Preface

Ireland Northwest, centred on the Derry-Letterkenny City Region, is exceptionally well placed as an investment hub for business and global companies seeking to establish a gateway to both the UK and EU markets. Ireland Northwest is renowned for its rich tourism, its culture and its heritage offerings, with an established reputation as a compelling investment proposition.

It is a perfect location for businesses to invest and grow. As investors seek to form solid foundations on which to base future investment decisions and with a foothold firmly in the EU and the UK, our clear message is that Ireland Northwest can provide the stability and the options that your business needs.

Derry City and Strabane District and Donegal County Councils are proactively taking a leadership role to profile Ireland Northwest as an investment location and promote this cross-border gateway region’s unique economic, social, cultural and environmental assets. The strength of the region is underpinned by a collaborative approach which sees agencies and local stakeholders working together with the support of central government departments on both sides of the border. We have an ambitious investment programme in infrastructure, research, innovation and skills to ensure that the region remains cost competitive, well-resourced and among the very best in Ireland and the UK to live in, to work in and to invest in.

We are an accessible, connected and business friendly gateway region and have a vision for greater international impact.

Ireland Northwest delivers a unique combination of benefits for relocating and expanding businesses, it has a proven track record in hosting leading international companies such as Pramerica, Seagate, Randox, DuPont, Allstate, OneSourceVirtual, Zeus and Optum. These companies are already reaping the benefits of operating in Ireland Northwest and provide robust testimonies for the new companies that are attracted annually. Companies and businesses are attracted by the talented and educated workforce, the value balance, superb quality of life and collaborative business environment.

Ireland Northwest offers significant cost advantages compared to the rest of Ireland, UK and most of Western Europe. This combined with value-adding benefits makes the case for investment clear and compelling.
The facts

Ireland Northwest

40,000 Skilled workforce

Home to a 410,000 population

Home to 40 overseas companies

35% of workers under 27 years old

Youngest population in Europe

40,000 Third level students

Highly educated workforce

Prime office rents as little as $12 per sq ft

World class wireless and high speed broadband activity

A high capacity, low-latency transatlantic cable system

Among the fastest North American connection from Western Europe

Prices are contractually capped and 20% less than Glasgow/Manchester/Dublin

A SUPER CONNECTED GATEWAY

Ireland NW is accessible and connected, boasting fast links to Belfast, Dublin, Cork and Galway.

1 hour flight time to London & 2 hour flight time to Europe

Hourly direct rail link to Belfast and connection to Dublin

Within easy reach of 2 international & 4 regional airports with direct flights to the USA, US customs pre-clearance and Gulf States, Asia and European connections.

DIGITAL CONNECTIVITY

- ‘Digital Suburb’ of the major Cities in the USA, Canada, the UK and Continental Europe
- A high capacity, low-latency transatlantic cable system
- Among the fastest North American connection from Western Europe
- Prices are contractually capped and 20% less than Glasgow/Manchester/Dublin

410,000 Population

Home to 35,000 overseas companies

Youngest population in Western Europe

Irish NW is accessible and connected, boasting fast links to Belfast, Dublin, Cork and Galway.

1 hour flight time to London & 2 hour flight time to Europe

Highly educated workforce

Prime office rents as little as $12 per sq ft

World class wireless and high speed broadband activity

A high capacity, low-latency transatlantic cable system

Among the fastest North American connection from Western Europe

Prices are contractually capped and 20% less than Glasgow/Manchester/Dublin

40,000 Third level students

Highly educated workforce

Prime office rents as little as $12 per sq ft

World class wireless and high speed broadband activity

A high capacity, low-latency transatlantic cable system

Among the fastest North American connection from Western Europe

Prices are contractually capped and 20% less than Glasgow/Manchester/Dublin
Gateway to growth map

Ireland Northwest has proximity to 2 international airports, 4 regional airports, 2 deep sea ports and a primary road network.

PROJECT KELVIN
This project directly connects Northern Ireland to North America and Europe, providing a high capacity, secure and reliable network through Hibernia’s industry leading fibre optic submarine cable. The network attracts local and global companies who require fast, low latency bandwidth.
Why invest in Ireland Northwest?

Ranked Top Ten Economies in the world for ease of doing business and starting a business

The region’s strengths in life sciences, business services, technology, advanced manufacturing and engineering are supported by our third level institutes and our R&D institutions of excellence. Ireland Northwest comprises Donegal County Council and Derry City and Strabane District Council areas covering an area of 2,394 square miles with the city of Derry-Londonderry and Letterkenny as its linked gateways.

Blue chip companies continue to invest in Ireland Northwest including international players such as:

• Abbott
• ZEUS
• Fujitsu
• HML
• Investa
• KOFAX
• Scapio
• Peamerica
• Neills
• Investa
• Randox
• Allstate

“Our Experience in Northern Ireland far exceeded our expectations. We came here originally for the cost savings. We find ourselves staying for the people and the talent that’s available.”

Allstate - ICT/Business Services
**Growth sectors**

**DIGITAL AND CREATIVE TECHNOLOGIES (DCT)**
- **Companies (number):** 95
- **Availability of talent (graduates):** 5400+
- **Centres of excellence:** Intelligent Systems Research Centre (ISRC), Cognitive Analytics Research Lab (CARL), WiSAR Lab & Co Lab (LYIT)

**ADVANCED MANUFACTURING AND ENGINEERING (AME)**
- **Companies (number):** 245
- **Area of expertise:** Automation Technology, Agricultural – Machinery, Quarry/Mining Machinery, Materials Handling, Print & Packaging, Mechanical Engineering, Electrical Engineering, Precision Engineering & Fabrication
- **Availability of talent (graduates):** 3000+
- **Centres of excellence:** Centre for Engineering & Renewable Energy (CERE), Intelligent Systems Research Centre (ISRC), Coginflow Analytics Research Lab (CARL), Co Lab (LYIT), Wind Energy Centre (LIT)

**BUSINESS, FINANCE AND PROFESSIONAL SERVICES (BFPS)**
- **Companies (number):** 340
- **Area of expertise:** Accounting, Law/Legal Practice, Business Process Outsourcing, Shared Service Centres, Customer Contact Centres, Back & Middle Office
- **Availability of talent (graduates):** 5900+
- **Centres of excellence:** Intelligent Systems Research Centre (ISRC), Ulster University Legal Innovation Centre, Cognitive Analytics Research Lab (CARL), CoLab, WiSAR Lab & Co Lab (LYIT)

**LIFE AND HEALTH SCIENCES (LHS)**
- **Companies (number):** 30
- **Area of expertise:** Point of Care Testing, In Vitro Diagnostics, Clinical Modelling, Data Analytics/Medical Bioinformatics, Phase III & IV Clinical Trials, Neurosciences, Stratified Medicine, Medical packaging, Medical Device Manufacturing
- **Availability of talent (graduates):** 3210+
- **Centres of excellence:** Clinical Translational Research & Innovation Centre (C-TRIC), NI Centre for Stratified Medicine, ISRC (Intelligent System Research Centre), WHSCIS Research Office, WiSAR Lab

---

**IRELAND NORTHWEST ECONOMIC DEVELOPMENT INITIATIVE**
Case study

ZEUS INDUSTRIAL PRODUCTS

Zeus is the world’s leading polymer extrusion manufacturer and material science innovator. Zeus specialises in providing high-performance extruded tubing solutions to many industries. The company continually works to develop and improve processes and to design advanced products that meet the rapidly changing demands of the medical, science, technological and manufacturing fields. From bioabsorbables and nano-fiber membranes to wires and cables, the company is an innovator in many industries. Zeus chose Letterkenny as its European base to ensure that its European customers receive a quick turnaround and taking into consideration the quality of life that Letterkenny would offer its employees.

PRAMERICA

Pramerica is a business and technology operations subsidiary of US based Prudential Financial, Inc. – a financial services giant with assets of more than $1.1 trillion and operations in Asia, Europe and Latin America. Founded in 2000 with 8 employees, Pramerica has grown steadily and now have over 1,500 talented individuals who benefit from working in a thriving and diverse company where the opportunities are endless.

In October 2017 Pramerica continued its long-term commitment to County Donegal opening a new $49m, 130,000-square-foot campus features green technologies for electricity generation and rainfall harvesting in Letterkenny. It has parking for more than 1,000 vehicles, landscaped and green areas for staff recreation and many other amenities.

Barbara Koster, senior vice president and chief information officer for Prudential, “This new campus ensures that the immensely talented people who work here have every resource they need to provide excellent service to the customers they support. The exceptional community backing we enjoy here only adds to the success.”

ALLSTATE

Ireland Northwest is fast becoming a major hub for the business services industry and according to insurance giant Allstate, there are two key ingredients; people and talent.

The Allstate Corporation is the largest publicly held personal lines property and casualty insurer in America and the third largest personal insurance company in the country. Allstate’s twin locations in Derry City and Strabane provide high quality software development services and business solutions in support of the US parent’s global operations and is responsible for developing, transforming and maintaining the various technology platforms used within Allstate.

The decision to locate in the region has been rewarded with huge cost savings, according to Suren Gupta, Executive Vice President, Allstate Technology and Operations, who says: “Every day in Northern Ireland we save half a million dollars. As a result of locating in Northern Ireland 15 years ago, Allstate has saved over a billion dollars.”

Ireland Northwest’s talent pool is so important according to Georgina O’Leary, area leader for the Derry branch. She said, “It’s a reflection of the remarkable IT skills resource of the Derry-Londonderry region that a local company is responsible for software engineering and development for one of America’s largest insurance companies.”

“The availability of highly-skilled and educated people, the favourable business environment and strong national support had played a large factor in the decision to locate the new operation in Letterkenny”

Zeus Industrial Products
Innovation, creativity & knowledge

Ireland Northwest offers a talent pool to rival the best

Derry-Londonderry is the 4th largest urban settlement in Ireland and together with Letterkenny and Strabane, the City Region boasts over 40,000 students. It is no surprise that the region is bubbling with innovative start-ups and a wealth of creative new companies.

There’s something special happening here. That thirst for knowledge has also resulted in booming research and development and innovation, based on practical cooperation between business and academia, ensuring that this is a great location for business. Our thriving indigenous companies are also helping to strengthen the sector clustering here.

You can tell how forward-looking a region is by the quality of its research and innovation - and by that standard Ireland Northwest is doing spectacularly well. Ireland Northwest has a well-established eco-system that encourages innovation, R&D and entrepreneurship so that the region has the capacity to adapt in an ever changing and more competitive environment. Our ICT strength is based on talented people, industry-academia collaborations, supportive local government and state agencies and a track record of meeting the needs of business.

Our employees are hardworking, dedicated, very innovative, and they come up with some great solutions

Dr Brian Burns, Seagate

There’s something special happening here. That thirst for knowledge has also resulted in booming research and development and innovation, based on practical cooperation between business and academia, ensuring that this is a great location for business. Our thriving indigenous companies are also helping to strengthen the sector clustering here.

You can tell how forward-looking a region is by the quality of its research and innovation - and by that standard Ireland Northwest is doing spectacularly well. Ireland Northwest has a well-established eco-system that encourages innovation, R&D and entrepreneurship so that the region has the capacity to adapt in an ever changing and more competitive environment. Our ICT strength is based on talented people, industry-academia collaborations, supportive local government and state agencies and a track record of meeting the needs of business.

There's something special happening here. That thirst for knowledge has also resulted in booming research and development and innovation, based on practical cooperation between business and academia, ensuring that this is a great location for business. Our thriving indigenous companies are also helping to strengthen the sector clustering here.

You can tell how forward-looking a region is by the quality of its research and innovation - and by that standard Ireland Northwest is doing spectacularly well. Ireland Northwest has a well-established eco-system that encourages innovation, R&D and entrepreneurship so that the region has the capacity to adapt in an ever changing and more competitive environment. Our ICT strength is based on talented people, industry-academia collaborations, supportive local government and state agencies and a track record of meeting the needs of business.
Talent, skills & resources

A Generation of Fresh Thinking

A strong cross border collaboration between institutions ensure students are equipped with the right skills and are employment ready. Circa 7,000 graduates annually ready for employment.

C-TRIC provides an excellent opportunity for both local and international companies wishing to exploit the connection between world class Health, Business and Academic sectors!”

Trung Do, Executive Director of Business Development at Partners HealthCare

LABOUR POOL

35% population under 25 years old
103,530 in employment
High levels of staff retention
Depth of skill available
Highly competitive salaries:
> HR Admin $19,000pa
> Financial Accountant $25,000pa
> IT Technical Support $28,000pa
> Software Test Analyst $33,000pa
> Software Developer $30,000pa

TALENT PIPELINE

40,200 third level students
Top-performing region in post primary education at age 16 and age 18 (high school diploma equivalent)
31% school leavers educated to degree level
Pipeline of migration to Ireland Northwest from EU and non-EU
Educational institutions of excellence:
> Ulster University
> Letterkenny Institute of Technology
> NW Regional College

35%
103,530
High levels of staff retention
Depth of skill available
Highly competitive salaries:
> HR Admin $19,000pa
> Financial Accountant $25,000pa
> IT Technical Support $28,000pa
> Software Test Analyst $33,000pa
> Software Developer $30,000pa

40,200
Top-performing region in post primary education at age 16 and age 18 (high school diploma equivalent)
31% school leavers educated to degree level
Pipeline of migration to Ireland Northwest from EU and non-EU
Educational institutions of excellence:
> Ulster University
> Letterkenny Institute of Technology
> NW Regional College

Northwest Regional College (NWRC)
> Leading provider of vocational courses & foundation degrees
> Centre of excellence in software engineering
> 20,000+ students each year
> Dedicated business support centre
> 25+ global partner institutions
> Recruitment of international foundation

Letterkenny Institute of Technology (LYIT)
> 4000+ students
> 50+ global partner institutions
> 4 x academic schools
> Business
> Tourism
> Engineering
> Science
> Significant Research Partnerships
> Growing International Student base

Ulster University (Magee Campus)
> Top 10 entrepreneurial universities globally
> £42m invested in R & D
> Top 25% of UK universities for world leading research (REF 2016)
> 5000 students & 150+ courses
> Medical school in development
- Specialisms in technology and innovation
- 80 students per year (Graduate entry)
Confucius Institute
- Heart of city/region’s economic development
- Joint leadership team meetings
- By 2025 9,400 FTE students
- Partnership with NWRC

“C-TRIC provides an excellent opportunity for both local and international companies wishing to exploit the connection between world class Health, Business and Academic sectors!”

Trung Do, Executive Director of Business Development at Partners HealthCare

Labour Pool

Talent Pipeline

University Region

Economic Development Initiative
Investing in our future

**Capital Investment**

Making it Happen: We are a Connected Region with a series of ambitious and exciting infrastructure projects designed to further consolidate the Ireland Northwest region’s proposition as a key investment location.

**Roads Infrastructure**

$170m

Improving connections and reducing travel times between Derry & Belfast and key cross-border cities including Dublin & Galway.

**Transport Infrastructure**

$92m

In planned transportation infrastructure projects that will reinforce our status as connected hub.

**Public Sector Investment**

$461m

In Strategic regional sporting & leisure projects across the region.

$98m

In the regional acute hospital as a centre of excellence in medical innovation.

$26m

Establishment of NW Medical School.

**Global research & technology centres of excellence**

**Clinical Translational Research & Innovation Centre (C-TRIC)**

- Unique facility promoting and facilitating translational and clinical research
- 1 of 2 centres in UK
- Home to 1 of only 170 active MEG labs worldwide
- Area of expertise includes:
  - Neuro-Engineering
  - Brain Computer Interfacing
  - Cognitive Robotics
  - Wireless Systems
  - Artificial Intelligence & VR

**ISRC (Intelligent System Research Centre)**

- Located at Ulster University Magee Campus
- Dedicated to the creation of intelligent computational systems
- Home to 1 of only 170 active MEG labs worldwide
- Area of expertise includes:
  - Neuro-Engineering
  - Brain Computer Interfacing
  - Cognitive Robotics
  - Wireless Systems
  - Artificial Intelligence & VR

**Centre for Engineering & Renewable Energy (CERE)**

- Located at Ulster University Magee Campus
- Worked with Boeing, Bombardier, Airbus & Terex
- Expertise in:
  - Engineering
  - Mechanical; electrical and electronic engineering

**Cognitive Analytics**

**Clinical Translational Research & Innovation Centre (C-TRIC)**

- Unique facility promoting and facilitating translational and clinical research
- 1 of 2 centres in UK
- Home to 1 of only 170 active MEG labs worldwide
- Area of expertise includes:
  - Provision of incubation space for companies
  - Clinical assessment of devices
  - Research ethics and governance
  - Integrated research application system form completion
  - Designing and running medical device assessment studies
  - Patient recruitment and sample collection for studies
  - Designing and running medical device assessment studies
  - Patient recruitment and sample collection for studies
  - Designing and running medical device assessment studies
  - Patient recruitment and sample collection for studies

**WISAR Lab**

- Located in the Letterkenny Institute of Technology (LYIT).
- State of the art RF lab to support R&D
- Expertise in Wireless Tech, Embedded Systems & Power Electronics
- Particular expertise in Body Area Networks (BAN) and the application of WSNs in buildings

**Legal Innovation Centre**

- Promotes and supports the use of technology in legal services
- Education and training in emerging legal technologies
- Collaboration of researchers, legal practitioners and technologists
- Expertise in:
  - Engineering
  - Renewable energy
  - Mechanical; embedded systems and Power Electronics

**Wisar Lab**

- Located in the Letterkenny Institute of Technology (LIT).
- State of the art RF lab to support R&D
- Expertise in Wireless Tech, Embedded Systems & Power Electronics
- Particular expertise in Body Area Networks (BAN) and the application of WSNs in buildings

**1918 Ireland Northwest Economic Development Initiative**

**Roads Infrastructure**

$170m

Improving connections and reducing travel times between Derry & Belfast and key cross-border cities including Dublin & Galway.

**Transport Infrastructure**

$92m

In planned transportation infrastructure projects that will reinforce our status as connected hub.

**Public Sector Investment**

$461m

In Strategic regional sporting & leisure projects across the region.

$98m

In the regional acute hospital as a centre of excellence in medical innovation.

$26m

Establishment of NW Medical School.

**We offer financial incentives. Our business support partners can offer your company an attractive and competitive package of financial incentives, recruitment/training advice and help with R&D costs.**
Business incubation & co-working space

COLAB
- Located in the Letterkenny Institute of Technology (LYIT).
- Incubation space and business support to early-stage enterprises in the high tech and knowledge intensive sectors.
- Provides flexibility for start-ups and companies of any size, ranging from a single “hot desk” to large-scale workspace.
- Cross Border engagement with Catalyst Inc. Innovation Centre.

Catalyst Inc. Innovation Centre
- 50,000 square foot of flexible workspace on the banks of the River Foyle.
- Has its own Data Centre.
- Houses specialists in software, telecoms, digital media, health & bioscience, clean tech and television production.
- Super-connected premises provide flexibility for start-ups and companies of any size.
- Cross border engagement with CoLab.

Ulster Science & Technology Park
- Purpose built 15 acre mature landscaped campus.
- Home to its own Data Centre.
- Houses specialists in software, telecoms, digital media, health & bioscience, clean tech and television production.
- Super-connected premises provide flexibility for start-ups and companies of any size.
- Cross border engagement with CoLab.
Ireland Northwest price comparisons with other cities

<table>
<thead>
<tr>
<th>City</th>
<th>Restaurant Prices</th>
<th>Average Grocery Shop</th>
<th>Average Rent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dublin</td>
<td>28.5%</td>
<td>26.1%</td>
<td>208.9%</td>
</tr>
<tr>
<td>Belfast</td>
<td>1.5%</td>
<td>10%</td>
<td>27.7%</td>
</tr>
<tr>
<td>London</td>
<td>39%</td>
<td>16.6%</td>
<td>316%</td>
</tr>
</tbody>
</table>

**Average House Price:** $147,660

---

**Quality of Life**

Ireland Northwest boasts an enviable quality of life with access to:

- Free healthcare & 2 acute hospitals
- Available and affordable housing
- Stress free commuting
- Strong sense of culture, heritage and community
- Stunning scenery and historical landmarks
- Award winning beaches

The region is home to a rich tapestry of culture, arts and language. Its thriving arts and culture scene has established global reputation. The area has a rich built environment and natural landscape. A foodie destination with some of Irelands best and award winning restaurants, a rich musical legacy the city region has been designated as a port for the Clipper Round the World Yacht Race. Events are a strong point include Jazz Festival, Enagel Arts Festivals and Irish Open, recently voted the Best Halloween destination in the world by USA. The world famous coastline and unspoilt environment promotes a wealth of leisure activities within easy access allowing for a healthy work life balance. Voted No.1 Halloween Destination in the world by USA Today.

---

“Donegal is the coolest place on the planet”

National Geographic, The Cool List

---

**RESTAURANT PRICES AVERAGE GROCERY SHOP AVERAGE RENT**
Dedicated business development & investment team

We work in partnership with Investment attraction agencies, educational institutions, Local Government and Chambers of Commerce in two different national jurisdictions and have collaborated on a number of successful projects. With our dedicated Business Development and Investment team we provide Support for Companies in:

> Talent Management & Recruitment
> Property Solutions
> Bespoke Skills & training programmes
> Civic support through executive offices of local government
> Investor Forum
> Business Ambassador & Conference attraction programme.

INTERESTED IN OUR OPPORTUNITIES? WE WANT TO TALK TO YOU.

Derry City & Strabane District Council

📞 www.investderrystrabane.com
✉️ investment@derrystrabane.com
📞 +44 (0) 28 71253253 ext 6661/6662
('@InvestDCSDC

Donegal County Council

📞 www.localenterprise.ie/Donegal
✉️ info@leo.donegalcoco.ie
📞 +353 (0) 74 9160735/9153900
('@donegalcouncil