



Draft Equality Impact Assessment (EQIA) on Invest Northern Ireland's Corporate Plan 2008 - 2011

January 2008

Section 75 of the Northern Ireland Act 1998

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PREFACE

This draft Equality Impact Assessment (EQIA) has been prepared to meet our statutory duties within Section 75 of the Northern Ireland Act 1998, to examine each policy where screening has indicated that there may be significant implications for one or more of the nine Section 75 grounds.

This draft report is available as part of the EQIA formal consultation stage on Invest NI's Draft Corporate Plan 2008 - 2011 and consolidates earlier EQIAs in relation to all programmes and schemes operating under the Accelerating Entrepreneurship Strategy (AES) and Business Development Solutions (BDS) together with the Recruitment and Selection EQIA.

We would welcome any comments that you may have in terms of this EQIA, including our preliminary recommendations with regard to measures to mitigate adverse impact and alternative policies.

Further copies of this EQIA report are available on Invest NI's website at www.investni.com/equality

If you require this brochure in an alternative format (including Braille, disk, audio cassette or in minority languages to meet the needs of those whose first language is not English) then please contact:

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Deadline for comments will be: **29 April 2008**

Following consultation the Final Report will be made available.

INTRODUCING INVEST NORTHERN IRELAND

Invest Northern Ireland (Invest NI) was established as a corporate body under the Industrial Development Act 2002, to work in partnership with the Department of Enterprise, Trade and Investment (DETI), in order to stimulate and encourage economic development in Northern Ireland.

Invest NI undertakes the activities previously delivered by the Industrial Development Board (IDB), the Local Enterprise Development Unit (LEDU), the Industrial Research and Technology Unit (IRTU), the Business Support Division of the Department of Enterprise Trade and Investment and the business support functions of the Northern Ireland Tourist Board¹.

Our Northern Ireland headquarters is located at:

- Bedford Square, Bedford Street,
Belfast BT2 7ES

We also operate through five regional offices:

- North East:
Clarence House, 86 Mill Street,
Ballymena BT43 5AF.
- North West:
 - 5th Floor, Timber Quay,
100-114 Strand Road, Derry BT48 7NR;
 - The Science Innovation Centre,
Cromore Road, Coleraine BT52 1ST

- South:
 - Drumalane Mill, The Quays, Newry BT35 8QF;
 - Oracle Conference Centre,
Upper Bann Institute, 36 Lurgan Road,
Portadown BT63 5BL
- West:
 - Kevlin Buildings, 47 Kevlin Avenue,
Omagh BT78 1ER;
 - INTEC Centre, 36 East Bridge Street,
Enniskillen BT74 7BT
- East:
Bedford Square, Bedford Street,
Belfast BT2 7ES

And a number of international offices which are based around five international centres:

- Europe
London, Dublin, Brussels, Dusseldorf
- North America
Boston, Denver, New York, San Jose
- Asia/Pacific
Tokyo, Taipei, Shanghai
- Middle East
Dubai
- South Asia
Mumbai

¹ Further details of founding legislation, roles, powers and responsibilities can be found in Invest NI's Management Statement and Financial Memorandum, issued by DETI (April, 2002) and available on request from the Equality Unit.

INVEST NI and SECTION 75

Section 75 (1) of the Northern Ireland Act 1998 requires that Invest NI shall, “in carrying out its function relating to Northern Ireland, have due regard to the need to promote equality of opportunity” between the following nine Section 75 grounds:

- Persons of different religious belief, political opinion, racial group, age, marital status or sexual orientation;
- Men and women generally;
- Persons with a disability and persons without; and
- Persons with dependents and persons without.

In addition and without prejudice to these obligations, in carrying out its functions, Invest NI are also committed to promote good relations between persons of different religious belief, political opinion or racial group.

Invest NI's Equality Scheme was approved by the Equality Commission for Northern Ireland on November 19th 2003. This scheme sets out how Invest NI proposes to fulfil the obligatory duties determined through Section 75 legislation and its implementation.

It also acknowledges the commitment to carrying out Equality Impact Assessments (EQIAs) policy reviews, and to develop new policies as required.

Invest NI has conducted Equality Screening Consultations to screen all policies, written and unwritten, to assess which policies may potentially impact on equality of opportunity and/or good relations obligations. Each policy was considered using the following criteria:

- (a) Is there any evidence of higher or lower participation or uptake of different groups?
- (b) Is there any evidence that different groups have different needs, experiences, issues and priorities in relation to the particular policy?
- (c) Have consultations with relevant groups, organisations or individuals indicated that particular policies create problems, which are specific to them?
- (d) Is there an opportunity to better promote equality of opportunity or better community relations by altering the policy or working with others in Government Departments / education or in the larger community?

Following this screening process, it was determined that the Draft Corporate Plan 2008 - 2011 should be subjected to Equality Impact Assessment. This report presents the draft findings of that assessment.

INVEST NI DRAFT CORPORATE PLAN 2008 - 2011

Invest NI's Draft Corporate Plan 2008 - 2011 is set in the context of a new political dispensation for Northern Ireland, a new draft Programme for Government (PfG) and renewed confidence across the region. In implementing this, our third Corporate Plan, Invest NI will help to steer an economy in transition. While the Northern Ireland economy has performed well in recent years, relative to the UK average, this performance masks a number of underlying structural weaknesses. These include:

- an underdeveloped private sector, which comprises mainly micro-firms and lacks scale;
- low productivity per head compared with the UK average;
- low innovation and R&D expenditure;
- low levels of business formation;
- the highest rate of economic inactivity in the UK;
- proportionately high long-term unemployment; and
- an overdependence on the public sector.

Northern Ireland Gross Value Added (GVA) per head relative to the UK average narrowed during the early to mid 1990s but, since 2000, the gap has remained at roughly 20 per cent.

Excluding the high-income regions in the Greater South East of England (GSE) reduces the gap to 10 per cent. Relative to the UK as a whole, Northern Ireland has a larger share of employees in the public sector, construction, manufacturing and agriculture and is under-represented in certain high-productivity sectors, such as business and financial services. As a result, Northern Ireland sits near the bottom of the twelve UK regions.

Manufacturing productivity has shown convergence with the UK and the sector has clearly benefited from government intervention in recent years. This trend is forecast to continue, albeit at a reduced rate. Removing the GSE also improves Northern Ireland's relative manufacturing productivity, although the change is marginal due to the small proportion of manufacturing industry in that region.

Draft Corporate Plan 2008 - 2011 Summary

Invest NI is a Non Departmental Public Body (NDPB) and is the main agency for delivering the Department of Enterprise, Trade and Investment's (DETI) economic development Public Service Agreements (PSAs). Specifically, these are;

PSA 1 - PRODUCTIVITY GROWTH
improve NI's manufacturing and private services productivity; and

PSA 3 - INCREASING EMPLOYMENT

increase employment levels and reduce economic inactivity by addressing the barriers to employment and providing careers advice at all levels.

Both PSAs are cross departmental and are held, jointly with the Department for Employment and Learning (DEL).

Accordingly, the aim of Invest NI's Draft Corporate Plan 2008 - 2011 is to

'increase business productivity, the means by which wealth can be created for the benefit of the whole community'.

With an average annual programme budget allocation of around £160million, Invest NI will allocate resources to ensure we achieve our delivery targets and ensure maximum impact. With this in mind, Invest NI will continue to operate eligibility criteria for support to existing and potential clients. These criteria are:

1. Total sales of over £100,000 per year
2. Sales outside NI greater than 25 per cent of turnover or £250,000 per year; and
3. Be capable of and willing to work with Invest NI.

For indigenous businesses that we actively target in the tradable-services sector, additional qualifying criteria are:

- knowledge-intensity, having the potential to sustain salaries above the Northern Ireland Private Sector Median; and/or
- a minimum gross margin of 20 per cent shown to be achievable.

In order to raise business productivity, Invest NI, through its third Draft Corporate Plan, will focus on three priority actions for economic growth:

1. Realising Client Potential - helping our clients become better at growing profitably.
2. Shifting the Sectoral Focus - this requires a shift in the sectoral mix towards higher value-added activities.
3. Frontier Technologies - the development of businesses at the leading edge of innovation and technology.

To help our clients to accomplish this, we will focus our resources on a number of potential actions, including:

- simplifying and increasing flexibility of our research, development and innovation programmes;
- increasing awareness of the benefits of innovation through role models and case studies;
- appointing a number of innovation advisers;
- introducing an Innovation Voucher Scheme;
- enhancing our design programme and doubling the target for participating companies;
- offering targeted development programmes aimed at enhancing management and leadership skills & improving productivity and business performance;
- increasing the relevance and quality of our mentoring and coaching support;
- increasing the number of strategic collaborative networks involving both business and knowledge institutions;

- working proactively with DEL to help tackle specific skills needs and to align qualifications with market demand;
- enhancing the role of technology missions in international markets to attract foreign direct investment (FDI) and seek to secure internationally mobile R&D projects;
- underpinning the sectoral shift by supporting the development of an R&D infrastructure and by skewing our support towards those projects which offer the most commercial promise from innovation;
- securing increased commercial outcomes from our research base;
- supporting industrial research within companies and in collaboration with knowledge institutions;
- introducing new industry-led competence centres; and
- ensuring a stream of risk capital for early-stage technology ventures to support indigenous and overseas-based entrepreneurs to locate in Northern Ireland.

The targets we will therefore use to measure our progress against our aim are as follows:

- increase sales outside Northern Ireland per employee of Invest NI manufacturing clients by an average of 6 per cent per annum;
- increase sales outside Northern Ireland per employee of Invest NI tradeable services clients by an average of 4 per cent per annum;
- increase by 3 percentage points sales outside the United Kingdom as a proportion of total sales by Invest NI client companies (excluding the top 25 exporting companies);
- secure total annual wages and salaries of £345 million from inward investment and locally owned clients. This represents an 8 per cent increase over the three-year period ended 2006/07;
- promote [6,500] new jobs from inward investment, of which
 - [5,500] will provide salaries above the Northern Ireland Private Sector Median
 - [2,750] will have salaries at least 25 per cent above the Northern Ireland Private Sector Median
- increase the business expenditure on R&D by Invest NI client companies with less than 250 employees by an average of 8 per cent per annum;
- increase the business expenditure on R&D by Invest NI client companies with 250 employees or above by an average of 5 per cent per annum;
- support 45 new start-ups selling outside the United Kingdom;
- support 300 start-up businesses selling to Great Britain;
- 75 per cent of land acquisition (acres) in areas of economic disadvantage; and
- [70 per cent] of new FDI projects secured to locate within 10 miles of an area of economic disadvantage.

CONSIDERATION OF AVAILABLE DATA AND RESEARCH

The Northern Ireland economy continues to present a unique profile within the UK and across the island of Ireland. In particular the dominance of the public sector is still noteworthy. The following data summarises key issues relating to the Northern Ireland labour market by Section 75 grounds.

Religious Belief / Political Opinion

In its 2006 report, 'Equality in NI: The Rhetoric and the Reality', the Committee on the Administration of Justice (CAJ) suggest that, 'The focus of the campaign to end political and religious discrimination at the point of recruitment has been, in large part, effective; it is obvious, however, that advances made regarding employment have not been translated into other social policy areas.' (CAJ, 2006)

This conclusion is supported in the main by the Equality Commission, highlighted in an earlier book by Osborne and Shuttleworth which argued that the fair employment legislation has been largely successful in removing religious discrimination in recruitment and selection (Osborne, R. & Shuttleworth, I. [2004]. Fair Employment in NI: A Generation On. Belfast: Blackstaff Press). By 2006, the composition of the monitored workforce had moved to 56 per cent Protestant, 44 per cent Catholic (excluding others; from 65 per cent / 35 per cent in 1990) (ECNI Monitoring Report No. 17), figures that are largely in line with those available for employment.

However, according to a recent report by the Equality Commission (October 2007), there are still community differentials 'in specific sectors, locations and occupations' that require closer examination (Statement on Key Inequalities in Northern Ireland, October 2007).

Across Northern Ireland, there are large regional differences in the Job Density Index (JDI; the total number of jobs in area divided by the resident working age population). Belfast is the only area with an index higher than 1 (1.38), while areas close to Belfast (e.g. Carrickfergus 0.4) often have much lower indices. However this may not be indicative of local employment opportunities but of opportunities of commuting to Belfast. (DEL Labour Market Bulletin 20, Dec 2006, p.26).

Of Parliamentary constituencies, East Antrim (.48) and North Down (.5) have the lowest JDIs while no area west of the Bann has a JDI lower than .63.

Regarding unemployment, the DTZ Pineda Consulting study for OFMDFM (2005) found that the overall unemployment rate in Northern Ireland was now among the lowest in Europe and was broadly in line with the rest of the UK.

In terms of Jobseeker Claimants in March 2004, the highest ward claimant count rates were in Derry, Strabane and North / West Belfast. Here between 13 per cent and 19 per cent of men of working age were claimants, in comparison with around 3 per cent for Northern Ireland as a whole.

CAJ has raised concerns that inward investment, 'appears to be contributing to increasing inequality in Northern Ireland - by replicating the pattern of general spending which sees those areas in most need receiving least by way of government intervention.' (p.148).

These claims would be vigorously contested by Invest NI which has produced two EQIAs on their programmes and schemes operating under the Accelerating Entrepreneurship Strategy (AES) and Business Development Solutions (BDS). These EQIA indicate that the distribution of resources across Northern Ireland is fair and is proportionate. To quote from the recent (July 2007) BDS EQIA (p.25),

"While there have been considerable shifts in support by region over time, no single demographic index such as population, size or community background can explain these findings. In the absence of contrary indicators it can be assumed that the levels of support that are applied (through offers) and gained (through assistance) must reflect a complex interplay between numerous social, economic and demographic factors, but that Section 75 considerations, including community background, do not appear to play a significant role."

At the same time, the EQIA reveal that there has been a trend towards providing greater assistance to the Belfast area per head of population. However, this trend is seen to reflect proportionately on the higher number of companies eligible for support in this area (BDS EQIA, p.24).

Prior to the implementation of its Client Monitoring Strategy 2008, Invest NI has already carried out preliminary analyses of the workforce of client companies with reference to data included in the annual monitoring reports produced by the Equality Commission. Data for the year 2005² was matched to 409³ Invest NI client companies. This sample represents approximately one fifth of the Invest NI client portfolio but constitutes over 70 per cent of Invest NI client company employment (88,087). In turn, this represents 37 per cent of employment covered by monitoring information received by the Equality Commission.

An important constraint on the interpretation of this information is that Equality Commission data are based on the location of the business HQ. Hence where there is a business with a HQ in Belfast and locations across Northern Ireland, all employment monitoring data will be attached to Belfast. In addition, the Equality Commission data includes the total employment of the business whereas in some cases the Invest NI employment relates only to that part of the business which has been assisted. An example of this would be a bank which has been assisted by Invest NI to establish a contact centre operation. A further consideration is the greater proportion of non-disclosed responses within the Invest NI group (7 per cent), compared with the full Equality Commission group (6 per cent).

Notwithstanding these issues, a comparative analysis reveals a slightly lower proportion of Catholic employees within the Invest NI client group (38 per cent) compared to the overall

2 Data extracted from a survey of Northern Ireland private sector businesses with employment of 26 or more, carried out by the Equality Commission for the year 2005. The data relates to full-time employees.

3 The Equality Commission provided Invest NI with a list of 2,435 businesses. There were disclosed religious breakdowns for 1,572, of which 409 were Invest NI Client Companies. 863 companies were without disclosed religious breakdowns because they employ less than 10 Catholics and / or Protestants, of which 191 were Invest NI Clients. In addition 140 of the 1,572 sample had HQ addresses listed in GB and could not be included in our analysis.

business base for which complete employment monitoring data was available (40 per cent). An analysis by Invest NI Regional Office Area is presented in Appendix 2(a).

In Appendix 2(b) a comparison of areas to the East and West of Northern Ireland shows that Invest NI clients in the East employ a slightly greater proportion of Protestants (60 per cent) compared to the wider business base within the Equality Commission sample (56 per cent) while Invest NI clients in the West employ a slightly higher proportion of Catholics (55 per cent) compared to the Equality Commission results (53 per cent).

While these figures may be indicative of general trends they may not be an accurate representation of the profile of Invest NI's client companies. For this reason, Invest NI is currently developing a more sophisticated and robust client monitoring strategy that will be operational by Spring 2008.

Gender

The labour market continues to be segregated by gender, in Northern Ireland as elsewhere. For example, the part-time workforce is predominantly female (72.5 per cent). Only 10 per cent of males that are in employment work part-time in comparison with 24 per cent of females. What is more, the part-time workforce has increased by 18 per cent since 2001 and by 7.2 per cent during 2005, to 88,000 (of 517,720).

Vertically, there are notable differences in the distribution of male and female employees across broad sectors of the economy. According to DEL's most recent Labour Market Bulletin,

'whilst some 65.4 per cent of male employee jobs are in the service sector, males are still well represented in Manufacturing (19.7 per cent) and Construction (10.3 per cent). Female employee jobs however are more concentrated in the Service sector (93.0 per cent), with only 5.3 per cent involved in Manufacturing and 1.1 per cent in Construction.' (Labour Market Bulletin 20, December 2006),

Horizontally, the labour market also continues to be stratified by gender. According to the Equality Commission, 'While labour market outcomes by gender have shown improvement over time, scope still remains both in terms of improving the accessibility of employment and of ensuring progression within employment, into a wider range of occupations and grades.' (Statement on Key Inequalities in Northern Ireland, October 2007).

One of the most striking gender differences is the persistent gap between men's and women's earnings, reflecting a host of inter-related social and economic issues (including work-life balance, availability of flexible working, subject choice at school, promotion and progression in work, childcare provision, pay systems and sectoral low pay). According to the Equality Commission's 2007 'Statement on Key Inequalities in Northern Ireland', 'Although the hourly pay gap between men and women continues to narrow, in April 2006, females working full-time had median annual earnings of £19,607, over 11 per cent less than the equivalent male figure of £21,849.' (p.11). While the gender gap in Northern Ireland is significant, it is narrower than that noted in the rest of the UK, primarily because of the historical over-representation of public sector jobs in the Northern Ireland labour market.

Marital Status / Dependency

Affordable, quality childcare remains problematic in Northern Ireland, with formal provision still very low in comparison with the rest of the UK. For example, in 2006 there were 92.5 day nursery places per 1000 children in Northern Ireland compared with 195.5 for England.

Furthermore, as the population continues to age so there is a growing need to recognise caring responsibilities for elderly relatives among employees.

Among a number of family-friendly initiatives, Invest NI has introduced a childcare voucher scheme for staff, and is looking at a strategy for developing awareness of voucher schemes among our clients through client executives, given relatively low levels of awareness within the private sector and especially in Small to Medium Sized Enterprises.

Race / Ethnic Origin

The ethnic breakdown of Northern Ireland has changed dramatically over recent years with a large increase in the numbers of migrant workers from other EC countries. It is not easy to estimate accurately the size of minority ethnic communities in Northern Ireland although it is widely acknowledged that the latest census figures (2001; Table 1) do not provide a reliable estimate (especially as EC residents are not classified as 'minority ethnic' for census purposes). For example, the Chinese Welfare Association has argued that the Chinese community was around double that represented in the census (4,100 v 8,000).

Table 1: Residents by Ethnic Group as % of NI Population

Ethnic Group	% NI residents
White	99.15
Irish Traveller	0.10
Mixed	0.20
Indian	0.09
Pakistani	0.04
Bangla-deshi	0.01
Other Asian	0.01
Black Caribbean	0.02
Black African	0.03
Other Black	0.02
Chinese	0.25
Other ethnic group	0.08

Source: 2001 Census

Broad estimates of the number of migrant workers can be drawn from several sources and including the Workers Registration Scheme (WRS) and National Insurance Allocations (see Tables 2 and 3 below):

Table 2: NI WRS Registrations by local authority of employment (May 2004 - March 2006)

LGD	WRS Count	Per 1,000 resident population
Northern Ireland	14,395	8

Source: Home Office: Immigration and Nationality Directorate May 2006

Table 3: NI National Insurance Number (NINO) Allocations Non-UK nationals allocated NINO's in Northern Ireland (April 2004 – March 20 05)

LGD	NINO Registrations	Per 1,000 resident population
Northern Ireland	5,568	3

Source: DSD

Housing and welfare provision among migrant workers is widely recognised as poor, with multi-occupancy dwellings often associated with poor living conditions. The Housing Executive HMO ('house in multiple occupation') database shows that as of August 2006 there were 11,028 houses in Northern Ireland formally identified as HMO's. A total of 219 HMO's have been identified as housing migrant workers.

According to the 2001 Census, Belfast South (2.63 per cent) was the only place where minority ethnic group members constituted more than 2 per cent of the resident population. In general the more significant ethnic populations tended to be in the urbanised parliamentary constituencies such as Foyle (0.92 per cent), Upper Bann (0.91 per cent) and North Down (0.87 per cent). The smaller ethnic minority populations, in percentage terms, were in the more rural constituencies such as South Down (0.49 per cent), Mid Ulster (0.63 per cent), North Antrim (0.56 per cent), West Tyrone (0.6 per cent) and Fermanagh and South Tyrone (0.59 per cent).

A minority ethnic group that consistently reveals itself in multiple indices of deprivation is the Irish travelling community. For example, 27 per cent of Irish travellers are unemployed compared to

7 per cent of other minority ethnic group members and less than 7 per cent of the total population. In total, 63 per cent of Irish travellers are economically inactive compared to 36 per cent of other minority ethnic group members and 30 per cent of the total population

The largest concentration of Irish Travellers is in Newry and Armagh (293) with other populations of over 150 in West Tyrone, Mid Ulster, Belfast West and Foyle.

Age

In 2001 the proportion of the population aged 50 or over was 29 per cent; it is predicted that the figure will rise to 35 per cent by 2021 and 44 per cent by 2041. According to the Equality Commission, 'negative assumptions about capacity' continue to create barriers at work for older workers.

Disability

According to the Labour Force Survey (April – June 2007), the employment rate for those with a disability remains low, at around 32 per cent, in comparison with 79 per cent for those without. Employment among those with mental ill-health or learning difficulties is especially low (estimated at around 1 in 5), and the Bamford Review of Mental Health and Learning Disability (2007) has set a Northern Ireland target of 50 per cent to be in full-time employment. Attitudes among employers, lack of qualifications and transport remain three key barriers to wider participation in the labour market among people with disabilities.

Sexual Orientation

Of various attitudinal and structural issues faced by those from the lesbian, gay and bisexual community in Northern Ireland, homophobic harassment at work features significantly, as revealed by a number of high profile tribunal cases along with recent research findings (Jarman, N. & Tennant, A. (2003). An Unacceptable Prejudice: Homophobic Violence and Harassment in Northern Ireland. Belfast: Institute of Conflict research).

Profiling Invest NI Staff

Looking within Invest NI itself by Section 75 grounds, breakdowns of Invest NI's 558 staff (as of October 2007) by grade (SOC: Standard Occupational Classification) and gender, religion and age are presented below.

Table 4: Gender by SOC Code

SOC Code	Male	Female	Total
9 - Other	0	1	1
4 - Administrative and Clerical	63	133	196
1 - Managers and Directors	202	159	361
Total	265	293	558

Table 5: Religion by SOC Code

SOC Code	P	RC	ND	Total
9 - Other	1	0	0	1
4 - Administrative and Clerical	100	82	14	196
1 - Managers and Directors	177	147	37	361
Total	278	229	51	558

Table 6: Age by SOC Code

SOC Code	20 30	31-40	41-50	51-60	61-65	Total
9 - Other	0	0	0	1	0	1
4 - Administrative and Clerical	77	68	34	14	3	196
1 - Managers and Directors	17	123	140	71	10	361
Total	94	191	174	86	13	558

External Data Sources

Alongside various sources of in-house data relating to the Corporate Plan, the EQIA has also been informed by relevant statistics relating to the Northern Ireland economy derived from numerous sources and including:

- 2005 Monitoring Report No. 16:
A Profile of the Northern Ireland Workforce.
Equality Commission for Northern Ireland.
- Labour Market Bulletins 13 - 20.
Department of Employment and Learning.
<http://www.delni.gov.uk/index/publications/pubs-stats/labour-market-bulletin.htm>
- National Statistics Local Area
Labour Force Surveys 2000 - 2003.
<http://www.statistics.gov.uk/lfs/>

CONSIDERATION OF ADVERSE IMPACT

While the labour market continues to be segregated in many ways and including those associated with Section 75 grounds, many of these economic inequalities lie outside the scope of Invest NI's work. Nevertheless we are confident that the new Corporate Plan will help to further equality of opportunity across the Northern Ireland labour market. Indeed, the Draft Corporate Plan 2008 - 2011 explicitly acknowledges our duties to promote equality of opportunity and good relations, and details various steps that have been taken to advance these duties.

Invest NI Acting Positively - Equality Planning

We currently operate according to internal annual equality plans which provide a strategic direction to the various equality initiatives underway each year. This plan also establishes systematic timescales and objectives for substantial pieces of work designed to promote equality of opportunity across the Northern Ireland labour market. This work is supported by our Equality Unit, along with 21 designated Equality Co-ordinators positioned across the organisation to ensure effective roll-out and implementation. All staff received half-day training in equality and diversity during 2007.

Invest NI remains committed to promoting equality of opportunity through all aspects of its business and sees this new Draft Corporate Plan as advancing and consolidating many of the initiatives already put in place, and consequently will not have an adverse impact on any of the nine Section 75 grounds.

Previous EQIAs of the Accelerating Entrepreneurship Strategy (2005) and Business Development Solutions (2007) have demonstrated the steps already taken, and the positive action measures put in place to promote equality of opportunity. These actions are reinforced by headline figures taken from our Performance Information Report 2002/3 -2006/7 indicating that:

'During the past five years (April 2002 - March 2007) 50 per cent of assistance offered by Invest NI was to clients located in areas of economic disadvantage. These areas contain 30 per cent of the population of Northern Ireland. Of the 69 first-time inward-investment projects offered assistance during the five years, 74 per cent had locations in disadvantaged areas, representing 78 per cent of assistance offered to all new Foreign Direct Investment (FDI) projects. In addition, 39 per cent of new high growth-potential locally-owned businesses offered assistance were located within these areas.'

Invest NI: Acting Positively - Disability Action Planning

Following the production of our Disability Action Plan we received useful feedback from consultees, including the Employers Forum on Disability on how to best implement the plan. As one example, we are now working in conjunction with this organisation to advertise all forthcoming positions through their online job bulletin board. All Invest NI staff received half-day training on disability awareness during 2007/8.

The following tables, taken from the BDS EQIA give an indication of existing financial support offered to programmes and schemes operating under Business Development Solutions by geographical area⁴.

Table 7 Financial Support by Region 2003/04

REGION	TOTAL			Assistance per head of adult pop (£)	Investment per head of adult pop (£)
	Number of offers	Assistance £m	Investment £m		
NORTH EASTERN	433	10.80	49.87	64.12	296.07
NORTH WESTERN	547	20.76	76.45	102.55	377.65
EASTERN	613	12.26	38.60	38.86	122.33
WESTERN	524	9.60	39.14	69.18	282.07
SOUTHERN	619	10.63	45.50	43.40	185.78
BELFAST	545	53.11	218.60	244.60	1006.77
TOTAL	3,281	117.15	468.15	91.01	363.69

Notes: 2001 Census adult population figures used

Table 8 Financial Support by Region 2004/05

REGION	TOTAL			Assistance per head of adult pop (£)	Investment per head of adult pop (£)
	Number of offers	Assistance £m	Investment £m		
NORTH EASTERN	557	17.30	76.30	102.71	452.98
NORTH WESTERN	655	11.79	70.75	58.24	349.49
EASTERN	610	17.16	66.92	54.39	212.09
WESTERN	705	12.04	58.31	86.77	420.22
SOUTHERN	665	27.09	102.45	110.61	418.31
BELFAST	528	45.27	119.20	208.49	548.98
TOTAL	3,720	130.65	493.93	101.50	383.72

Notes: 2001 Census adult population figures used

4 The six regions as identified by Invest Northern Ireland are defined by the following District Council Areas:
 North Eastern: Antrim, Ballymena, Ballymoney, Carrickfergus, Larne and Moyle
 North Western: Coleraine, Derry, Limavady, Magherafelt and Strabane
 Eastern: Ards, Castlereagh, Lisburn, Newtownabbey and North Down
 Western: Cookstown, Dungannon, Fermanagh and Omagh
 Southern: Armagh, Banbridge, Craigavon, Down, Newry and Mourne
 Belfast: Belfast City Council

Table 9 Financial Support by Region 2005/06

REGION	TOTAL			Assistance per head of adult pop (£)	Investment per head of adult pop (£)
	Number of offers	Assistance £m	Investment £m		
NORTH EASTERN	242	15.26	66.17	85.96	372.74
NORTH WESTERN	337	38.98	148.58	182.98	697.46
EASTERN	284	18.30	120.87	56.21	371.29
WESTERN	279	7.11	48.02	47.41	320.18
SOUTHERN	288	21.08	81.74	80.12	310.67
BELFAST	277	30.27	148.07	141.45	691.94
TOTAL	1,707	131.00	613.45	97.53	456.72

Notes: 2005/06 figures are provisional and may be subject to amendment. 2005 mid year adult population estimates used

Table 10 Invest NI Regions by Community Background

REGION	All Persons	Community background %		
		Catholic & Roman Catholic	Protestant and Other Christian (including Christian related)	Other / None
NORTH EASTERN	168,448	26.3	71.2	2.4
NORTH WESTERN	202,476	58.5	40.2	1.3
EASTERN	138,755	60.2	38.8	1.0
WESTERN	315,541	19.0	77.5	3.4
SOUTHERN	244,920	54.9	43.7	1.4
BELFAST	217,126	45.3	51.2	3.5
TOTAL	1,287,266	41.9	55.8	2.3

Notes: 2001 Census adult population figures used.
Population totals may vary from other Census tables due to cell adjustment methodology employed by the Census office.

These data were analysed in the BDS EQIA, leading to the following conclusion:

(From 2003 to 2006), 'the total assistance to companies through BDS has remained relatively constant, (while) the number of offers made has declined considerably, from a high of 3,720 in 2004/5 to 1,707 in 2005/6, suggesting a greater concentration on a more select group of companies. This concentration of offers does not appear to have impacted on each region disproportionately.

In terms of the distribution of available resources across Northern Ireland, over time there has been a consistent trend towards providing greater assistance to the Belfast area per head of population although this is unsurprising given that the number of companies is proportionately much higher in this region.

Historically, the Eastern region appears to have attracted the least amount of assistance, while by 2005/6 assistance provided to the Western region had declined significantly. The financial assistance provided per head of population to the North Western region has risen dramatically from 2004/5 (£58.24) to 2005/6 (£182.98), surpassing that provided to Belfast.

While there have been considerable shifts in support by region over time, no single demographic index such as population size or community background would appear to explain these findings. In the absence of contrary indicators it must be assumed that the levels of support that are applied for

(through offers) and gained (through assistance) must reflect on a complex interplay between numerous social, economic and demographic factors, but that Section 75 considerations, and including community background, do not appear to play a significant role.

It is worthwhile noting that Northern Ireland is a relatively small geographical area and evidence indicates that many investments draw their workforce from across the region as a whole. Recent information on labour mobility patterns produced by the Northern Ireland Statistical Research Agency (NISRA) demonstrates that approximately 55 per cent of those who work in the Belfast District Council Area reside in other areas.

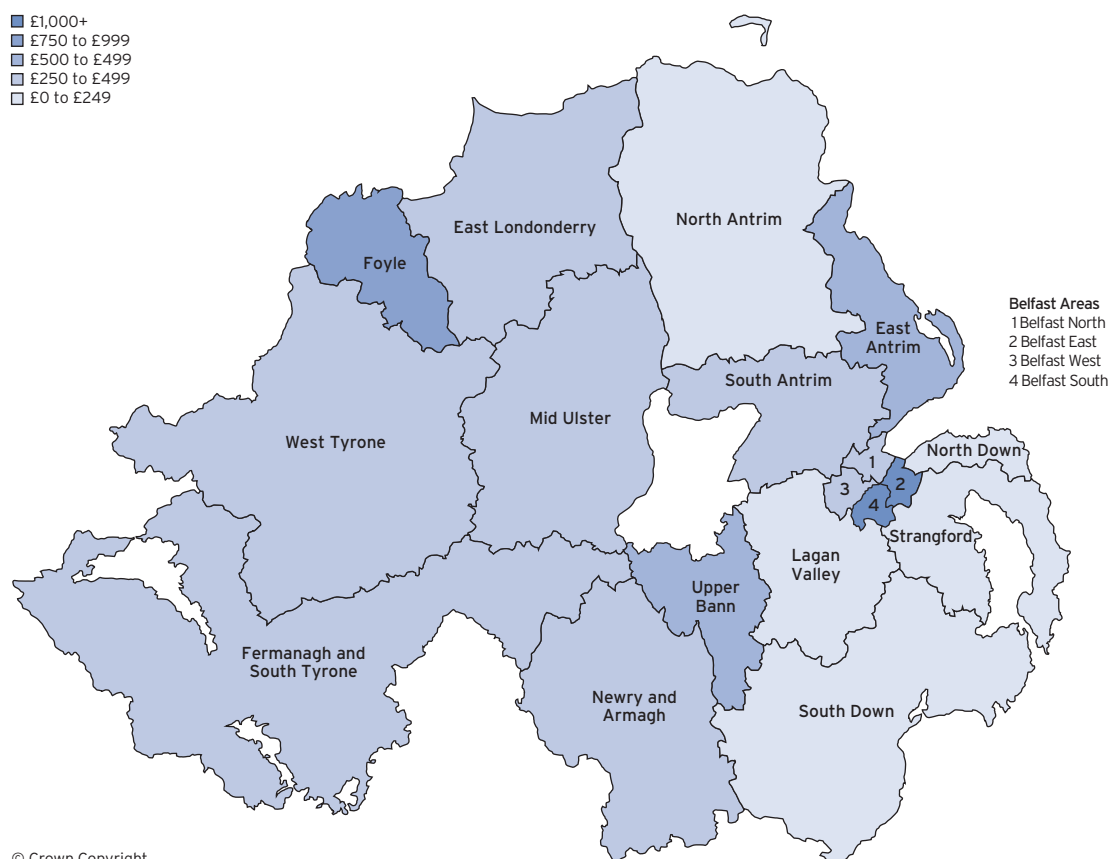
There is an increasing need for greater labour mobility along with improving skill levels and employability. The growing number of migrant workers moving to Northern Ireland demonstrates the availability of jobs for those prepared to travel. Since District Council Areas and Parliamentary Council Areas are not self-contained labour markets, they may not be meaningful areas to analyse patterns of assistance and investment activity.

Furthermore a large project assisted in a particular location has the potential to create benefits in a much wider area. For example, assistance provided to the Queen's University of Belfast to establish a Centre of Excellence, will accrue benefits to a much wider geographic area than just the South Belfast area in which it is located.'

This profile is confirmed in data presented in the Invest NI Performance Information Report 2002/3 - 2006/7.

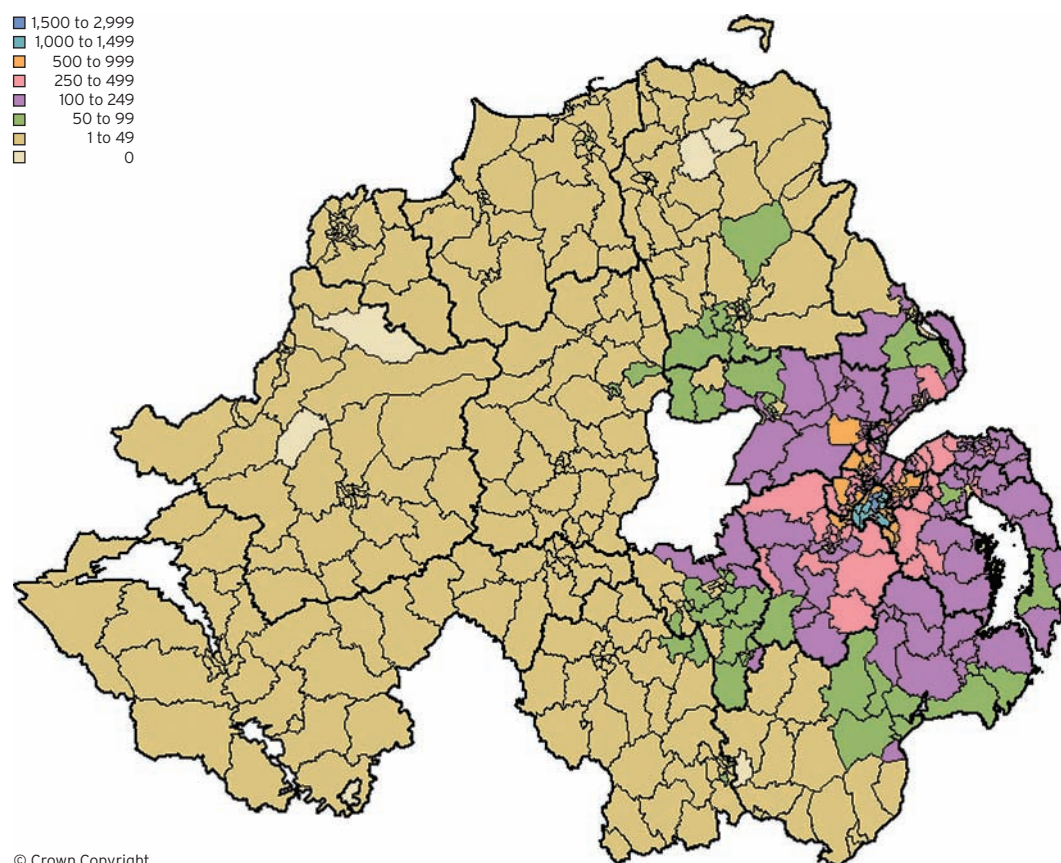
According to this report, during the five year period to end March 2007 Invest NI had offered £598 million of assistance, or £439 per head of adult population. The distribution of this money across NI is shown below.

Figure 1: Invest NI Assistance Per Head by Parliamentary Constituency



Assistance offered per adult population ranged from £119 per head in Strangford to £1,220 in South Belfast. To reiterate, the benefits arising from these investments will not be restricted to those who reside in a certain location. For example, 74 per cent of those working in South Belfast travel to the city from other areas, as the following figure reveals:

Figure 2: Number of Residents Travelling to Work in Belfast South Parliamentary Constituency.



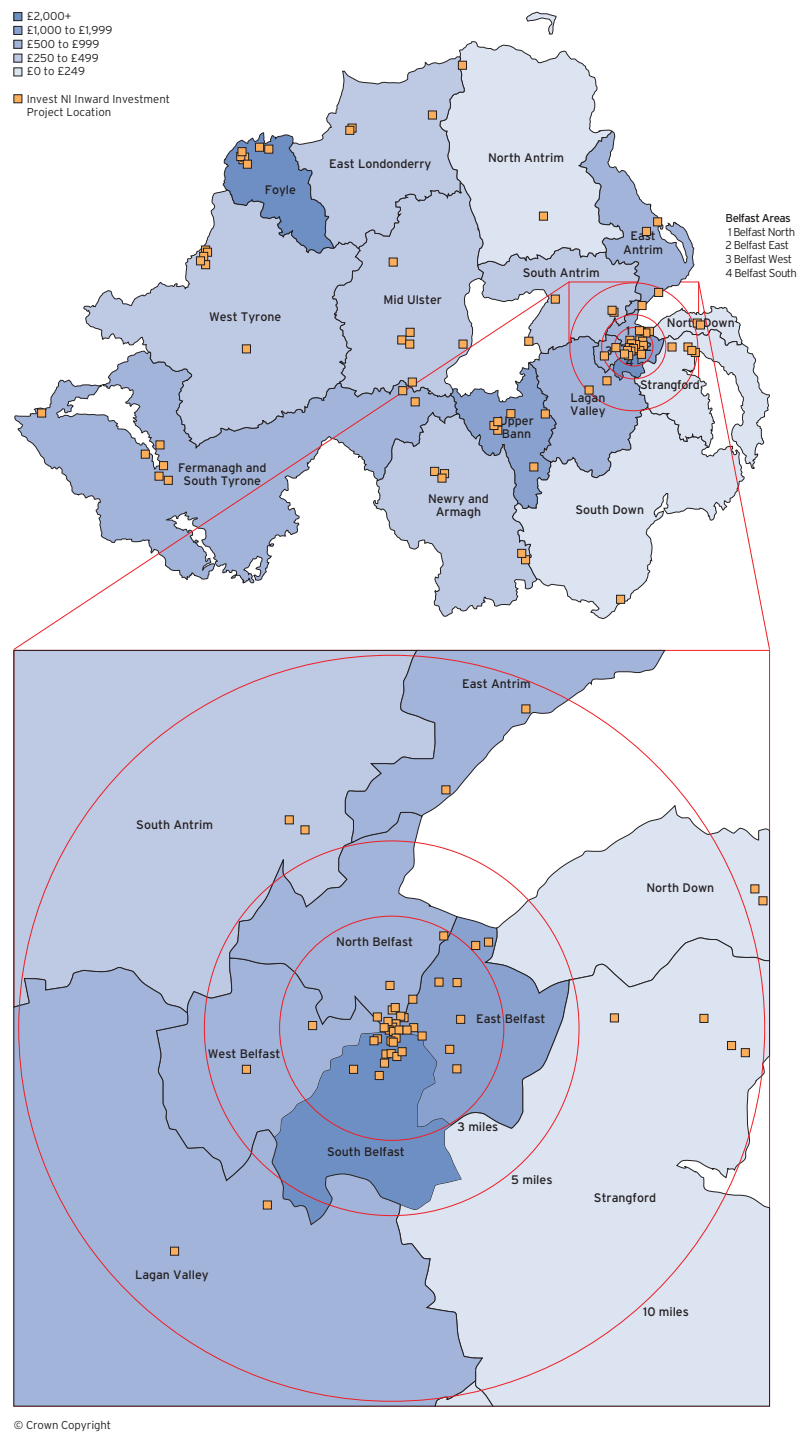
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Looking specifically at inward investment in the last five years, Invest NI has offered £216m to projects which plan to invest almost £1.1bn. This represents £158 of Invest NI assistance per head of adult population, contributing towards £781 of planned investment per head. Inward investment per adult population ranged from £108 per head in South Down to £2,925 in Foyle, as represented in Fig. 3 overleaf.

Invest NI: Acting Positively - Screening of Policies

Invest NI has in place a rigorous process for ensuring that all new and revised policies and programmes are subject to Section 75 screening using an in-house proforma screening form. This work is co-ordinated by the Equality Unit but overseen at local level within each division by a team of designated Equality Co-ordinators.

Figure 3: Invest NI Inward Investment per Head by Parliamentary Constituency



According to the report,
'Although Invest NI does not directly create jobs, it does provide assistance for businesses to improve their competitive position, which in turn may lead to employment creation. In respect of new internationally-mobile projects we do 'sell' the benefits of specific areas to foreign investors once they become serious about investing in Northern Ireland, but the final decision as to location rests with the companies themselves. Since much of the mobile foreign investment which Invest NI targets and wins is in the tradeable services sector, the main differentiator is the availability of skills in adequate quantity. Therefore, conurbations like Belfast have an advantage in that the area as a whole can provide critical mass. This provides opportunities to people who can commute relatively short distances.'

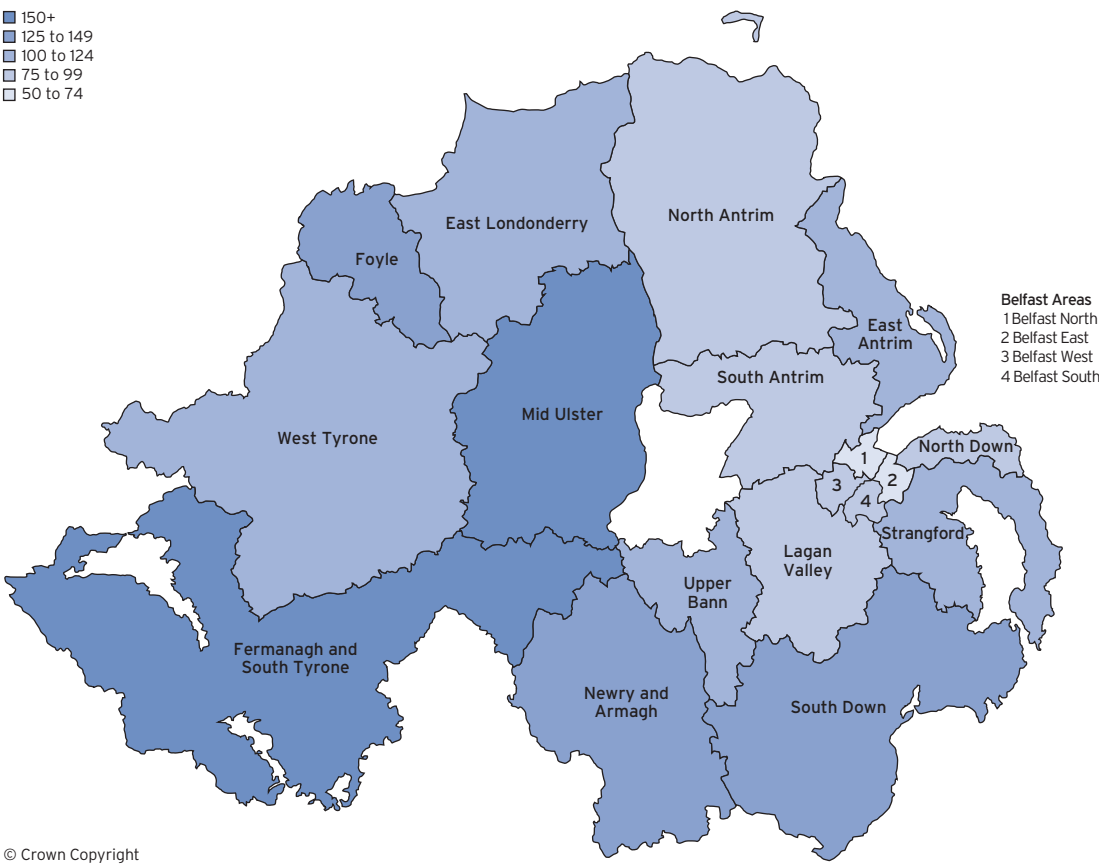
Invest NI: Acting Positively - Older Workers
Conscious of the particular needs of older workers, we now have in place an AES programme called PRIME aimed at encouraging entrepreneurial activity among those aged over 50. In October 2006 we also conducted Best Practice Club sessions with client companies throughout the province on Age Discrimination Legislation to help raise awareness in the wider business community.

Indigenous Business Start Ups by Parliamentary Constituency Area.

In terms of indigenous business start up activity, 15,326 offers were made in support of indigenous business start-up activity between 2002 and 2007, or 113 offers of assistance per 10,000 adult population in Northern Ireland.

Invest NI: Acting Positively - Promoting Women at Work
Following on from a series of earlier gender initiatives, under our AES suite of programmes we have recently introduced Pathways to Female Entrepreneurship. Through a range of projects this programme aims to encourage female entrepreneurship and entrepreneurial goals and opportunities.

Figure 4: Invest NI Start Ups Per 10,000 Head by Parliamentary Constituency



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Invest NI: Acting Positively - Childcare Vouchers
 During 2007 Invest NI introduced a Childcare Voucher Scheme for all its staff. During 2008 we aim to raise awareness of the benefits of Childcare Voucher Schemes directly to our wide range of client companies.

The 'East', 'West' and 'North West' Compared.

To consider investment in relation to larger areas where there will be a higher proportion of people who both live and work in that area, the report goes on to consider a breakdown by East, West and North West⁵ areas of Northern Ireland.

Figure 5: Assistance, Investment and Inward Investment in NI Regions

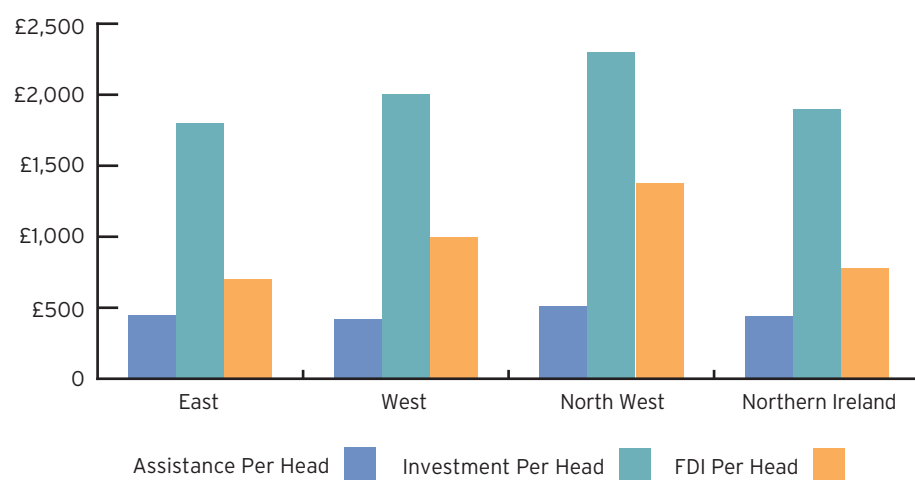


Table 8 Assistance, Investment and Foreign Direct Investment in NI Regions

Measure	East	West	North West	Northern Ireland
Assistance per Head	£446	£422	£513	£439
Investment per Head	£1,872	£2,019	£2,328	£1,912
Inward Investment per Head	£700	£999	£1,392	£781

⁵ In this analysis the 'North West' is part of the larger 'West' region.

Quoting directly from the report:

'Whilst assistance per head (of adult population) was slightly lower in the West (£422) compared to the East (£446) the amount of investment per head planned by companies arising from assisted projects was 8 per cent higher in the West than the East. In addition, the amount of inward investment per head was 43 per cent higher in the West than the East. With regard to the North West of Northern Ireland, each of these indicators of activity was higher than in the East or West. A major contribution to the higher rates of activity within the North West was major investments by Seagate and Du Pont in Derry.'

Furthermore, the report points out that:

'There remain major issues relating to economic inactivity and skills which need to be addressed so that inequalities at a personal, household, neighbourhood and community level may be reduced. There is much to be done to enhance the employability of those who are either unemployed, or lack the skills required to access the employment opportunities created by businesses assisted by Invest NI. The Department for Employment and Learning (DEL) recognises this challenge and in response introduced the concept of Targeted Initiatives (TIs), which originated in its Taskforce on Employability and Long-Term Unemployment report. These represent a range of labour market interventions supported by DEL to encourage those who have significant barriers to employment, to overcome these, improve their skill sets and subsequently enter the labour market. Invest NI works with DEL at all levels to ensure that we can make whatever contribution is appropriate and within our remit to help address these issues.'

Invest NI: Acting Positively - A Good Relations Strategy

During 2007 we have introduced a Good Relations Strategy that is specific to the business of Invest NI and this will continue into 2008 and beyond. As with our Annual Equality Plan this will provide us with a framework of targets and outcomes for the coming year. This strategy will consolidate a number of earlier projects designed to target areas of relative deprivation through selective investment, for example the Western Innovation Network (WIN) initiative and the North West Action Plan.

Reflecting on the available data relating to Invest NI's activities to date, and projecting these figures forward to the period 2008 - 2011, there is no evidence to suggest that there will be any adverse impacts attached to any of the targets, strategies and principles enshrined in the new corporate plan. Indeed, when considered in conjunction with Invest NI's existing measures to promote equality of opportunity, and working in partnership with our clients and other government agencies and departments, the Draft Corporate Plan 2008 - 2011 has considerable potential to further promote equality of opportunity and good relations within the Northern Ireland labour market.

Invest NI: Acting Positively - Migrant Workers

During 2007 we aimed to raise awareness throughout the organisation by promoting specific migrant worker events and days of note. Two such cases were for Anti Racist Workplace Week and also a number of actions attached to International Migrants' Day. Related events are already planned for the forthcoming year.

MEASURES TO MITIGATE / ALTERNATIVE POLICIES (Preliminary Recommendations)

Through its new Corporate Plan, Invest NI remains fully committed to making a contribution to stimulate economic growth in all parts of Northern Ireland, and including areas of relative deprivation, so as to help narrow the gap on key indicators such as economic inactivity. This work will continue with due acknowledgment that there are many deep-rooted social and economic issues that continue to conspire to create and sustain inequalities. To remedy these inequalities will require the co-ordinated efforts from all parts of government with support from the private sector.

Having considered available data and research and considered any adverse impact which may arise, it is proposed that Invest NI will build on our existing EQIAs in taking the following actions in respect of its Draft Corporate Plan 2008 - 2011:

1. Invest NI will work increasingly closely with DETI and DEL and the private sector in a responsive manner to contribute towards addressing existing and emerging inequalities in the Northern Ireland labour market, within our remit.
2. Working in conjunction with the Equality Commission for Northern Ireland, Invest NI has established an appropriate methodology for monitoring its clients and support services with regard to appropriate Section 75 grounds. The new Client Monitoring Strategy will be operational by April 2008.
3. Invest NI will remain responsive to emerging equality of opportunity issues associated with the labour market and in particular among its private sector clients. By way of example, projects are already addressing the needs of migrant workers and their families, older workers, female entrepreneurs, and raising awareness of childcare voucher schemes among SME clients.
4. In line with Equality Commission newly published Guide to Promoting Good Relations, during 2008 Invest NI will develop a good relations strategy and will consider positive action measures to support this strategy. For example, how best to market Invest NI's programmes and services where relevant among minority communities.
5. Ongoing training of all staff in relation to equality of opportunity and Section 75 responsibilities will remain a corporate priority. Where external agents or consultants work alongside Invest NI then their contractual responsibilities to meet our obligations under Section 75 will also be made clear.

6. The selection criteria that will continue to apply to any support, scheme or programme operated by Invest NI will continue to encourage equality of opportunity. Where additional criteria are introduced, for example to target an industrial sector or geographical area, then these will be clearly defined and set out, and any potential adverse impacts associated with these criteria will be considered.
7. Each programme will make explicit, in all documentation, that materials can be made available in alternative formats where necessary and on request for those who are not able to access written English.

8. Building on our 2007 Disability Action Plan and subsequent consultation period, we will continue to take forward the Plan through informed interventions.

These measures, when implemented, should further equality of opportunity generally, in compliance with Invest NI's obligations under Section 75 of the Northern Ireland Act 1998.

As previously stated in our Equality Scheme, the amended policies will be regularly monitored to ensure that no adverse impact occurs.

FORMAL CONSULTATION

Invest NI wishes to consult as widely as possible on the findings included in this EQIA, together with the preliminary recommendations offered above. The following actions are proposed:

- This report will be issued to all consultees listed in our Equality Scheme and to any members of the public on request.
- Prominent advertisement will be placed in local and regional newspapers inviting the public to comment on this matter in accordance with normal practice.
- A copy of the EQIA will be posted on Invest NI's website and on the intranet.

- Individual consultation meetings will be arranged with staff on request and with representatives of particular interest groups if requested.
- Publicity material will be made available at all Invest NI's operational locations.
- The report will be made available on request in alternative formats.

The arrangements for consultation are being co-ordinated by the Equality Unit to whom all enquiries should be made.

The closing date for responses is **29 April 2008**.

DECISION BY THE PUBLIC AUTHORITY

Following the formal consultation period and consideration of the findings from the consultation, Invest NI will reach a decision in terms of the EQIA process and will ensure that such decisions are implemented through the new Corporate Plan.

PUBLICATION OF RESULTS OF EQUALITY IMPACT ASSESSMENT

The outcomes of this EQIA will be published in the press and will also be posted on Invest NI's website. It will be made available in different formats on request where appropriate.

MONITORING FOR ADVERSE IMPACT

Invest NI will establish a system to annually monitor the impact of the policy in the future on relevant groups. This will be reviewed on an annual basis. The results of the monitoring will be widely and openly revised. If this monitoring/evaluation shows that the revised policy results in greater adverse impact than predicted, or if opportunities arise which would allow for greater equality of opportunity to be promoted, Invest NI will ensure the policy is revised.

APPENDIX 1:

Examples of Section 75 Groups

'Age'

For most purposes, the main categories are: those under 18; people aged between 18 and 65; and people over 65. However, the definition of age groups will need to be sensitive to the policy under consideration.

For example, (i) in relation to employment policies the middle aged are often a vulnerable group, pensionable age is different for men and women and legal ages for working and voting vary; (ii) in relation to policies concerning young people then narrower age bands are likely to be more appropriate.

'Marital status'

Married people; unmarried people; divorced or separated people; widowed people.

'Men and women generally'

Men (including boys); women (including girls); transgender people; transsexual people.

'Persons with a disability'

Persons with a disability as defined in Sections 1 and 2 and Schedules 1 and 2 of the Disability Discrimination Act 1995.

'Persons with dependants'

Persons with primary responsibility for the care of a child; persons with personal responsibility for the care of a person with a disability; persons with primary responsibility for the care of a dependant elderly person.

'Political opinion'

Unionists generally; Nationalists generally; members/supporters of any political party; other.

'Racial group'

Chinese; Irish Traveller; Indian; Pakistani; Bangladeshi; Black African; Black Caribbean; White; mixed ethnic group; any other ethnic group; nationality.

'Religious belief'

Protestant; Catholic; Hindu; Jewish; Islam / Muslim; Sikh; Buddhist; other religion; people of no religious belief.

'Sexual orientation'

Gay; lesbian; bisexual; heterosexual.

(This list is not exclusive but may be amended or added to as appropriate.)

APPENDIX 2: Equality Monitoring - Using data sourced from the Equality Commission for Northern Ireland (ECNI)⁶

Table 2a. Invest NI Client Company split by Region, Compared to the Wider Business Base
Within Invest NI Regional Office Areas within Northern Ireland

Invest NI Client Group										Equality Commission			
Regional Office	No. of Clients	Client Employment	% Employees Within			Total No. of Businesses	All Employment	% All Employees					
			Protestant	Catholic	ND			Protestant	Catholic	ND			
East	153	37,652	62	32	6	740	141,888	57	37	6			
North East	55	15,825	66	25	9	152	25,116	65	27	8			
North West	61	10,031	38	57	5	175	23,076	43	51	6			
Southern	86	15,378	49	43	8	216	30,358	45	48	7			
Western	54	9,201	37	54	9	149	16,612	39	54	7			
Grand Total	409	88,087	55	38	7	1432	237,050	54	40	6			

Notes:

1. Employment figures for the companies relate to more than the part of the business assisted by Invest NI
2. Companies assigned to geographical locations based on the location of their HQ. Locational employment data was unavailable from the Equality Commission.
3. The wider business base is a list of those private sector businesses (employing 26+ people) who have provided employment monitoring forms to the Equality Commission, this group includes the 409 Invest NI client companies.
4. The total usable sample of businesses from the Equality Commission was 1572. 140 of these had HQ addresses listed in GB and therefore could not be included in our analysis.

⁶ In order to include all relevant data in a single table, the font size for the following tables has been reduced. As a consequence, if you are unable to access this information please contact the Equality Unit from where alternative formats will be made available on request.

Table 2b. Invest NI Client Company Employment Split by Religion Compared to the Wider Business Base in East and West Northern Ireland

Regional Office	Invest NI Client Group				Equality Commission			
	No. of Clients	Client Employment	% Employees Within		Total No. of Businesses	All Employment	% All Employees	
			Protestant	Catholic	ND		Protestant	Catholic
East	294	68,855	60	33	7	1108	56	37
Western	115	19,232	38	55	7	324	41	53
Grand Total	409	88,087	55	38	7	1432	54	40
						237,050		6

Notes:

1. Employment figures for the companies relate to more than the part of the business assisted by Invest NI
2. Companies assigned to geographical locations based on the location of their HQ. Locational employment data was unavailable from the Equality Commission.
3. The wider business base is a list of those private sector businesses (employing 26+ people) who have provided employment monitoring forms to the Equality Commission, this group includes the 409 Invest NI client companies.
4. The total usable sample of businesses from the Equality Commission was 1572. 140 of these had HQ addresses listed in GB and therefore could not be included in our analysis.

If you require this brochure in an alternative format (including Braille, disk, audio cassette or in minority languages to meet the needs of those whose first language is not English) then please contact:

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