.1% in Great Britain.

Diagram 7: Tourist numbers 1968 to 1995 (index 1968=100)



If tourist numbers to Northern Ireland had grown at the rate which occurred in Great Britain since 1969, then by 1994 there would have been 5.1m tourists visiting Northern Ireland. Applying the Republic of Ireland growth rates to Northern Ireland over the same period would have resulted in 2.65m tourists. In 1994 1.294m tourists actually came to Northern Ireland.

Diagram 8: Tourism potential under different growth scenarios 1969 to 1995



Visitors and purpose of visit

Following the record year of 1995, there was a decline in visitor tourism for the first time since 1988. Numbers fell by 8% in 1996 and by a further 1% in 1997. There were 142,000 fewer visitors to Northern Ireland in 1997 than in 1995. The biggest decrease was in the ‘pure holiday’ visitor sector which recorded a 43% decline between 1995 and 1997.

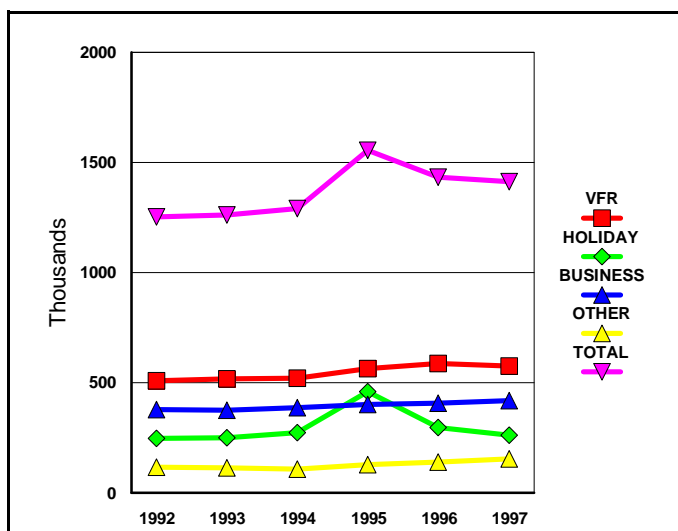


Diagram 9: Total Visitors by Purpose of Visit 1992-1997

The ‘Visiting Friends and Relatives’ sector constitutes the largest category of visitors - 577,000 (41%), compared to 419,000 (30 %) business visitors and 263,000 (18%) ‘pure’ holidaymakers in 1997.

Home holiday taking by Northern Ireland residents has tended to be variable with no long term trend emerging. A growth in the short break market (1-3 nights) has helped to increase the revenue generated by this important sector of the industry.

Britain and the Republic of Ireland are the main source of visitors representing 56% and 24% of total visitors respectively in 1997. North America and Europe represent 8% and 7.5% respectively, indicating the opportunity that exists to exploit these markets further.

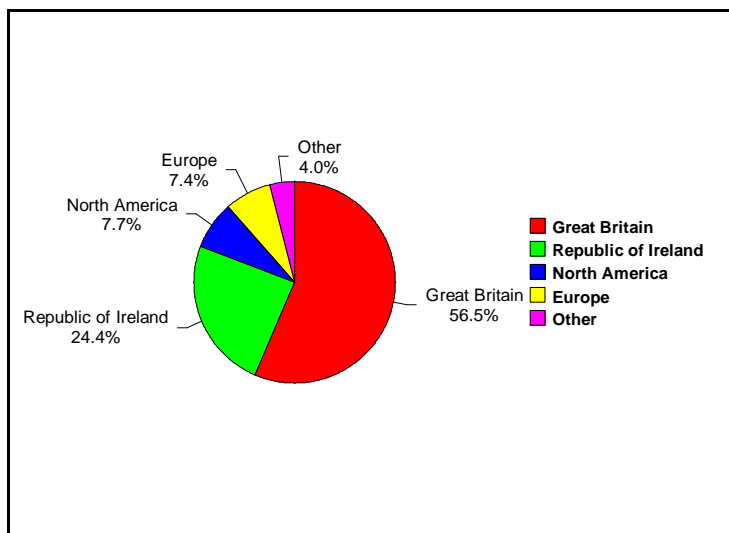


Diagram 10: Staying Visitors by Origin of Trips 1997

Accommodation

There were 29,333 bed spaces in the Region in May 1998. Of these hotels provide 34%, guest houses and bed and breakfast accommodation 43%, self-catering 15% and hostels 7%.

Six new hotels opened during 1996, bringing the total number of hotels to 135. This represented an 8% increase in the number of beds offered over the previous years stock. A further 3 hotels have opened in 1998; the 50 bedroom Newry Canal Hotel opened in March 1998, the 130 bedroom Stakis Hotel and golf resort at Templepatrick opened in June 1998, the 185 bedroom Hilton International at Laganside, Belfast in September 1998.

Attractions and Amenities

Northern Ireland contains a rich endowment of natural, cultural and heritage resources which are recognised and in some cases renowned on the European and world stage. All are within 130 kilometres of the major port, airport and gateways to the Region.

- Belfast and Derry/Londonderry are urban ‘magnets’;
- the Giant’s Causeway, a world heritage site;
- the Antrim Coast and Glens;
- the Mountains of Mourne;
- Enniskillen and the Fermanagh Lakeland;
- the Sperrins;

heritage towns such as Armagh, Carrickfergus and Downpatrick; and successful visitor centres at a number of industrial locations, such as Belleek pottery, Tyrone Crystal, and Bushmills Distillery.

The involvement of Derry/Londonderry port in the world cruise market has opened up new growth potential. The port of Belfast has also tapped into this expanding market area.

Opportunity offered by peace

Given a peaceful situation there is considerable potential for expansion in tourism in Northern Ireland. An indication of the growth potential is provided by looking at the results following the 1994 ceasefire. 1995 was a record year for the Northern Ireland tourism industry. Total visits to the Region increased by 20%, holiday visits rose by 67%.

Table 6: Total Visits to Northern Ireland by purpose of visit

	1992	1993	1994	1995	1996	1997
VFR	509,600	519,500	521,500	564,000	590,000	577,000
Holiday	247,200	251,000	275,000	461,000	297,000	263,000
Business	380,300	377,600	387,700	402,000	409,000	419,000
Other	117,400	113,800	109,200	130,000	140,000	156,000
Total	1,254,500	1,261,900	1,293,400	1,557,000	1,436,000	1,415,000

source NITB

The Northern Ireland Tourist Board estimates that a prolonged period of peace could result in over 1 million additional visitors per year coming to Northern Ireland by the year 2001, the contribution of tourism to GDP increasing to 5%, and tourist revenue rising to over £500m which would help sustain an extra 20,000 new jobs.

CHAPTER 6 : TRANSPORT

Roads Network

The roads network in Northern Ireland forms by far the most significant element of the Region's transport infrastructure. In terms of overall road provision, measured in terms of density per square kilometre, the Northern Ireland network compares favourably with other regions.

At the end of 1997/98 there was 24,470km of public road in Northern Ireland. Of these, unclassified roads accounted for the largest proportion (59%) followed by Class III (19%), Class II (12%) and Class I (9%). Motorways accounted for 0.5% of the total. A higher proportion of the Great Britain network is motorway (0.9%) and Class I (13%), with a lower proportion of unclassified roads (55%).

The proportion of Northern Ireland road network of motorway standard is also significantly below that of other European countries, where on average motorways account for 1.3% of the total road network.

The profile of the local roads network has developed in a manner consistent with the needs of a dispersed rural population. The topography of Northern Ireland has also been a relevant factor in determining the nature and scale of the present network. The road network in the region is 2.5 times more extensive per head of population compared to England and Wales - 23 kilometres per head compared to 9 kilometres per head.

98% of freight is transported by road in Northern Ireland, compared with 64% in Great Britain.

Table 7: Freight volumes on Northern Ireland roads 1993 to 1997

	1993	1994	1995	1996	1997
Volume of freight (million tonnes)	51.1	43.7	50.1	56.6	47.2

The total miles travelled on Northern Ireland roads by all vehicles has increased by an average of 2.5 to 3% per annum over recent years.

Private transport

During the past 25 years there has been a significant growth in private transport. In 1971 there were 299,300 licensed private cars in the Region. By 1995 this had increased by 74% to 521,600, equivalent to a growth of 2.2% per annum. Vehicle stock in Northern stands at around 684,000 (December 1997).

At 31 March 1997, 70% of households in Northern Ireland owned at least one car. The comparable estimate for households in Great Britain for 1996/97, taken from the General

Household Survey was also 70%. Cars per 1,000 population have increased by 43% in the United Kingdom and 46% in Northern Ireland between 1981 and 1997.

Since 1987, Northern Ireland has seen the greatest increase in the number of vehicles registered compared with the rest of the United Kingdom. However car ownership per head is lower than in Great Britain - 465 cars per 1000 population over 16 years old compared to 534 cars per 1000 in Great Britain.

There has been a marked growth in the use of cars for commuting to work. In 1971 slightly more than 38% of employed people drove to work in a car or van. This increased to 53.8% in 1981 and 65.6% in 1991. The Labour Force Survey estimates that 79% of the workforce in Northern Ireland now travel to work by car, van or minibus, 8% more than in the United Kingdom as a whole.

In addition people have been travelling further to work. In the 1981 to 1991 inter censal period there was a 9,700 (15%) increase in commuting into Belfast City Council area, and a 14,900 (40%) increase in commuting between Districts within the Belfast City Region.

While the number of Heavy Goods Vehicles (HGV's) has increased in recent years, they continue to form about 8.5% of all vehicles on the roads. With a trend towards the larger sizes of HGV's there was a 21% increase in the weight of goods lifted between 1988 and 1995.

Accessibility to the private car has been steadily increasing. In 1971 almost half of all households (46.4%) did not have a car. By 1981 this had declined to 40.1%, and by 1991 it had further declined to 35.5%. It is now estimated that 30% of households in the Region do not have a car.

Cars in Northern Ireland tend to be newer than those in Great Britain. The average age of private light goods vehicles in Northern Ireland at 31 December 1997 was 4.4 years compared with 7.4 in Great Britain.

Public Transport

In contrast with the rapid steady growth of private transport, the usage of public transport has markedly declined over the past 25 years from 172 million passenger journeys in 1990/91 to around 87 million passenger journeys in 1995/96. In terms of total journey miles, the use of buses has declined from about 19% to 6% and rail from 4% to 2%.

Ulsterbus passenger journeys decreased by 4% from 53.9 million during 1996/97 to 51.6 million during 1997/98. Citybus passenger journeys also fell by 5% from 24.3 million to 23.1 million over the same period. Within the Belfast area the number of bus journeys made by passengers in 1995-96 was 15% lower than in 1985-86 although the distance travelled each year by Citybus vehicles has remained more or less constant. During the same period the distance travelled by Ulsterbus vehicles rose by 45% while the number of passenger journeys was maintained at slightly below 1985-86 levels.

In 1997/98 Ulsterbus had 1,181 buses, and Citybus had a fleet of 266 buses.

The rail network in Northern Ireland is not extensive, with many parts of the Region having no rail service. The rail network consists of 336 kilometres of track with services to

Derry/Londonderry and Portrush in the North West,; Larne, Belfast and Bangor along the eastern seaboard; Newry in the south and onwards to Dublin in the Republic of Ireland.

There were 6.4 million rail passenger journeys in 1997. Rolling stock consists of 43 locomotives and 96 passenger coaches.

Northern Ireland has a lower proportion travelling to work by public transport than the rest of the United Kingdom. The proportion travelling to work by bus is 7% compared to 8%, and less than 1% by train compared with 3% in the United Kingdom.

During 1997, 13,000 tonnes of rail freight were carried from the Republic of Ireland to Northern Ireland, a 47% decrease on the 262,000 tonnes carried during 1994. The tonnage of freight carried from Northern Ireland to the Republic of Ireland during 1997 was 134,000, a 51% rise on the 89,000 carried in 1996.

Ports

Port facilities in Northern Ireland are sufficiently well developed to meet present and immediately foreseeable needs. Northern Ireland has four main sea ports which in order of importance are Belfast, Larne, Warrenpoint and Derry/Londonderry. Between them they handled 37% of tonnage through the ports on the island of Ireland.

Belfast is the busiest port on the island of Ireland, handling over 10 million tonnes of shipping in 1995. The port of Belfast has good links to Scotland and to ports in the north-west of England such as Heysham and Liverpool. The designation of Liverpool as a Channel Tunnel rail freight terminal with a quayside rail link facilitates access to the European rail network and rapid onward transit of goods to the Continent. Heysham and Liverpool also offer links to Great Britain's extensive motorway network and its main centres of population and manufacturing.

Larne is the second largest Northern Ireland port and has been extensively modernised in recent years. Larne specialises in Roll On/Roll Off but also handles bulk and general cargoes. The port of Warrenpoint was constructed in 1970 and has shipping services to Great Britain.

Derry/Londonderry's trade is primarily importing of bulk commodities. There has been an increase in the tonnage and range of goods following the relocation of the port from the City centre to Lisahally in 1993. This has enabled the handling of larger vessels and the development of warehousing.

Since 1990 the tonnage of inward freight to all Northern Ireland ports has increased by a fifth to around 14.2 million tonnes of cargo in 1997. Over the same period outward traffic has grown by 29% to over 5 million tonnes.

Airports

Over the period 1987-97, the number of passengers using commercial air transport in Northern Ireland rose by 58% from 2.4 million to 3.8 million. Domestic passenger flights accounted for 82% of total passenger flights in 1997.

Belfast International is the largest of the Region's three main commercial airports handling 49% of all commercial movements in 1997 and 2.46 million passengers in the same year. In terms of terminal passengers, Belfast International was the 11th busiest commercial airport in the United Kingdom and accounted for 1.7% of all United Kingdom passengers.

Since it opened in 1983 Belfast City airport has increased its passenger volumes fifteenfold to 1.28 million passengers in 1997 and was fourteenth busiest airport in the United Kingdom. Of the United Kingdoms 20 busiest airports, between 1992 and 1997, Belfast City had the third highest percentage change in the number of terminal passengers with an increase of 109%.

64,000 passengers used the City of Derry airport during 1995.

The most popular passenger route from Northern Ireland airports is to London Heathrow with 976 scheduled direct flights per week. Other destinations with a high frequency of scheduled flights include Manchester (87), London Stansted (57), Birmingham (52), Glasgow (52) and the east Midlands (30).

Cycling

In 1997, the first section of the National Cycle Network was opened on the cycle network between Craigavon Hospital and Oxford island on the shores of Lough Neagh. Several further sections have been completed, bringing the total length of Network now in place to 30 miles. These include a purpose built cycle track between Coleraine and Portstewart, a short length of unsegregated cycle track in Enniskillen, and a signed cycle route between Magilligan and Coleraine. Work has also begun on the first phase of a six mile cycle track from the University of Ulster at Jordanstown to Belfast.

In 1998 the Kingfisher Trail, which comprises some 130 miles of on-road signed cycle route and connects with the National Cycle Network, was completed.

Road Accidents

Since a peak in 1988, the number of deaths due to road transport accidents has fallen from 235 to 146 in 1998. Compared to other United Kingdom regions, Northern Ireland has consistently shown the highest road accident death rate, and the highest rate of road traffic casualties (over 12,000 people injured).

CHAPTER 7 : EDUCATION AND SKILLS

School provision

For a small region, in population and area, Northern Ireland has a well developed network of schools and colleges, though the structure of education, curriculum and teacher requirements are broadly similar to the rest of the United Kingdom.

Around 40% of primary pupils (twice the UK proportion) attend schools with less than 100 children - reflecting the variety of provision and the continuing importance of small rural schools.

School provision includes distinct types of school at primary and secondary levels - controlled and maintained which broadly equate to Protestant and Catholic community background. There are also a small number of integrated and independent schools.

There is widespread selective streaming at age 11 into grammar and secondary schools.

Table 8: Northern Ireland Education Provision

Type	Schools / Colleges	Pupils
Primary	1,320	80,000
Grammar	70	46,000
Secondary	160	83,000
Further Education	17	80,000

Figs. are rounded - source DeNI strategic plan

‘Home to school’ transport

Those who attend a school or college outside the statutory walking distances are generally entitled to free transport. Some 116,000 pupils receive transport assistance. Of these 70,000 (60%) use public transport, 33,000 (28%) travel on Education and Library Board vehicles and the remainder travel by other means including contract hire and taxis.

Further and Higher Education

Further education (FE) is available in most main towns across Northern Ireland, either in one of the 17 colleges’ main campuses or in an outreach centre. FE caters for a wide range of the population from school age pupils to those beyond retirement age, though most are in the under 19 age group.

Participation in Higher Education has almost doubled in the last decade, fuelled by the rising level of qualifications being achieved by school and college leavers and by mature entrants seeking to improve their knowledge and skills.

In comparison with the rest of the UK, Northern Ireland has fewer Higher Education places relative to its share of young people. Around 40% of full-time undergraduates attend institutions outside Northern Ireland, and research suggests that the majority do not return.

There are around 59,000 students from Northern Ireland on Higher Education courses in the United Kingdom mainland and the Republic of Ireland.

Queen’s University Belfast has 8,000 undergraduate and 1,500 postgraduate student; the figures for Ulster University are 10,000 and 800 respectively.

Higher education provision is focused in and around Belfast and in Derry/Londonderry and Coleraine. University outreach facilities, in partnership with local authorities at Armagh and Enniskillen enhance provision and fulfil an important role in promoting better access to Higher Education in the South West of the Region. In addition Further Education colleges offer some full-time and part-time higher level courses.

The Springvale Campus being developed by Ulster University and the Belfast Institute of Further and Higher Education will spearhead urban social and economic regeneration in North and West Belfast. The campus will include a Community Outreach Centre, an Applied Research Centre and specialist training facilities.

There are Agricultural Colleges at Antrim, Cookstown and Enniskillen; and The Rural College at Draperstown. They provide specialist training and development support for Northern Ireland’s farming and rural development industry. The Hotel and Catering College is located at Portrush.

An increasingly well educated and skilled population

Northern Ireland’s youth is increasingly well educated and qualified. In 1986, 60% of 16 year olds attended school or Further Education both full and part time, the lowest rate in the United Kingdom. However by 1994 the participation rate had increased to the UK average of 79%.

The proportion of school leavers continuing in full time education has risen from 52% in 1990 to 61% in 1995.

Table 9: % School leavers continuing in education

Destination	1989/90	1990/91	1991/2	1992/3	1993/4	1994/5
Higher Education Institutions	21.1	22	23.9	25.9	26	26
Further Education Institutions	30.9	33.4	34.2	36.4	36.3	35
Total Continuing in Education	52	55.4	58.1	62.3	62.3	61

Source DeNI / (see Social Brief Table 7.8)

Examination results rank among the best in the UK, particularly at A-level and NVQ level 2. The proportion of school leavers achieving two or more A levels or equivalent in 1996/7 was 32.5% - the highest in the UK. 54.3% achieved five or more GCSEs at grades A* - C or equivalent. The proportion leaving with no GCSEs was 6.2%, a fall from the 7.1% in 1992/3.

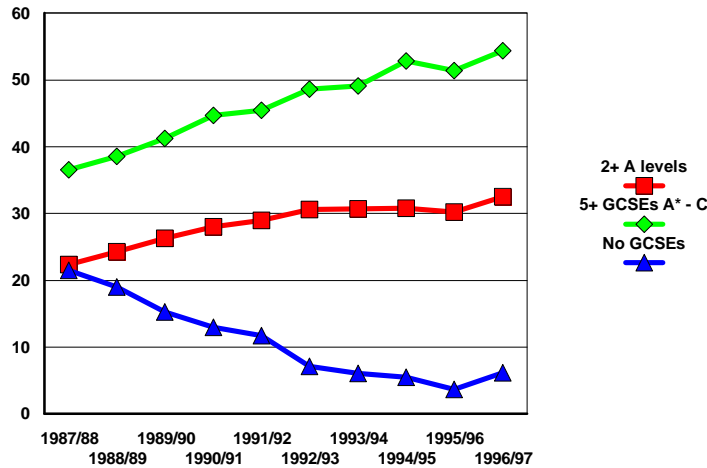


Diagram 12: Qualification of School Leavers 1987/88-1996/98

National Targets for Education and Training, set in 1995, represent the skill levels that the United Kingdom needs to attain by the year 2000 in order to remain competitive with our leading economic competitors. There has been steady progress to date towards meeting the targets in Northern Ireland.

Underachievement

While the percentage of pupils leaving school with no GCSE/GCE qualifications has fallen, almost 1 in 5 of the workforce has no formal qualification, and the situation is worse for the unemployed (1 in 3 without qualification). Underachievement in education is closely linked to social disadvantage, and education initiatives therefore feature prominently in Targeting Social Need programmes.

Studies have found that a large number of young people are not benefiting from formal education provision nor are they availing of the various training measures in place aimed at easing the transition from school to work. It is estimated that 1,000 to 1,400 (6%) of all 16 year olds fall into this category, a much lower rate than in the United Kingdom. Higher rates are found in the urban areas of Belfast and Londonderry and in a number of the more rural areas in the west of the Region.

CHAPTER : 8 ENVIRONMENT

Biodiversity and Habitats

Grasslands

Agriculturally improved grassland, which includes most farmland in Northern Ireland, is by far the commonest habitat, occupying some 782,000 hectares or 55% of the Region. It is managed with the aim of maintaining a high level of production and is generally of low conservation value. As farming becomes more specialised and intensive - (e.g. by increasing stock densities and selective breeding; by replacing hay with silage; by draining, ploughing and re-seeding rough grazing) - biodiversity is reduced. By contrast, grasslands that are not subject to intensive management e.g. hay meadows and pastures or calcareous grasslands - such as those found in West Fermanagh and the Erne Lakelands - have a high conservation value but are scarce.

With the reduction in mixed farming, arable cropping has fallen, and now accounts for only 4.5% of the land area.

There are 210,000 kms. of hedgerows, stone walls and ditches in Northern Ireland making up 40% of the UK total.

Woodland

Less than 6% of Northern Ireland is forested - one of the least afforested areas of Europe, where the average is 21% coverage. Plantations of non-native conifers make up 75% of the tree cover but this type of woodland is generally considered species poor and of limited conservation value. Many post-war afforestation schemes reduced biodiversity e.g. when blanket bogs were planted.

Broad leaf and mixed forests are estimated to cover about 43,800 hectares, often in small stands and scattered throughout Northern Ireland. Bluebells, primroses, fungi, birds, red squirrels, foxes and hedgehogs are typically associated with this category of woodland.

Heath

Characterised by heather species there are some 20,000 hectares of upland heath and 4,700 hectares of lowland heath remaining in Northern Ireland; the latter being of considerable conservation importance, comprising 8% of the UK total. The dry heath of the Mourne is the major upland location in Northern Ireland and one of the best sites in the UK.

Wetlands

Northern Ireland is rich in freshwater habitats - there are 1,600 lakes (over 0.25 ha) and some 19,000 kms. of rivers and streams.

Lakes are particularly important occupying 62,500 hectares which is 21% of the UK total, and often support important reedbeds and carr woodland.

Fens are peatlands which, unlike bogs, are not solely reliant on rainwater. They are found throughout the Region, with high concentrations around Upper Lough Erne, the southern shores of Lough Neagh and in the drumlin belt of south Armagh and south-central Down.

Bogs (raised and blanket) have high conservation value and priority, being one of Europe's rarest and most threatened habitats. The raised bogs typically form in lowland basins e.g. the drumlin country of Fermanagh, Armagh and Down, while the blanket bog is the main vegetation type of many upland areas, where it is mixed with heaths and lakes.

Coastal and marine

Northern Ireland's 650 kms of coastline has an exceptional variety of habitat and landform. Less than half is open sea coast. Key sites include the cliffs at Rathlin and the Causeway Coast, and the sand dunes at Magilligan and Murlough (Dundrum Bay). Islands, because of their relative isolation, are especially important for breeding birds, and Rathlin off the north Antrim site is designated as an Area of Special Scientific Interest.

The Region has a number of major sea loughs - Foyle, Carlingford, Larne, Belfast and Strangford - which are of considerable importance for the whole of Europe, in terms of wintering waders, ducks and geese, and, in the case of Larne, Strangford and Carlingford, for colonies of breeding terns.

Urban areas

Urban areas are the most modified, familiar and accessible habitat. They are generally thought of in terms of town parks and formal gardens, but also contribute to biodiversity in domestic gardens, derelict land and overgrown spaces.

In Belfast, the City Council manages 50 parks and playing fields and biodiversity is being increased especially in the larger parks such as the Barnett Demesne and Cavehill Country Park. 'Nature in the City' identified 638 open space sites within the Belfast Urban Area.

Land requirements for future housing and industry will entail the use of 'greenfield and brownfield' sites, posing possible threats to biodiversity in each case. However, current planning regulations mean that major housing schemes are unlikely to result in a direct loss of valuable habitats.

Urban expansion is mainly associated with pressure on the urban fringe areas but often housing demands are met by the development of single dwellings in the countryside. Along with demand from the rural communities this can pose threats to biodiversity not just directly by land take and site disturbance; but indirectly and cumulatively e.g. by generating more travel and adding to the amount of sewage effluent discharged to streams.

Biodiversity and Species

Key species of particular significance in Northern Ireland include the marsh fritillary butterfly, otter, pollan and white clawed crayfish.

Many species are known to have become extinct in Northern Ireland, and others are suspected of being extinct. Even though our knowledge needs to be expanded for many species, 1250 species of conservation concern have already been identified. Some 400 have been categorised as being of highest concern and identified for the preparation of species specific, costed action plans. To date 172 action plans have been published.

Species known to have become extinct in Northern Ireland since the 1960's include the golden eagle, corn bunting and grey partridge, with changes in agricultural practices being suspected for these losses.

Environmental designations

In accordance with its commitments under European and National Legislation, such as the Habitats Directive 1992 and the Nature Conservation and Amenity Lands (NI) Order 1985, Government has made considerable progress in identifying and formally recognising environmental features of importance. In order to protect unique and important habitats and landscapes, the Department of the Environment (NI) has designated identified areas for protection and conservation. The list of designations set out below represents a significant achievement and a sound basis for future conservation and management actions.

- 146 Areas of Special Scientific Interest
- 1 World Heritage Site (Giant's Causeway)
- 47 National Nature Reserve
- 1 Marine Nature Reserve
- 7 Ramsar sites
- 10 Special Protection Areas (for birds)
- 20 candidate sites for Special Areas of Conservation status.
- 5 Environmentally Sensitive Areas
- 5 Areas of Special Archaeological Interest
- 9 Areas of Outstanding Natural Beauty covering 20% of the Region and 70% of the coast.

Built Heritage

The landscapes of Northern Ireland bear the imprint of human occupation over thousands of years. The Region has a rich, diverse and distinctive inheritance which includes individual sites, structures and buildings or groups of buildings spanning many historical periods and cultural influences.

there are 1,230 historic monuments scheduled for protection, 182 of which are in state care.;

over 14,500 archaeological sites and monuments have been identified in Northern Ireland; 8,579 buildings had been listed by March 1997 for preservation for their architectural or historic significance; and

Fifty-three Conservation Areas have been designated to protect the best townscapes throughout the Region.

In addition there remains an important yet diminishing number of vernacular buildings throughout the Region. A recent sample survey in Northern Ireland indicated that of the vernacular buildings which existed in 1909, 49% had gone without trace; 39% had been altered, and were often no longer recognisable as vernacular; and only 12% have survived intact.

Air quality

Outside the major urban areas the quality of the Region's air is generally good.

In Belfast smoke and sulphur dioxide levels have been reduced and air quality improved considerably since the 1970s, following the introduction of the Belfast Smoke Control Programme. Sulphur dioxide emissions have been reduced from 81,000 tonnes in 1980 to 58,000 tonnes in 1997.

However there are rising levels of PM₁₀ (microscopic solid particles arising from combustion sources - particularly diesel vehicles), ground level ozone and oxides of nitrogen. In Belfast target levels of PM10 were exceeded on 134 days in 1996.

Water quality

River quality has been monitored in Northern Ireland since the early 1970s and 2400 kms of water courses are presently monitored at almost 300 stations. In 1995 the biological quality of 99% of the Region's rivers ranged from very good to fair; and the chemical quality of 88% of rivers ranged from very good to fair; and

Northern Ireland's 16 identified bathing waters complied fully with the EC Bathing Waters Directive in 1996, achieving Blue Flag status.

Waste

Around one million tonnes of municipal solid, commercial and wastes were disposed of in Northern Ireland in 1997/98. The vast majority of this (96.6%) was disposed of to landfill sites.

There are 79 sites registered with Customs & Excise for landfill disposal - of these 20 are currently accepting municipal wastes.

The amount of recycling in the Region remains low, under 5%. An extensive network of bottle banks and facilities for the collection of cans is developing.

CHAPTER 9: SOCIAL TRENDS

Life Expectancy

The health and wellbeing of the people of Northern Ireland has improved steadily throughout this century. Over recent years there has been a small but steady increase in life expectancy for both men and women.

The average expectation of life at birth in 1900 was 47.1 years for men and 46.7 for women. At birth, Northern Ireland males can now expect to live for 72.9 years and women for 78.4. However life expectancy in Northern Ireland is less than the European Union average.

The infant mortality rate has always been recognised as a good indicator of the health of the population. Between 1991 and 1995 it fell from 13.2 to 7.1 per 1,000 live births. The infant mortality in Northern Ireland remains the highest in the United Kingdom.

Coronary heart disease remains the major cause of early deaths, accounting for 25% of all deaths in 1996. Despite recent improvements, Northern Ireland has still one of the highest rates of early death from the disease among European Union countries. The death rate from heart disease in the Region is 94 above the European Union rate for men and 173% for women. In a United Kingdom context, Northern Ireland's rates are 22% higher for men and 43% higher for women than the United Kingdom average.

Many of the conditions which led to premature death or long-term illness such as coronary heart disease, cancers and accidents are preventable. Similarly, many of the causes of social problems are also preventable. Nearly two-thirds of all premature deaths in adults in Northern Ireland are due to heart disease and cancers. Risk factors common to the major diseases are smoking, lack of physical activity and poor nutrition. The level of these risk factors is high in the Northern Ireland population, for example, two-thirds of the population aged 15-64 have two or more risk factors for heart disease.

Physical Activity

Physical exercise is an important factor in health and well-being. Physical inactivity is an independent and important risk factor for coronary heart disease.

Increasing use of the car means we walk and cycle less than we used to. The Health and Activity Survey 1992 highlighted that 70% of males and 80% of females do not take sufficient exercise to protect or improve their health.

Regional Inequalities in health and social well-being

Good health and well-being are not evenly distributed across the population. People excluded from full participation in the life of the community for various reasons including poverty, illness, disability and low educational achievement, suffer more ill health and poor social well-being.

Children born into families whose head is in the skilled, partly skilled or unskilled social class groups have a 20% higher mortality rate in the first year of life than those whose head is in either the professional or managerial groups.

Among men of working age, mortality is three times greater for those in the unskilled group than in the professional groups.

People living in some areas of the Region have levels of long-term sickness or chronic illness three or more times greater than people living in other areas.

Life expectancy at birth is five years greater for women and men.

Social security

In Northern Ireland the proportion of people receiving most social security benefits is much higher than in Great Britain.

The proportions of people receiving attendance allowance and disability living allowance in Northern Ireland are more than two times higher than in Great Britain.

Almost 43% of households in Northern Ireland receive child benefit compared to 32% in Great Britain.

Almost one person in five over the age of 18 receives income support in Northern Ireland compared with one in eight in Great Britain.

Targeting Social Need (TSN)

The Government continues to attach a high priority to the Targeting Social Need (TSN) Initiative. Economic and social deprivation exists on both sides of the Northern Ireland community. However, on all major social and economic indicators, Catholics in Northern Ireland generally experience greater levels of disadvantage than Protestants.

Defining social need

The skewing of resources to disadvantaged areas underlies the Targeting Social Need initiative, which has been a public expenditure priority since 1991. At District Council level deprivation is predominantly concentrated in Belfast and in the peripheral areas of the west, south and north-east of the Region.

Sport, recreation and culture

Sport, both the recreational and competitive, makes a positive contribution to Northern Ireland by providing a strong sense of local, regional and national pride; personal development and enjoyment; and tangible economic, community and health benefits. There is a wealth of indoor and outdoor facilities and amenities; well established organisational structures and a range of providers. Northern Ireland has the highest level of indoor sporting provision per head of population in Europe.

There is a high level of participation in recreational and competitive sport, particularly among the young. Generally there is also a great reserve of public goodwill towards sport at all levels and strong aspirations for success at the top levels of competition. Against this, formal participation as reflected in club membership has decreased, in turn weakening the funding base and placing greater pressures on the committed volunteers who hold sport together.

Cultural activities (which include performed arts, museums and galleries, heritage and the cultural industries, e.g., film, video and design) are estimated to directly sustain over 5000 jobs in Northern Ireland. Museums and performed act events attract a large number of visits, more for example than the heritage sector.

There is an extensive network of local museums across the Region. The Ulster Museum, Ulster Folk and Transport Museum and the Ulster-American Folk Park are major facilities of regional significance. Construction of the Odyssey Project on Belfast's Waterfront as a regional centre of culture, learning and recreation will enhance the range of cultural amenities.

CHAPTER 10 : INFRASTRUCTURE

Water

In the past decade there has been a 7% increase in demand for water. By 1995, around 250 million cubic metres of water were consumed annually, equivalent to lowering Lough Neagh by 60 cms. 710 million megalitres of water are supplied daily to over 650,000 homes, farms and businesses.

Water infrastructure consists of 22,220 km of watermains. There are 103 water treatment works (47 major); 403 service reservoirs, and 51 impounding reservoirs.

98% of the Northern Ireland population is connected to piped water supply. The rural dimension of the Region is evident in the average length of watermain required to serve the population - 13.7 metres of watermain per head of population in Northern Ireland, compared to 6.2 metres in England and Wales (resulting in comparatively higher operating and capital investment costs when expressed as unit costs per head of population).

Sewerage

83% of the population in NI is served by the public sewerage system, which treats 655 million megalitres of sewage daily. There are 10,000 km of sewers, 922 sewage treatment works and 918 waste water treatment works.

The average number of people served by a sewage treatment works is 5 times higher in England and Wales than in Northern Ireland - a reflection of the relatively low population density in the region. Costs per head of population are higher.

Energy

Northern Ireland is almost totally dependent on fossil fuels for power - 48% of the Region's electricity generation is dependent on natural gas, 48% dependent on coal, 7% on oil and 1% on renewables.

Northern Ireland has the highest costs of domestic electricity in the UK: the charge per unit for domestic customers on standard tariffs is 21.2% higher than the average for England and Wales.

Table 10: UK Domestic tariffs 1996/97

	Cost per unit (pence)	Standing charge per Quarter (£)	Total charge per unit (pence)
NIE	8.45	15.2	10.26
UK average	7.37	10.15	8.6
ESB	7.3	5.46	7.96

source Director General of Electricity Supply for Northern Ireland Annual Report 1996

Electricity is provided by 4 power stations; Ballylumford accounting for 48% of the generating capacity, Kilroot and Belfast accounting for 36% and Coolkeeragh 16%.

Table 11: Electricity Generating Capacity

Station	Capacity	Market share
Ballylumford	1067MW	48%
Kilroot	578MW	36%
Belfast West	240MW	
Coolkeeragh	358MW	16%

source: OFFER NI Director General of Gas for NI Annual Report 1996

In spring 1995 the Tandragee - Louth interconnector between NIE and ESB in the Republic of Ireland was recommissioned providing benefits in terms of diversification of power sources. An electricity interconnector between Scotland and the Region is also planned.

There has been a gradual introduction of electricity from renewable sources with the adoption of the Non Fossil Fuel Obligation (NFFO) orders. In 1997 renewable energy sources contributed only 1.4% of the Region's generation needs..

Combined Heat and Power (CHP) is much less developed in Northern Ireland than in the rest of the United Kingdom and Europe, with just 7 modern working CHP schemes in 1995 - four are in sewage works, one at Enniskillen Agriculture College, one at Thompsons Animal Feed Mill in Belfast and one at Du Pont Chemical works in Londonderry. The total installed capacity of these schemes is 14 MWe.

The natural gas pipeline linking the Region and Scotland has recently been completed and Ballylumford - the Regions main power station - completed its conversion to gas in April 1997. A feasibility study into a North/South gas pipeline is also underway.

In 1996, Phoenix Natural Gas Ltd and Premier Transco were granted the first licenses to develop a natural gas network in the Region.

Over the next ten years or so the network will be extended to cover Belfast, Bangor, Newtownards going as far as Donaghadee in the east and Carrickfergus and Larne in the north. Within the licensed areas there are some 25,000 potential customers in the industrial, commercial and domestic sectors. Over 500 million pounds of investment is planned by Phoenix Natural Gas Ltd.

Phoenix Natural Gas estimate that gas will be made available to 75,000 properties by the year 2000 and 200,000 properties by 2008

Telecommunications

Northern Ireland can boast one of the most modern and sophisticated telecommunications networks in Europe. The Region was selected by the European Commission as a trial area for the installation of state of the art telecommunications equipment, resulting in a £100 million investment in the STAR (Special Telecommunications Action for Regional Development) programme installed by British Telecom.

The STAR system comprises a digital optical fibre network incorporating 44 towns across Northern Ireland and including well over 90% of its business connections; a fibre connection

to mainland Britain linking into the major European and worldwide advanced networks; and a hi-tech link to the Republic of Ireland.

The development of the Integrated Services Digital Network (ISDN) which provides the ability to deliver two simultaneous connections in any combination of data, voice, video and fax over a single line, can now reach over 90% of dwellings in Northern Ireland.

American communications company NFL is investing £600 million through its CableTel subsidiary to provide Northern Ireland with a highly advanced telecommunications system.

NTL is investing a further £30 million connecting its Northern Ireland network to the rest of the United Kingdom and the Republic of Ireland which will provide for the first time an alternative to using British Telecom or Telecom Eireann for carrying telephone traffic between the United Kingdom and the Republic of Ireland.

Land drainage / River management

The need for agricultural improvement has been a major force in river management, involving field drainage, ditching and arterial drainage schemes. River management has also been important for transport, water and power supply, and for recreation.

In Northern Ireland the first major drainage scheme this century was carried out on the Lower Bann (involving the lowering of levels in Lough Neagh). By 1997 drainage improvements had been carried out on 1250 Km of the Region's major river systems.

Land drainage policies have now shifted their focus from agricultural improvement to a broader river management perspective.

INFORMATION SOURCES

The annual reports and Census reports from the Registrar General provide comprehensive information on the demography of the Region. The Northern Ireland Annual Abstract of Statistics, Focus on Northern Ireland and the Northern Ireland Social Brief are published by Northern Ireland Statistics and Research Agency and cover a range of social and economic topics.

Information on the Region is also provided in the reports, strategies and corporate plans of Government Departments, agencies and non-Departmental Public bodies. These can be obtained directly from the organisation but many are now available on the internet, in particular the Northern Ireland Public Service Web found at <http://nics.gov.uk/index.htm>.