



Northern Ireland Assembly Business Trust

9 November 2010



**Invest NI is Northern Ireland's
economic development agency.**

**Our aim is to increase
business productivity and
support wealth creation in the
economy.**

Foundation for Growth



“A successful economy is characterised by high productivity, highly skilled and flexible workforce and employment growth”



PSA Targets

Improved Manufacturing /
Private Services Productivity

Employment Growth

Invest Northern Ireland's Role

**Grow a
dynamic
and
innovative
economy**

Support R&D

- **£120m** Investment in R&D
- **300** new companies into R&D

Increase export sales

- **600** new Exporters
- **1200** into new markets

Stimulate investment

- **£1.2bn** Investment in NI
- **£345m** new salaries

Attract FDI

- **6500** new jobs
- **5500** new jobs above PSM

Our Approach

Investment in:

Research and Development
Export and Trade
Strategy and Innovation
Skills and Training
Process Development
Technology Uptake
Sustainable Development
Property Solutions

Expanded wealth creating business



Entrepreneurship/
New Start-ups



Existing Client
Company Growth

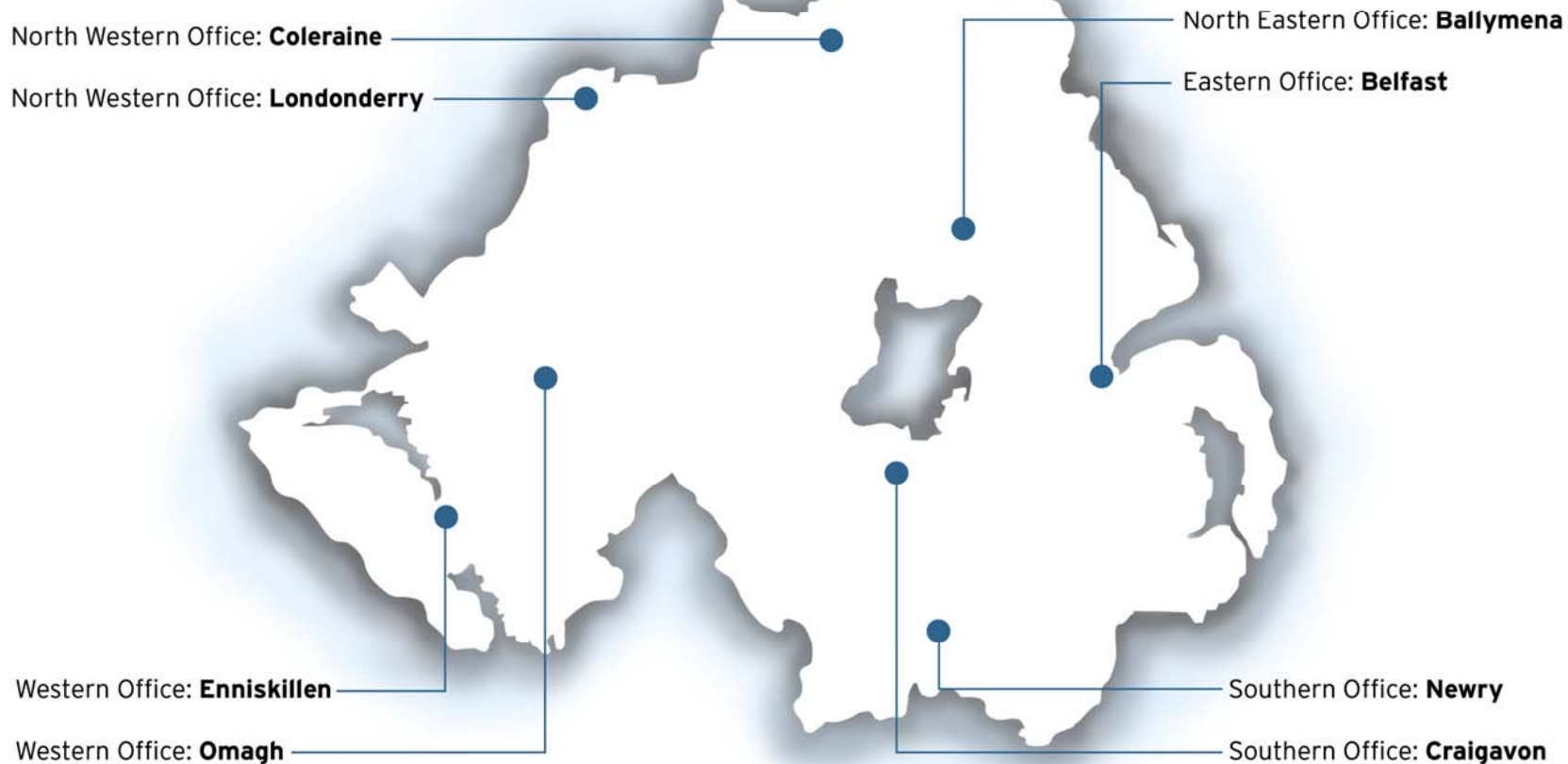


New Inward
Investment

Existing wealth creating business

Entrepreneurial Innovative International

Regional Office Network



Global Office Network



Growing local business



Through

Financial Support

Growing Exports

R&D Support

Management, leadership
and Skills Development

Energy, Waste and
technical advice

Supply chain and
collaborative networks

ICT & E-business support

Property provision

Technology & Creative Sectors

Sector Overview

Mobile Telecoms

Information Management

Security

Digital content

E-Health

Creative industries

100 international investors including:

- Allstate Corp;
- NYSE Technologies;
- Liberty Mutual;
- SAP;
- Openwave;
- Cybersource

Industry Clusters

900+ ICT Companies

Telecoms (Openwave, BTI
mFormation, Broadsoft)

Financial Technology –
Allstate, Citi, Liberty

Data Management –
Autonomy, Microficus

Grid Computing – SAP,
ASG, HP

Security – Q1 Labs, Tyco,
Mitie

Healthcare IT – Navinet,
Northgate

Film & TV Production –
HBO, Universal, Playtone

Over 15,000 people employed across 900 companies.

c1,000 graduates annually in ICT and related subjects.

61% of IT professionals educated to at least degree level.

13 university ICT related research centres.

UU has largest ICT course provision in Ireland and one of largest in UK.

Financial Services Activities in Northern Ireland

IT	Legal / Compliance	Risk / Actuarial	Operations	
<div>Citi NYSE Allstate Liberty Mutual</div>	<div>Citi Santander Axa</div>	<div>Citi NYSE Allstate Mercer</div>	<div>Citi Bank of Ireland Sec. Service Santander</div>	<div>26,500 people in the sector</div> <div>c2,200 graduates annually in relevant disciplines.</div> <div>Surplus of 850 graduates annually in accounting, finance & business.</div> <div>Surplus of 500 legal graduates each year.</div>
<div>Software dev. & support services;</div> <div>Infrastructure technology support:</div> <div>R&D</div>	<div>Documentation negotiation;</div> <div>Legal control; Front office support;</div> <div>Disclosure and reporting</div>	<div>Actuarial valuations;</div> <div>Risk & perf. analytics;</div> <div>Quant modelling;</div> <div>R&D</div>	<div>Trade settlement & reconcillations;</div> <div>Derivative processing;</div> <div>Fund accounting Customer services</div>	

Activities in Northern Ireland support capital markets banking; asset management; fund servicing, trading exchanges; payments; retail banking; insurance and assurance.

Business Services

Shared services

Companies

Caterpillar
Terex
Grafton Recruitment
Norfolkline
Regus

Activities

Finance and accounting
IT support
Payroll
Sales and marketing
Purchasing

Customer contact

Companies

TeleTech
Allstate
HCL
Firstsource
Capita
gem

Activities

Customer service
Outbound sales
Technical support
Business Process
Outsourcing
Multilingual support

14,000 people in the sector

10,000 university students studying:

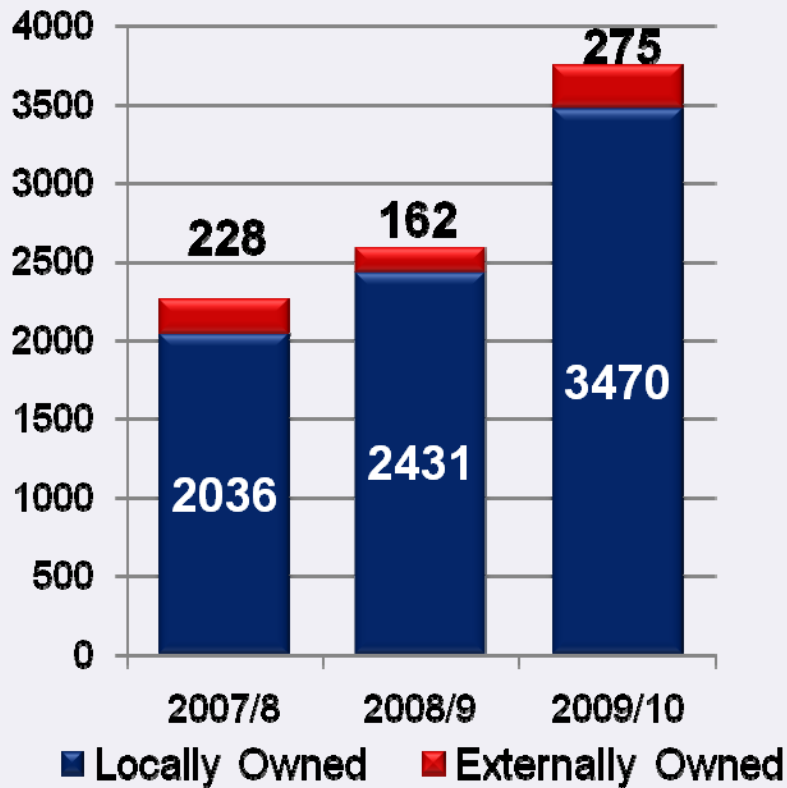
- Business & Administration, Economics & Mathematics
- Law

Higher value skill sets including:

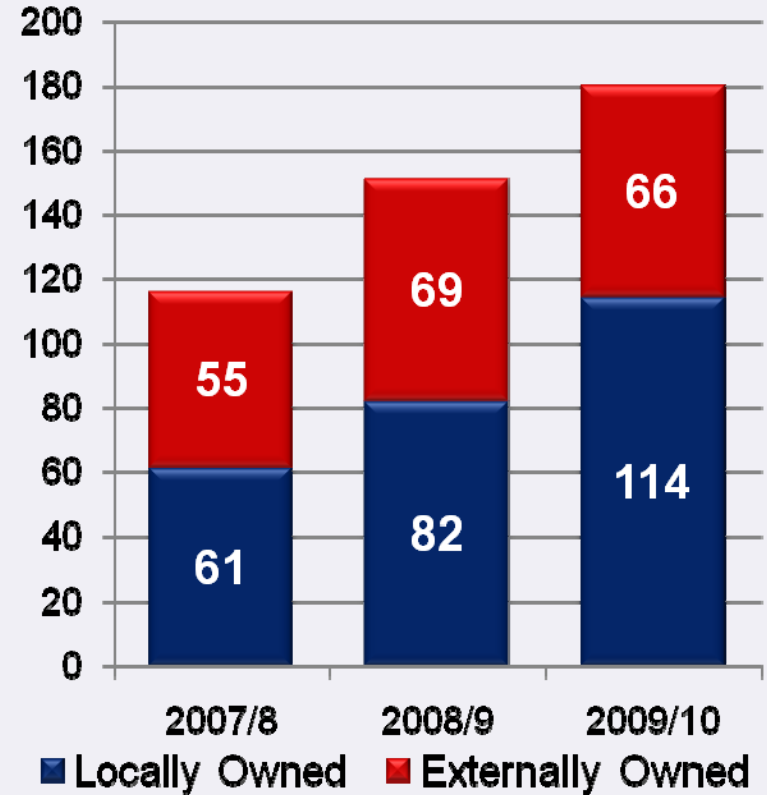
- Legal services outsourcing
- Finance and accounting
- Market research and analytics

Invest NI performance

Total Offers

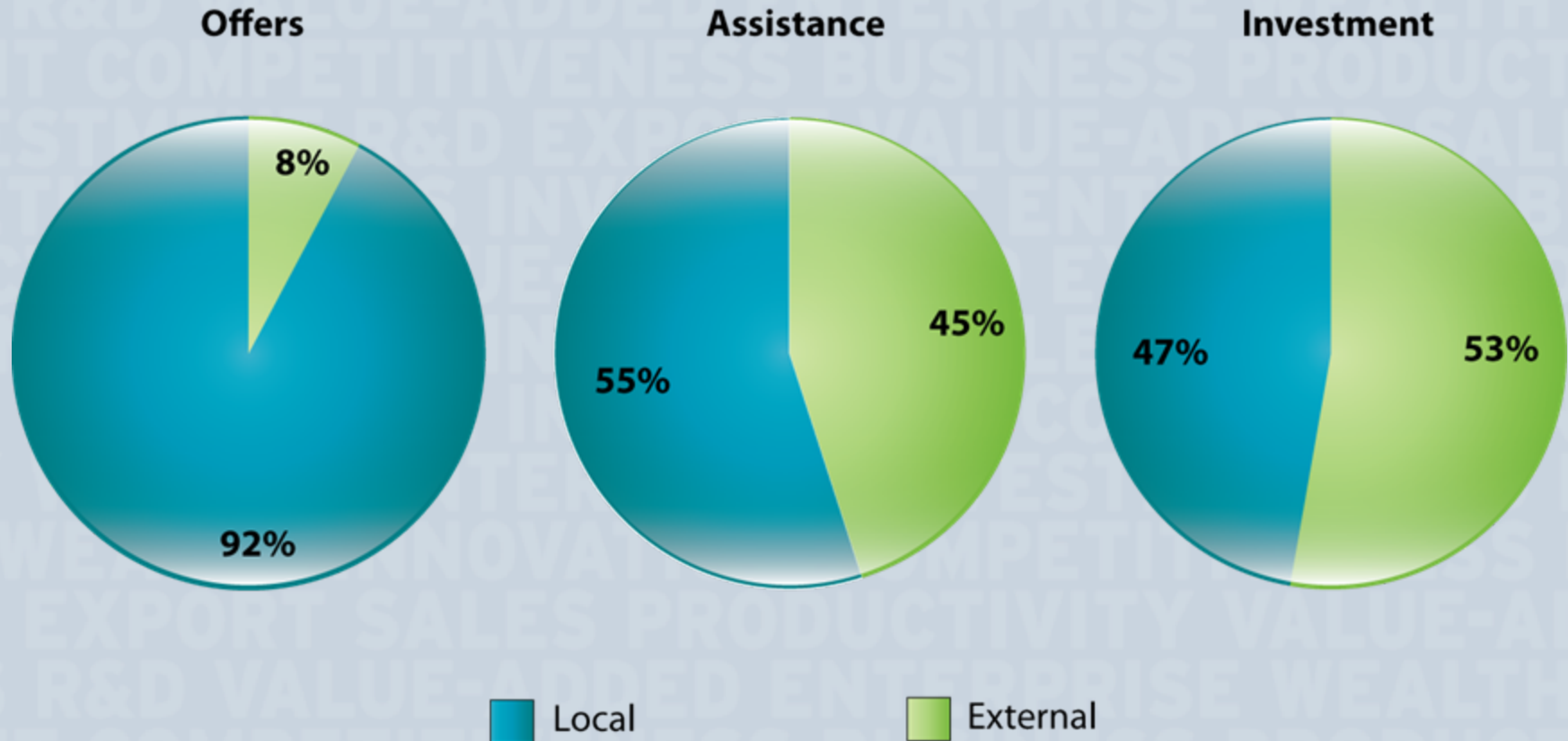


Assistance Offered - £m



Offers, Assistance & Investment

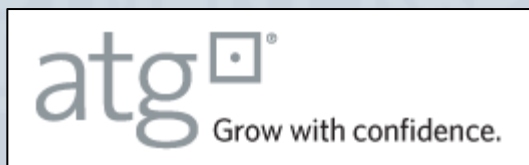
Local vs. External 2002-03 to 2009-10



Recent Successes – Employment Related Projects



MERCER



Company	New Jobs	Wages and Salaries pa
Citi	501	£16m
Market Resource Partners	106	£2.7m
Mercer	45	£1.3m
ATG	50	£2m
GE Energy	104	£2.5m
Kingspan	163	£4m
L&T Infotech	85	£3m
Thompson Aero	49	£3m
Terex	35	£0.9m
Dow Chemical	25	£0.9m
Mitie	37	£0.9m

Performance against Targets

**Grow a
dynamic
and
innovative
economy**

Support R&D

- £120m Investment in R&D -£291m
- 300 new companies into R&D -279

Increase export sales

- 600 new Exporters - 627
- 1200 into new markets - 1304

Stimulate investment

- £1.2bn Investment in NI -£1.1bn
- £345m new salaries -£402m

Attract FDI

- 6500 new jobs - 7193
- 5500 new jobs above PSM -4486

Building on Progress To Date

- Reduction in full-time equivalent staff from 738 to 575
- Annual absence rate c3% - half NICS average
- Reduction in average casework processing times from 46 days to 20 days

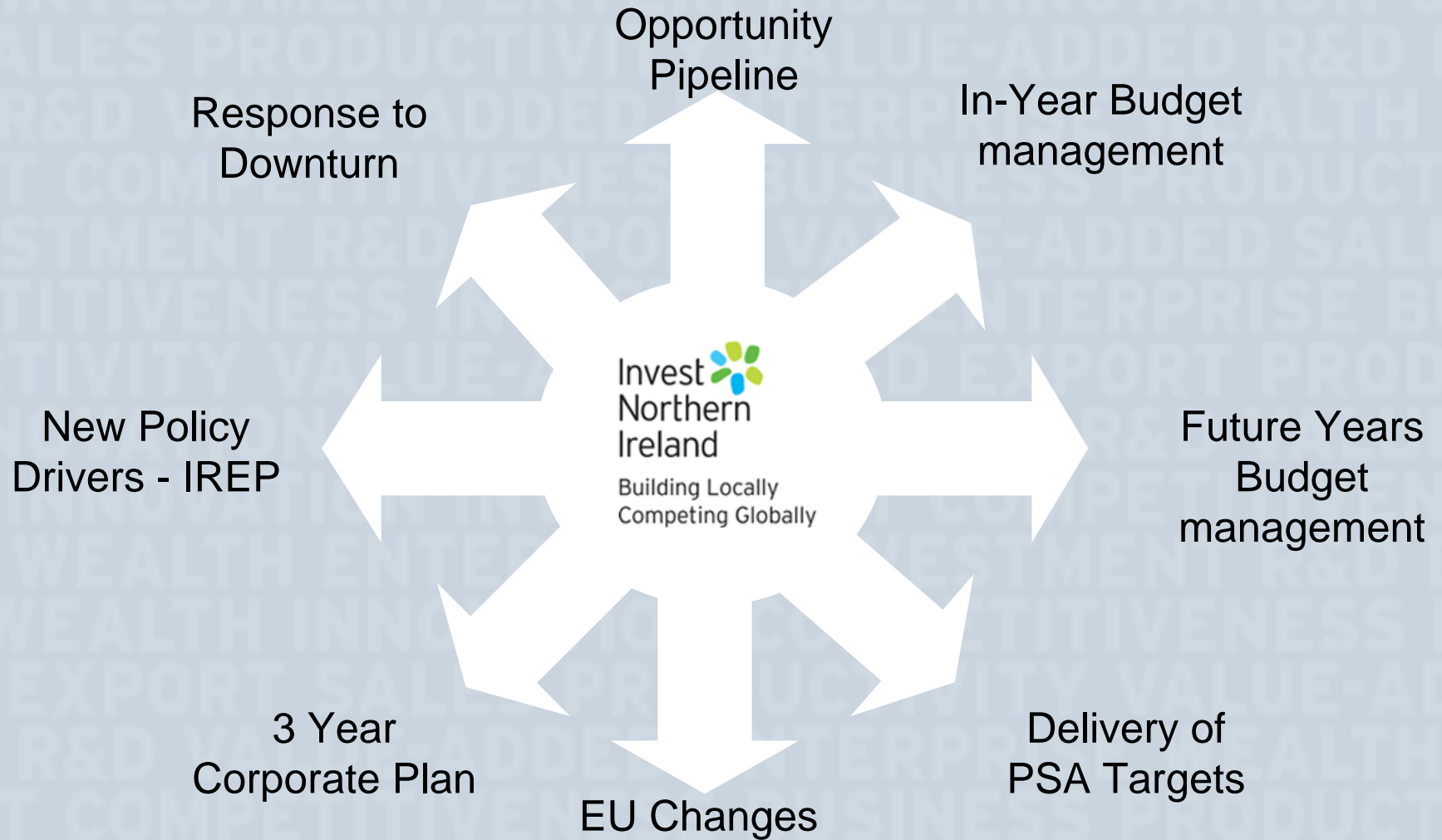
Moving From...

- Targeted client approach
- Bespoke solutions for all
- Complex end to end processes
- Customers perceive as slow
- Divisional opportunities prioritised
- Complex budget management
- Risk averse
- Unclear reporting of outcomes
- Complex product set

To...

- Range of support to wider base
- Segmented solutions
- Improve customer experience
- Improve speed of response
- Maximise all opportunities
- Budget flexibility
- Risk manage & improve returns
- Open transparent reporting
- Simplify & consolidate products

Managing Priorities



Northern**Ireland**

smart at work

