Local Economic Factors

Labour Market

A snap-shot of the labour market reveals that;

- the gap in educational attainment between school leavers with no formal qualifications and those educated to third level continues to widen;
- the unemployment level has dropped to 5.41%[20] however there is still a dependency culture on government benefits. Access to jobs by traditional means is often difficult for those marginalised and the need for an activated social economy is greater than before; and
- more people are prepared to travel further for work on the basis that where they live should provide a quality of life experience rather than where they work. Large numbers of people (53%)[21] are currently commuting to work in the city from neighbouring districts.

Inward Investment

Traditional inward investment is flat globally however growth is being experienced in new industries associated with knowledge and creativity. Increasingly city centre locations are being sought to locate these industries. Quality of life is a major consideration for much of this investment. Therefore Belfast must be able to compete with the many cities that have already taken up the challenge.

Local Indigenous Businesses

The majority of people employed work for local indigenous businesses. These businesses struggle to find appropriate locations and property. The numerous Local Enterprise Centres that provide support are largely full and have low turnover rates. This in turn creates problems for businesses that often need property ready to operate from. A shortage of such premises is currently evident throughout the city. As a result of the analysis in the Shankill and West Belfast Employment Task Force Reports, Invest Northern Ireland is to consider a pilot 'industrial co-ownership' initiative in inner city areas of Belfast in which existing tenants of local enterprise agencies will be encouraged to move into owned premises, but in a context in which the capital costs will be shared with the development agencies. Land however is in no shortage especially within the fracture zones that exist around the inner city and adjacent to surrounding neighbourhoods.

Retail

Current retail and office policy has created inappropriate out of town opportunities at the expense of the city centre. Delays in decision making e.g. A M Development /Victoria Square, have reinforced a negative perception to future investors. In the future development procedures must maximise the opportunity presented in such schemes.

Social appraisal

Belfast covers 11,489 hectares and is home to a resident population of 277,391 (16% of NI's population). Approximately two thirds of the population of Northern Ireland live within a 50 kilometre radius of the city.

The population has fallen by 5.4% since 1991. Belfast City Council was the only District Council area not to experience growth in the last ten years. Although the population in neighbouring council areas rose significantly e.g. Carrickfergus by 13.8% and Castlereagh by 8.2%.

In addition Belfast exhibits a youthful population with approximately a fifth below 16 years and a higher than average 20 to 24 year old age group. A youthful population has implications for education, training and jobs.

Catholics (42% up) and Protestants (40% static) who make up the remainder of the population generally live in highly segregated areas. Ethnic minorities comprise less than 1% of the total population.

According to the Noble Report, Belfast contains the worst ten deprived wards in terms of health.

New living arrangements require smaller household size due to the growth in elderly population, marital separations which adds to a greater demand for an increased number of homes.

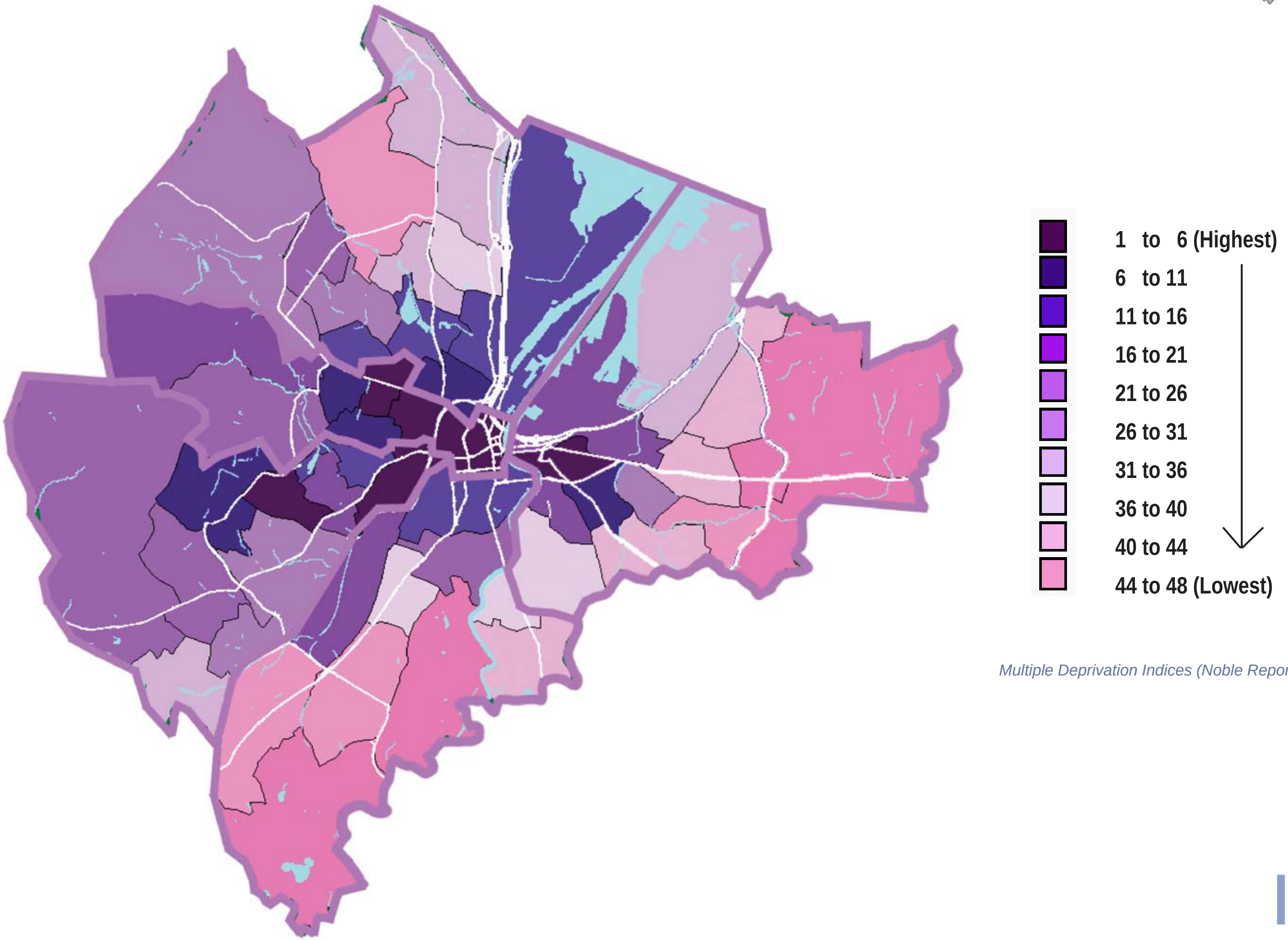
Belfast is a divided and polarised society. A recent report entitled "measuring and visualising labour market and community segregation in Belfast "[22] makes two key recommendations;

1. *There is a need for a policy approach which recognises indigenous employment needs within deprived areas and also seeks to connect local people to job opportunities and efficiently; and*
2. *A safer and less expensive public transport system would not only connect deprived area to places of employment growth but also to other services such as shopping and leisure facilities.*

Opportunities exist for policy makers to promote; greater community integration by facilitating the removal of existing physical barriers between communities, conditional upon local agreement. Land designation, the location of employment and investment decisions on social, economic and physical infrastructure must respect the sensitivities of the divided and polarised nature of the community, while seeking to contribute to the healing of community divisions.

The "Shirlow et al" study evidence strongly suggests that people from segregated and deprived areas will work together if workplaces are located within neutral spaces. Particularly so if they can locate a workplace without having to enter a place "dominated" by the other religion. Therefore locating workspaces between adjacent communities stimulates greater mixing. The location of employment, in sectarian terms, is more important than the frictional effects of distance.

Belfast Wards - Rank of Multiple Deprivation



Multiple Deprivation Indices (Noble Report)

New Targeting Social Need (TSN)

The Northern Ireland Government is committed to tackling social exclusion by targeting efforts and available resources towards people and areas defined as being “in social need”. It requires existing and new spending programmes to identify and effectively address deprivation. The Masterplan aims to facilitate this through its development framework and focused effort in these multiple deprivation areas. It will deliver promotion of equality of opportunity, good relations between people of different religious belief and political opinion or racial group.

Role of the Social Economy

The social economy is an important component of the development dynamic in Belfast. The social economy (or third sector) lies between the roles of the private and public sector and has an important role to play in economic development, social inclusion and the provision of services to local communities. Northern Ireland has taken the lead in the development of social economy policies in the UK and has established a formal Social Economy Forum chaired by the Minister for Enterprise, Trade and Investment.

The social economy consists of a number of social enterprises which undertake economic activity for social, community or philanthropic purposes. They seek to provide services to their communities and to make profits which can be re-invested in the further development of their communities. The ownership structure of social economy organisations ensures that the benefits of the business activities undertaken are re-invested in the local community - most social economy organisations are structured as companies limited by guarantee. Social economy organisations are very diverse, ranging from credit unions, to housing associations, local enterprise agencies and the trading arms of voluntary and community organisations.

There is no easy way to measure the social and economic contribution of the social economy - an issue being addressed by a number of researchers. However, in other urban areas of the UK where detailed social economy impact studies have been undertaken, the social economy has been found to account for between 6 and 8% of total employment. In Belfast that would imply that it accounts for between 6,000 and 8,000 jobs. More significantly, surveys have found that the employment provided by the social economy is heavily concentrated in areas of greatest disadvantage, is taken up by those who are disadvantaged and provides a pathway to mainstream employment for many people.[23]

The Reports of the Shankill and West Belfast Employment Task Forces both argued that greater emphasis should be given to development of the social economy in Belfast and that social economy delivery of services to local communities should be given priority. In particular, detailed proposals are being implemented now which will enable social economy organisations to offer intermediate labour market (ILM) employment opportunities to those in inner city areas who find it difficult to access conventional employment opportunities without significant training and other support interventions.

Physical Appraisal

Planning and Environment City Wide

Before moving forward to look closer at the spatial dynamics of Belfast, and how these can be read in the context of the preceding economic analysis, the masterplan needs to review the state of the city and examine the physical inhibitors to performance and investment.

The city of Belfast is emerging from one of the most turbulent periods in its post-industrial history. Not only does the city carry the scars of its changing economic fortunes over this period, it also continues to live with the physical consequences of decades of intense community division and sectarian conflict. Notwithstanding all of this, some parts of the city have faired better than others but overall the city, given its relative status as a European regional capital, exhibits a fairly mediocre if not in parts a distinctly poor urban quality.

The city as a product is very poorly presented. Arrivals by road, rail and air are marked by poor visual first impressions. The primary arrival corridors are completely absent of public art, are dominated by heavy engineering (primarily roads) solutions and present almost expected images of poor and depressed urban fabric. The gateways through which one enters the city centre and the city neighbourhoods, from these arrival corridors are no better. The Broadway roundabout on the city's southern entrance has an electricity pylon in the centre of it. The Grosvenor Road gateway to the city centre is marked by fly posting and advertising hoardings and the entire Westlink corridor is devoid of public art at any of its interchanges or gateways (which is surprising given the strength of the artistic community within the city). The same can be said of the eastern approaches on the Sydenham Bypass from the City Airport and the very uncertain pedestrian route to the city centre from Central Station.

Under-investment within a number of city neighbourhoods is striking and the perception of Belfast as a dangerous place is strengthened by the visual impact of sectarian emblems and dirty streets leaving the impression of too many no-go areas for the uninitiated, despite the efforts of the Housing Executive to renew the housing stock within the poorest parts of the city. The arterial routes that serve many of these locations, are congested and appear to be viewed more as transit corridors than the focus of community life in certain areas. Interface and territorial issues, heavily influence movement and linkages between communities and places of employment.

The quality of contemporary architecture across the city is generally poor. For a city of its size and considerable built heritage, it has very few modern iconic buildings of international design quality. This is a strong indicator of the absence of business confidence in the city and of the dominance of the public sector in the office market driving down rental rates and hence built quality. The city's built environment is still largely dominated by its stock of historical buildings and landmarks. The design agenda for Belfast both in terms of its architecture and public realm, but also in relation to its cultural and artistic expression is an area that needs to be given status as part of the quality agenda for the city.

Notwithstanding this overall impression, there has been considerable progress made by the private sector in the city in lifting the quality of the urban environment. There have been bold investments in the evening economy which have helped the city centre develop a much more vibrant and secure profile. Confidence has been demonstrated in reviving city centre living through a strong investment in apartments and mixed use residential development and in the hotel and hospitality sector. These commercial ventures indicate that a design agenda is emerging for buidings and spaces throughout the city. This confidence is encouraging and must be supported by continuing investment in the public realm.

The natural environment remains a similarly under-developed resource. The River Lagan is still not the focus of attention it should be, and there is potential to develop the Connswater and Blackstaff corridors as important amenity features. The dramatic Belfast Hills remain an untapped resource and have a significant potential to contribute to the tourist product of Belfast. Air quality across the city is also an issue and is worst in pockets that lie along the main transport corridors.

One of the more striking aspects of the physical planning of Belfast is the apparent abundance of vacant or brownfield land that exists within and adjacent to its city core through areas or dislocation and underinvestment. Surface car parking and gap sites in the city centre area alone account for some 33 hectares of under-utilised space. Add to this extensive reserves at the former Sirocco Works (6.5 ha), Titanic Quarter (80 ha), land between the lower Newtownards Road and the Sydenham bypass and pockets within the Harbour Estate north and south of the river, and the figures amount to approximately 100-120 hectares within the central area of the city. This volume of development opportunity land is a major challenge to the spatial planning of the city and will require an agreed approach to be adopted on phasing, release and implementation. On the one hand it offers an opportunity to build the city from within and to achieve major returns on the brownfield quota for the city. On the other hand, if not adequately addressed, it could represent a threat to the ordered and focused regeneration of the city core.

Physical Environment: Negative Drivers

Middle City *(Area between city centre and adjacent neighbourhoods)*	**City Centre**	**City Presentation**
▪ Years of neglect and under-investment in specific areas	▪ Road dominance	▪ Arrivals by road and rail
▪ Absence of targeted regeneration strategy	▪ Retail Product	▪ Dominance of roads infrastructure/ Severance
▪ Poor linkages to employment and training locations and city centre	▪ Works in pockets, not as a whole	▪ Sectarian emblems and signage
▪ Poor urban townscape	▪ Lack of iconic attractions	▪ Under -investment/Dirty streets
▪ Interface blight	▪ Nigh-time inactivity	▪ Quality of modern architecture
▪ Accessibility and traffic management	▪ Poor links to Laganside	▪ Lack of cohesion- buildings and spaces
▪ Litter and upkeep of public spaces	▪ Lack of town centre housing	▪ Lagan- still a barrier not a focus
▪ Emblems and signage	▪ Shatter-zones to the west	▪ Perception as a dangerous place.
▪ Perceptions of damage	▪ Poor public realm	
	▪ Outdated transport connections	

Transport and Movement Appraisal

In terms of transport infrastructure, the car is "king" in Belfast despite the city having the lowest level of car ownership of any of its comparable UK cities. The dominance of roads infrastructure has had a major effect on the quality of the physical environment of the city, creating areas of severance most notably to the west and east of the core. Projected population growth will exacerbate the car dependency problem further.

Within the central city four lane highways are commonplace in all directions. These roads are well below capacity except for peak hours, making the city centre a difficult place to walk or cycle. In terms of public transport the city is behind its comparators in the debate on rapid transit, heavy rail, bus services and other sustainable modes of travel. This deficit affects the economic performance of the city, inhibits the mobility of the labour force and negatively impacts on the attractiveness of the city in terms of quality of life indicators that play a major role in investment decisions.

Since the M1 Westlink was built, removing north to south through traffic from Belfast City Centre, the residual city centre road network now appears over designed. On entering the city centre there is an immediate impression that a disproportionate amount of space is allocated to private vehicles compared to other modes.

The image of four or more lane roads carrying little traffic is a common sight during inter peak hours, while observations and statistics suggest that most of the highway infrastructure operates well within capacity even at peak times. For the pedestrian, the negative impacts of this are considerable. Those travelling west or north from the city suffer considerable severance due to the old network which runs along the inside of the M1 Westlink, while those wishing to access the waterfront to the east must tackle two major roads. Although facilities to cross these highways exist, priority lies with the motorist.

While it would be unreasonable to expect heavy rail to cater for Belfast's urban travel demand, it is essential that it serve the longer trip market providing an attractive alternative to the car. Whilst quality rolling stock serves the main line to Dublin the service frequency is half what may be expected when compared to services in comparative cities. On arrival in Belfast, both stations are slightly detached from the central core, particularly in the case of Central Station, and neither offers the sense of arrival, or the onward transport opportunities that exist in cities like Newcastle or Edinburgh.

With the exception of a few trips undertaken by rail, the public transport provision serving the Belfast urban area consists of black taxis and buses. The black taxi service provides a relatively inexpensive form of public transport in the western and northern corridors, whilst the bus service throughout the city is ineffective. An aged fleet, poor and irregular service frequencies, and lack of cross-city or radial routes, results in the bus being a mode of necessity not choice. The token and ineffective provision for bus priority sums up the attitude to public transport within the city.

Under the current proposals evolving through the BMTP, even though a variety of initiatives including park and ride, quality bus corridors and rapid transit are being considered, there remains a sense of the 'do minimum' approach in public transport planning. With all proposed measures implemented, BMTP estimates a 3% reduction in car use in the centre city by 2020 will be achieved. This appears to be a very low return for such a significant investment, particularly in a city where 46% of its population do not have access to a car. The target for a similar transportation strategy in Edinburgh is 30%.

Belfast City Council Transport Policy 2001

"Cities can not exist without movement. They develop on the back of large inflows and outflows of people, goods and the vehicles that carry them".

(Richard Rogers, Urban Taskforce Report).

The aim of the City Council's transport policy is to provide a consistent approach to ensure that the city continues to develop and prosper in a sustainable manner and avoids the potential problems that unconstrained traffic growth could bring. As a means of addressing many of the issues above it contains a number of policy measures aimed at addressing the following:

- An increase in long distance commuting travel patterns into Belfast, 66% of which are by car
- Traffic congestion at peak hours
- 46% of households in Belfast have no access to a car
- Car ownership is growing twice as fast as the rest of the UK
- Growth of traffic levels has an impact on localised air pollution
- Historic under-investment in the rail network
- Bus priority is still too low but improvements have taken place
- Black Taxi use in North and West Belfast operates like a bus service
- Provision of cheap and plentiful car parking spaces in the centre city
- Neighbourhood "rat-running" is becoming an issue
- Inheritance of car orientated transport policies "Car is king"
- Need for transport vision rather than piecemeal approach
- Lack of funding for sustainable transport initiatives

The strategic objectives that underly the policy are based on the five principles of prosperity, social inclusion, safety & security, sustainability and health. Against these headings are a range of policy measures addressing such issues as road user charges, land use planning, provision of cycling, public transport, development of Home Zones etc. These policies are valuable in informing the debate on the BMTP and are complimentary to the spatial planning strategy of this masterplan.

Resolving Uncertainties in the Transport Strategy

The Regional Transportation Strategy (RTS) sets out the transport elements (to 2012) of the Regional Development Strategy (RDS) which in turn provides the spatial development framework up to 2025. The RTS considers transport issues in Northern Ireland under 4 spatial headings, one of which is the Belfast Metropolitan Area. The Belfast Metropolitan Area Plan (BMAP) and the associated Belfast Metropolitan Transport Plan (BMTP) are currently being undertaken by the Department of Environment (DoE) and the Department for Regional Development (DRD) respectively. The BMTP sets out an emerging plan for the year 2015 and a Preferred Strategy for 10 years hence.

A complication of preparing the transport aspects of the Belfast Master Plan (BMP) is the difficulty of integration with the emerging Belfast Metropolitan Transport Plan (BMTP). This strategy itself requires to be incorporated with the Belfast Metropolitan Area Plan (BMAP), which in turn is yet to be completed.

These uncertainties are not fundemental to the process of preparing the transport aspects of the BMP since all these plans are essentially strategic in nature and none of their various authors claims a monopoly of wisdom in such plan preparation. Indeed all are ready to discuss and debate the key issues in order to achieve a coherent and cost effective strategy.

Despite this harmony over the general approach to the formulation of the transport aspects of the Belfast Masterplan, there will inevitably be differences that have to be resolved and choices which have to be justified. On this matter the consultants would suggest a slight departure from the DRD approach of following the extensive advice of GOMMMS. This advice was designed for the UK government's Multi-Modal studies, most of which were concerned with Trunk Road corridors where highway proposals had proved contentious. GOMMMS advice regarding the evaluation of schemes and strategies was itself based on the overlapping and somewhat confused transport objectives set out in the 1998 Transport White Paper.

In relation to the BMP the consultants would favour simplifying the transport objectives to:

- Increase accessibility in terms of reducing journey times and costs
- Reduce accidents
- Improve the environment
- Achieve the equivalent for freight
- Be progressive and contribute to the breakdown of sectarian divides
- Contribute to the BMP planning objectives and in particular to the opening up of new development areas
- Achieve all this at a minimum cost to the public purse

These seven objectives do not contain the over-worked word "integrated". This is deliberate since integration is really a policy rather than an objective and there is little value in adopting an integrated approach to transport problems unless doing so achieves one or more of the objectives listed. An integrated station car park or bus interchange is not of value if no one uses it. Inclusion of integration as an objective therefore merely adds confusion of the sort evident in GOMMMS.

Achievement of the seven objectives provides a sound basis for assessing the likely contribution of particular transport policies to the BMP and hence to decisions as to which policies should be included. In making such judgements many policies can and should be assessed in financial terms either as costs (e.g. capital investments) or benefits (e.g. time savings or accident reductions expressed in monetary figures). Where this is possible the GOMMMS advice is very helpful and should be followed. Where such evaluation is not possible, for example in assessing environmental impacts, it is proposed the effects should be quantified as far as possible and then judged against the monetary figures summarising other aspects of the schemes or policies.

This it is considered should be the way in which the component transport policies should be assessed in terms of their contribution to BMP and hence their importance as part of BMP. It is the way in which any emerging differences between BMP and BMTP should in due course be resolved. The adoption of such a procedure is important not only to resolve any differences but also to ensure that the BMP and BMTP are as cost-effective and integrated as possible and do not contain wasteful or ineffective policies, one alone of which (for example slack parking control or an extravagant, but unjustifiable new public transport system) can seriously undermine a whole transport strategy.

Addressing the Planning Objectives

Both the BMAP and Belfast Masterplan are development plans with important planning objectives. Transport investment may be essential to the achievement of some of these objectives even though it may itself appear to be of doubtful value as a transport investment. For example a new access road to a development site may be expensive but carry little traffic, yet without it a whole development strategy may be impossible. Some elements of the transport strategy may thus be justifiable in planning terms alone with the onus being placed on the planners to justify this rather than an alternative site or plan.

Performance of BMTP Draft Preferred Strategy for 2025

An indication of the performance of the Draft Preferred BMTP Strategy for 2025 was provided in the BMTP conference paper, February 2003. No such information was provided for the 2015 Emerging Plan. Compared to the do-minimum, or without strategy scenario, it is forecast that introduction of the BMTP will reduce the number of car trips in the Metropolitan Area by 3% to 4% in 2025, with an associated increase in public transport trips of 30%.

Whilst more information is required to comment fully on the performance of the Strategy (for example, what is the reduction in car usage in Belfast City alone? Were any traffic management measures included in the do-something scenario?) a 3% to 4% reduction in private car based trips seems a modest goal and a minimal benefit from such a considerable investment in infrastructure. Compared to other cities the target set in Edinburgh for example is to reduce traffic levels by 30% by the year 2010.

Opening up the Titanic Quarter

The opening up and redevelopment of the Titanic Quarter is perhaps the largest and most striking planning objective in the BMP. Its omission as yet from BMAP is perhaps the largest discrepancy between the two plans and one which will need early resolution.

In planning terms the Titanic Quarter offers an opportunity to introduce a major new tranche of population, jobs and economic activity adjacent to the city centre. This will not only help to revitalise the city centre itself, it will also redevelop the largest "brownfield site" in Belfast and reduce the pressure for other more remote developments.

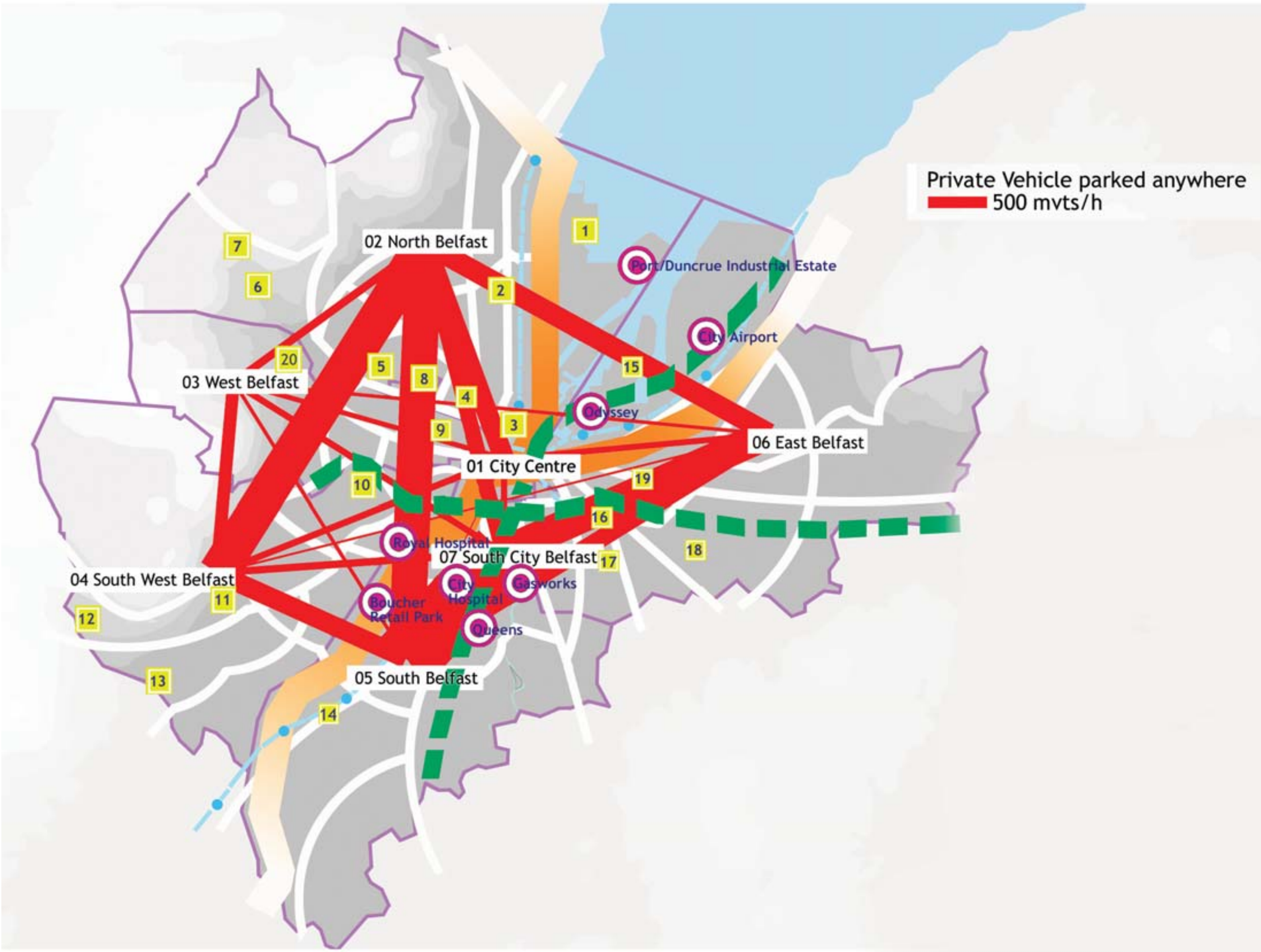
In transport terms the opening up of the Titanic Quarter presents particular challenges and opportunities. Its location, adjacent to the city centre, offers the opportunity to minimise reliance on the private car for travel to work and comparison shopping. Its design and layout offer the opportunity to create a new and sustainable development in which car ownership may be held at a low level, new forms of public transport may be introduced and ideas such as car-pooling may be experimented with. All these opportunities are in addition to the planning opportunities discussed elsewhere in the document.

Organisation of Public Transport in Belfast

It seems that both Ulsterbus and Citybus are poor relations to Northern Ireland Railways are very hungry of both finances and management time. (Note that at the creation of Translink, it was a deliberate policy that nearly all individual managers would combine both rail and bus roles.)

Greater Belfast would be served better if public transport in the city were the responsibility of a separate organisation, with no other transport responsibilities to distract it from the job in hand. Such a body could be responsible to the City Council itself, or a joint board of the six councils covering the Metropolitan Area. Providing or procuring bus services should be the main job of this organisation, along with LRT if appropriate. It should also have powers of co-ordination in respect of suburban rail services.

City Movement Analysis (by car) and BMTP Rapid Transit Corridors



Existing private car demand and proposed BMTP RT Corridors

- Existing Private Car Demand
- BMTP RT Corridors
- Economic Drivers
- Economic/Employment/Neighbourhood Development Opportunities

1. Northforeshore
2. Shore Rd/York Street
3. Great Patrick St /Gamble St /Dunbar Link
4. Crumlin Rd Gaot & Courthouse complex
5. Brookfield/Rosemount Mill, Crumlin Rd
6. Ballysillan Industrial Estate
7. Hicks / Bullick Site, Ligonell
8. Hillview enterprise park
9. Ballygomartin Industrial Estate
10. Springvale/Mackies
11. Former St. Patrick Site, Monagh By-Pass
12. Glen Road Industrial Estate, Hannahstown
13. Suffolk Rd, Former Hill
14. Stockmans Lane
15. Titanic Quarter
16. Ravenhill Road
17. Ravenhill Rd, Ravenhill Ave, London Road
18. Castlereagh Mill, Creagh Road
19. Connswater
20. Ballygomartin Indust. Estate

This diagram gives an indication of how people at present move around Belfast using their cars (red bands) and correlates this with the proposed rapid transit corridors suggested in the BMTP. There are clearly strong movement corridors that to date have not received a significant public transport response – north to south Belfast crossing the city centre, south west Belfast to north Belfast on a western route, and east Belfast to south Belfast.

Whether this body should actually run the bus services itself is another matter. The preference would be for a franchising arrangement, with perhaps three geographical franchises covering the city. The franchises should have a certain amount of freedom in determining their own routes and timetables subject to a minimum threshold determined by the procuring body.

Transport Commentary – Appendix 2

The transport aspects of the masterplan must address a wide range of initiatives that will inevitably require extensive further investigation and research as part of the ongoing BMTP/BMAP debate. Parking, QBC's and the bus network, black taxi's, park and ride, the rail network, additions to the highway network etc are critically important elements which the masterplan must consider. Appendix 2 contains a commentary on these aspects as they relate to the debate on the integration of the masterplan with emerging thinking on the BMTP. The themes contained in this commentary are followed through in the physical strategy where they can be addressed, by the masterplan. Otherwise they are there to inform the next review of the City Councils Transport Policy and influence the debate on how these issues might be tackled by other stakeholders and lead agencies.

Existing City Movement Analysis

Transport Commentary – Appendix 2

- Existing City Movement Analysis
- The Rail Network
  - Conversion to light rail
  - The potential for new rail technology
  - The LRT/E-Way Proposals
- Ultra
- QBC's and the Bus Network
- Parking Policy and Highway Capacity
- Reclaiming road space
- City centre circulation
- Expanding the Highway Network
- The Black Taxis
- Park and Ride

An assessment of the BMTP 2001 base year travel demand was undertaken in order to identify the transport needs of Belfast City. Trip patterns are shown on page 34 for private vehicles (left) and public transport person trips (right) for trips both originating and terminating in Belfast City only. The public transport trips include those made by black taxis.

Of the 30,000 car trips taking place within Belfast City during the AM peak hour, the main origin-destination pairs were found to be between:

- South Belfast and South City Centre (13% or 3,900 2-way trips)
- Internal to East Belfast, 12% or 3,700 2-way trips)
- North Belfast and South West Belfast (8% or 2,200 2-way trips)
- North Belfast and South Belfast (7% or 2,100 2-way trips)

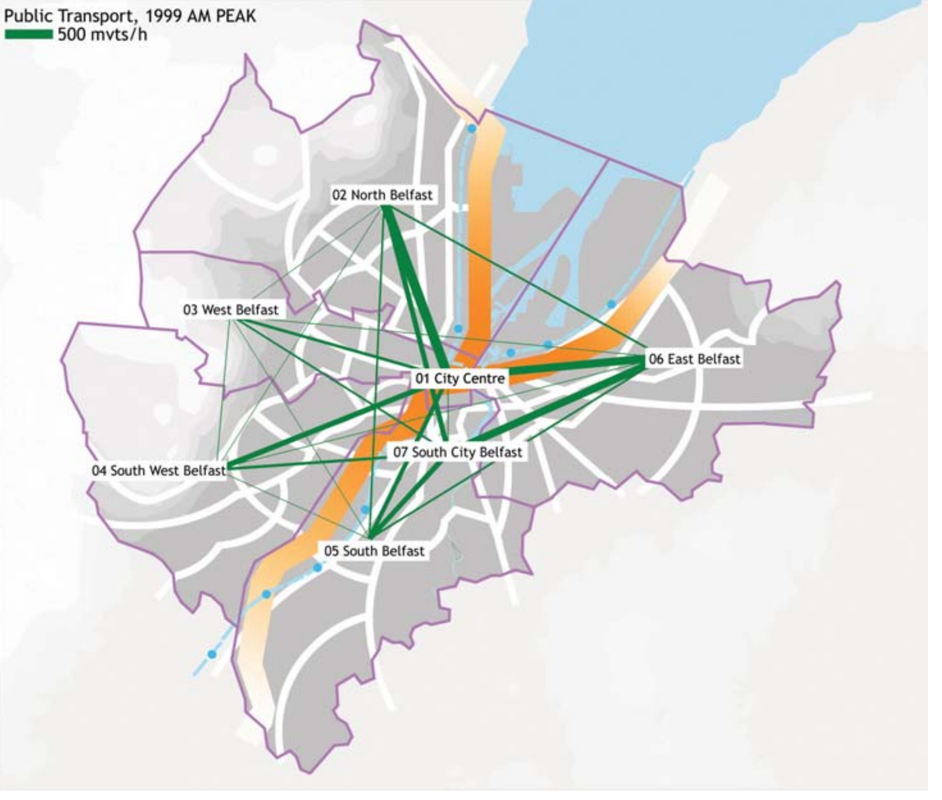
Similarly, of the 6,300 public transport trips (buses and black taxis) undertaken during the AM peak hour, the major trip patterns were found to be between:

- North Belfast and the City Centre (12% or 800 2-way trips)
- East Belfast and the City Centre (10% or 600 2-way trips)
- South City Centre and East Belfast (10% or 600 2-way trips)
- South West Belfast and South West Belfast (ie or internal to South West Belfast, 8% or 500 2-way trips)

The simple analysis of base 2001 travel patterns indicates the following:

Private Vehicle Movement

Public Transport Movement



- There is demand for a quality public transport provision between South Belfast and the South Social appraisal which corresponds with the Super Route Rapid Transit corridor, and between East Belfast and the South City Centre which corresponds with the EWAY corridor.
- There is little demand for travel between West or South West Belfast and the City Centre. The public transport trips that are currently made between South West Belfast and the City Centre are predominantly made by black taxi. Based on 2001 travel patterns the figures suggest that unless travel patterns change dramatically in the future the WWAY Rapid Transit proposal would be difficult to justify on these grounds alone. However on regeneration potential, the case may be stronger.
- There is a reasonable demand for travel between North Belfast and the City Centre although no Rapid Transit Route is proposed on this corridor.
- There is significant demand for a cross city public transport route linking North Belfast and South Belfast and other cross routes. There is very little existing cross route public transport demand due to services terminating in the city centre.
- There appears to be considerable demand for an orbital public transport route linking South Belfast - South West Belfast - North Belfast - East Belfast. Again there is no existing orbital public transport demand due to lack of service.

Footnotes

[1 & 2] 2001 Census

[3 & 4] Belfast City Centre Healthcheak and Benchmarking 2002 - Belfast City Centre Management

[5] Report reference - NUTS research

[6 & 7] DETI Census of Employment 2001

[8] NITB website

[9] 2001 Census

[10] Residential Property Magazine, July 2003

[11] The results of the 2001 Census showed that previous estimates of the UK population were around one million too high. ONS has published interim revised national mid-year population estimates consistent with the 2001 Census for the 1991 Census. As there are no mid year estimates for 2001, the Census figures will be used instead.

[12] Compiled by the Consultant team on the basis of comparable UK data supplied by others. Note that NI regeneration programmes differ from those delivered in the rest of the UK, therefore the team has endeavoured to provide a most equitable match where possible.

[13] Belfast City Centre Healthcheck and Benchmarking Report, 2002

[14] Belfast City Centre Healthcheck and Benchmarking, 2002 – Belfast City Centre Management

[15] Verdict Research Survey, BCCM, 2002

[16] Aspects of the 2001 Census in the have been challenged bycertain major cities and in some cases the basis of data varies between Belfast and other U.K. Cities, however, any such differences are not likely to have any significant impact upon the comparisons made.

[17] Censuses of Employment 1995 -1999, DETI Statistics Research Branch

[18] Relocation of Government Consultation Document, DFP.

[19] Benchmarking Innovation Performance in Ireland's Three NUTS 2 Regions, October 2002 - InnovationLab, Northern Ireland Economic Research Centre.

[20] Census of Employment 2001

[21] Employment Bulletin, DEL

[22] Measuring and Visualising Labour Market and Community Segregation: A Pilot Study by Dr P Shirlow, Dr B Murtagh, Dr V Mesev and A Mc Mullan

[23] www.colinstutt.com/social - economy.htm

Drivers

Inhibitors

Chapter 4

Drivers & Inhibitors

Capital City Document

Belfast City Council launched an earlier document in 2003, entitled "Capital City - Development Agenda" which sets out the priorities for the Council's Development Department by reasserting the city's role as the powerhouse for Northern Ireland's economy. The document uses the "force-field analysis" as a useful tool to find solutions to complex problems.

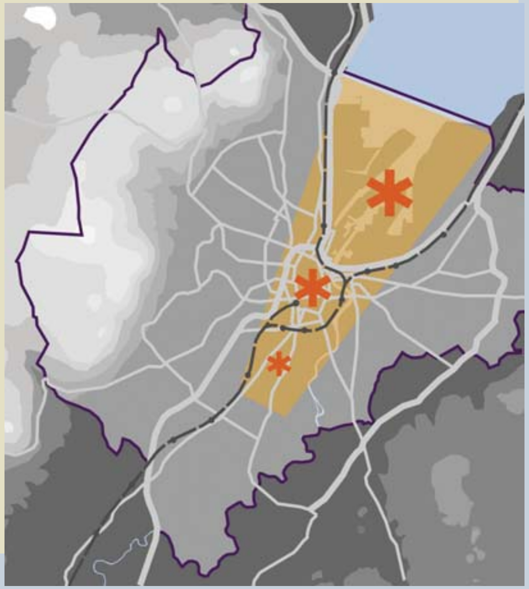
We have applied this approach to carrying out qualitative research with key stakeholders. Through this we have identified a number of drivers and inhibitors currently affecting Belfast and it's potential. This gives a solid platform on which to exploit the opportunities, which are many. These are explored in the next chapter.

Drivers

Governance	Market	Attitudes	Physical
■ Devolution ■ Increasing civic role of Belfast City Council ■ Strong Civic and other North America and Core Cities links ■ City Wide Partnership ■ Other Partnerships ■ Civic accountability ■ Reform of Local Government ■ Programme for Government	■ A young, educated and willing workforce ■ Sectoral strengths in Universities and Health Services (world class) ■ Bright young companies and wealth of creative skills ■ A workforce suited to knowledge-based industries ■ A.M Development retail catalyst ■ Site availability (serviced) ■ Office Sector ■ Port ■ Airport	■ Beginning of a city centre with buzz ■ Belfast City Council World Trade Centre/A M Development shared license ■ Core City learning Best Practice ■ Desire for change ■ More dynamic organisations	■ Titanic Quarter opportunity ■ Quality of Life ■ Role of river/environment assets ■ Northern Ireland Science Park ability to employ 4000 over 10 year period (knowledge based industries) ■ Arterial routes ■ Setting of the City Lagan

Inhibitors

Governance	Market	Attitudes	Physical	Social
▪ Competing and confusing number of bodies with no common vision for Belfast; ▪ Uncertainty regarding roles of Laganside Corporation and Belfast Local Strategy Partnership once funding depleted; ▪ Gap in physical regeneration function at strategic level - equivalent of Regional Development Agencies in UK. Falls between INI and DSD; ▪ Central government lack commitment culture; ▪ Uncertainty over timescale and consistency of decision making in planning process; ▪ Ineffective town centre management due to competing interests; ▪ Absence of business support structure; ▪ Absence of knowledge industries development forum; and ▪ Assembly stability issue.	▪ Lack of development phasing approach leads to market suppression; ▪ Low rents and oversupply of office space; ▪ Lack factory/workspace accommodation for local indigenous business; ▪ Mismatch of investment land versus locational needs; ▪ Sectarian labour market boundaries reinforce a disinclination to travel to work outside comfort zones; ▪ Polarised City; and ▪ Individual Sector appraisal.	▪ Perceptions of the Troubles; ▪ Lack of profiling success stories; ▪ Absence of Big Ideas; ▪ Suburban living versus city living for all; ▪ Mr Average; ▪ Avoidance of risk by public sector; and ▪ Benefit dependency culture.	▪ Lack of Brownfield in neutral areas ▪ Mismatch of residential land versus supply in North, West and East Belfast; ▪ Blighted land along the proposed Inner Ring Road; ▪ Lack linkages between city centre and neighbourhoods; ▪ Shatter/fracture zones between city centre and middle city neighbourhoods; ▪ Poor image, low quality design standards; ▪ Traffic congestion, subsidised car park spaces and dominance of roads infrastructure; ▪ Lack of public transport choice and investment; ▪ Lack of access to assets; ▪ Lack of integration of resources; and ▪ Lagan a barrier rather than a focus.	▪ Divided and polarised community; ▪ Benefit dependency culture; ▪ Difficult access to jobs; ▪ Social housing provision/demand; and ▪ Quality of life.



Grow the City

Develop the City Centre

Develop the New Industries

Provide Land for Employment, and

Simplify City Governance

Chapter 5

Masterplan Strategy

Masterplan Strategy

Having established the need for change and development in Belfast and carried out a detailed analysis of the competitive position of Belfast, this section sets out the recommended strategy. The strategy is based around economic, social and community imperatives, which are translated into 5 themed objectives for the spatial planning of the City as set out in chapter six.

The Economic Strategy

The imperatives are (priorities for change);

- Grow the City;
- Develop the City Centre;
- Develop the New Industries;
- Provide Land for Employment; and
- Simplify City Governance.

Grow the City

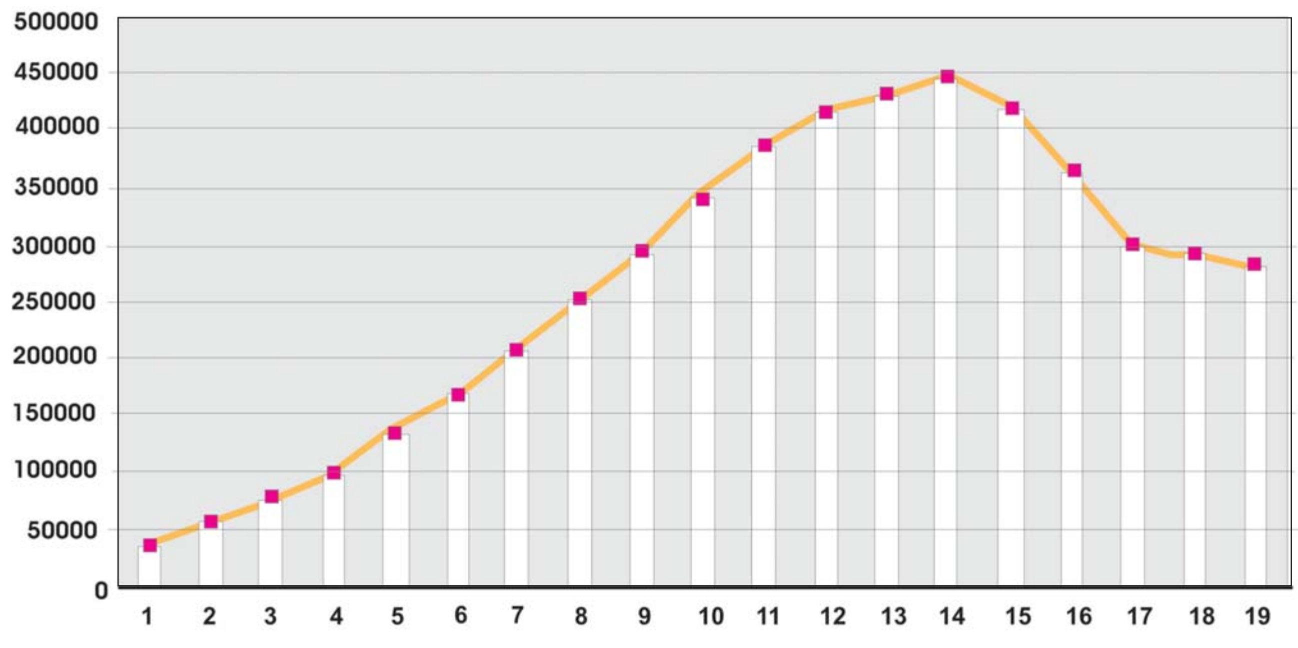
The growth or decline of the population of a city is a primary indicator of its economic and urban health. A growing city is one in which people have the opportunity and desire to live and work; conversely a declining city is one which people choose to leave either voluntarily or because of the absence of opportunities.

Belfast's population has fallen dramatically in recent years. In part this has reflected suburbanisation trends that have affected other cities, in part it was public policy to move people out of Belfast to other urban centres in Northern Ireland. However, a major contributor to Belfast's population decline was the impact of the Troubles on the City. This is reflected in the 25% fall in the City's population in the 1970s.

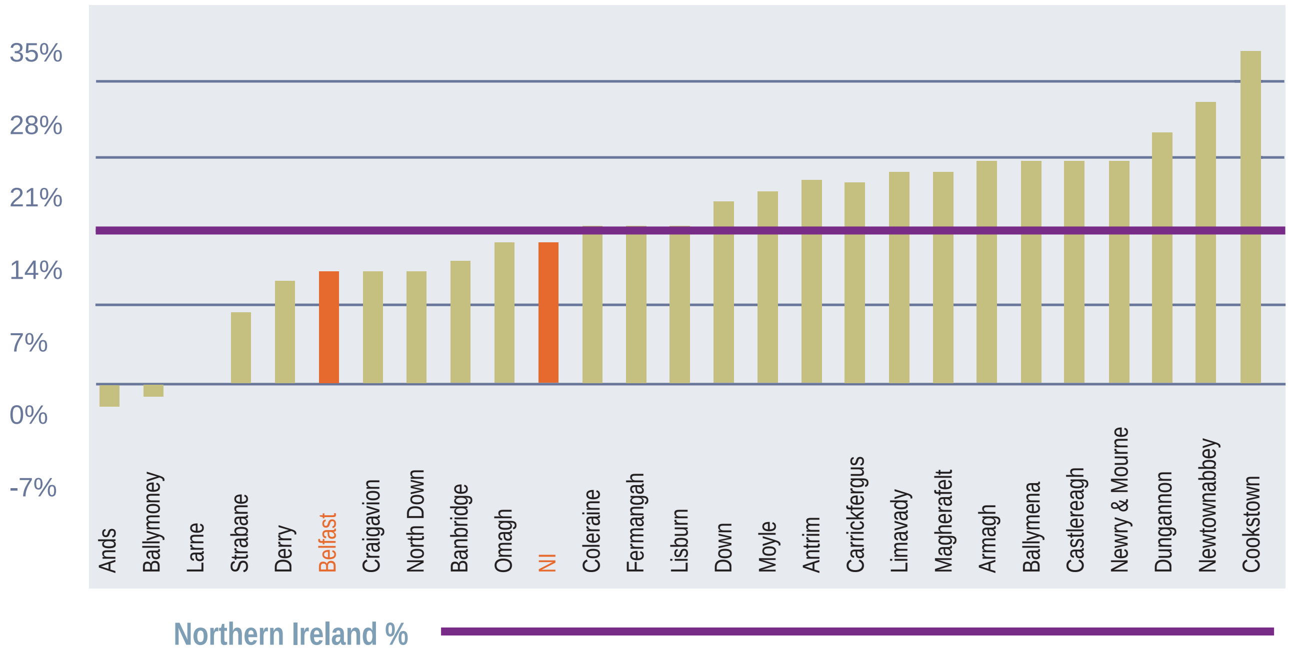
Northern Ireland's population is growing. The region now receives a net inflow of immigrants after decades of strong net emigration from Northern Ireland. This is a sign of regional economic health and greater political stability. However the City Council area when viewed against other District Council areas in terms of population change over the last ten years exhibits a contrasting continuing decline.

The major challenge facing Belfast is to reverse the 50 year spiral of decline, in particular the loss of population. Belfast requires to make itself an attractive and prosperous city in which to live and work. The measurement of success being to increase the City's population within its existing boundaries. Belfast City Council would require setting a stretching population target for the City, within its existing boundaries. The target suggested being to increase the population from 277,000 in 2001 to 400,000 in 2025.

Belfast Population Decline - by decade 1821 to 2001



Percentage Change for each District Council Area 1995-2001



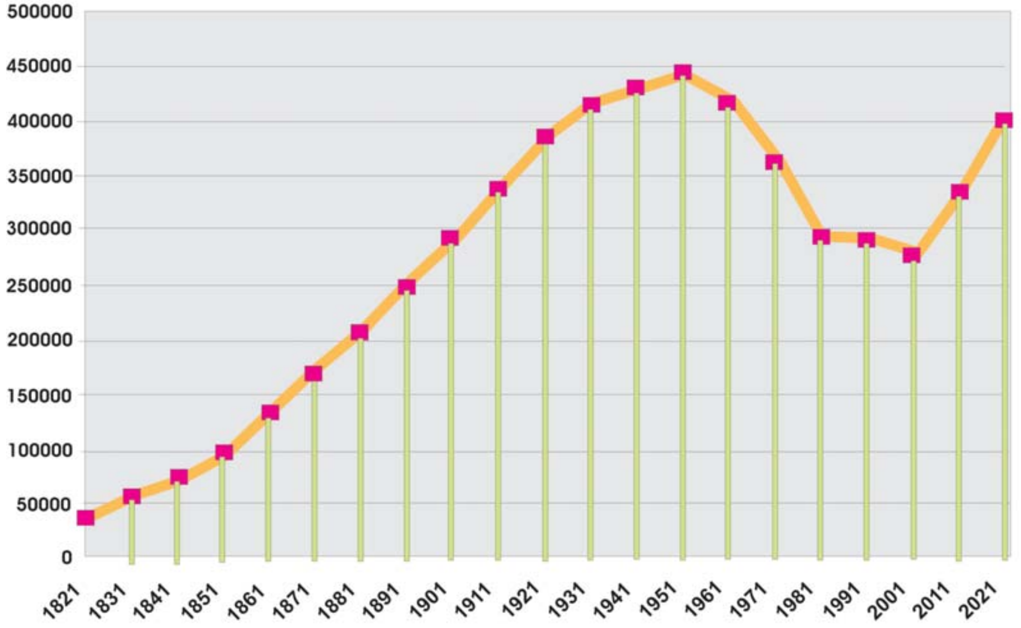
Achievement of this key target would require an average rate of growth of just less than 1.8% per annum over the period 2004 - 2025. This would represent an increase in the City's population of approximately 5,000 per annum at the start of the period rising to almost 7,000 per annum at the end of the period. This rate of growth has been achieved by many UK cities experiencing urban renaissance.

Achievement of this rate of growth would result in the intermediate year population figures shown in the adjoining chart. These figures would require to be monitored as a primary indicator of the urban health of the City. The following section explains how these population increase projections can be accommodated within the overall strategy. In essence they will require the development of Belfast as a more compact and sustainable city.

This would necessitate a higher proportion of people living and working in the City, a denser mode of development, much fuller use of city-centre living, an emphasis on the residential use of Titanic Quarter and other strategic sites and use of the very large amount of derelict or semi-derelict land for residential development.

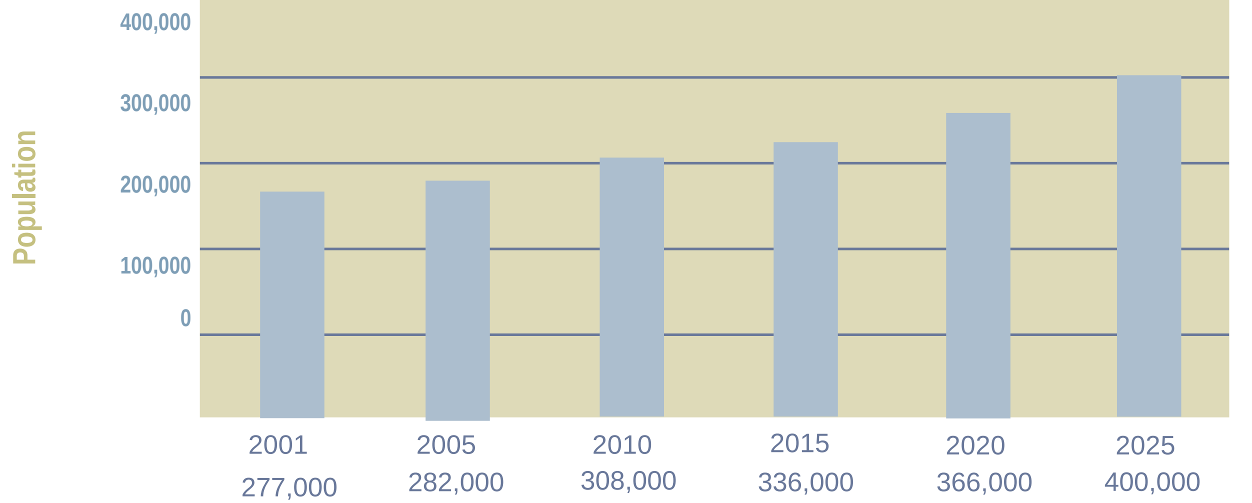
Such an approach needs to be balanced and sustainable, it needs to take into account the differing housing needs of single person households, households including young children and other household types, an appropriate mix of social and private housing and of other tenancy types. This will require the type of policy change and development which other European and UK cities have undertaken - for example to ensure that appropriate social housing is part of the city centre residential mix.

One of the sources for growth of the resident population is the large number of people who commute to work in the City. The latest data is taken from the 1991 Census of Population, (with traffic flows prepared by the Economics Branch of The Department for Employment and Learning). This showed that while 72% of those resident in Belfast worked in the City, less than half (47%) of those who worked in the City were resident in Belfast, with 53% of workers in the City travelling into it from other District Council areas. In 1991 the number of workers commuting from other District Council areas to work in Belfast was almost 78,000. This daily tidal flow of commuters accounts for much of the traffic congestion experienced in and around Belfast which could be much reduced if many were to migrate to the City were they could be served by sustainable public transport systems.



2021 Belfast Target Population

Indicative Future Population Targets for Belfast



Develop the City Centre

Belfast's City Centre is a key regional asset, but one which has declined in effectiveness in recent years.

Belfast City Centre is Northern Ireland's prime retail market but also contains key cultural, leisure and tourism facilities. The City Centre has an increasing residential population and is also Northern Ireland's main prestige office location. It is an area considered neutral between the communities, a place where both can meet, relax and do business. However, the role of the City Centre goes beyond these traditional functions.

Increasingly, vibrant city centres with a good quality of life are the locations sought for inward investment. In particular the fast moving knowledge-based and creative industries which are the key to future growth of export-led employment in Belfast. Indeed, many such investment decisions are taken on the basis of the ability of the investing firm to assemble a young, committed workforce in a central business area which is safe, accessible and cosmopolitan in its nature. Such investors will not consider traditional industrial estates but require city centre locations of quality.

The International Economic Development Council in its' Economic Development Reference Guide[2] expresses the needs of such companies as follows:

'Talented youth, the new key to any truly successful economy, look for high-grade natural environments and places with real urban charm, sociable and walkable places with restaurants, cafés, bars, night-clubs, health clubs and public spaces.

Businesses migrate to areas where the quality of life matches the group of employees they are trying to attract . . . urban lifestyles cater for young professionals and start up businesses.

Many factors influence the decision of a company or an individual to move into or out of a city, with a major consideration being the city's quality of life. Improving the quality of life through the enhancement and expansion of public open space is a key initiative of many urban areas."

If Belfast is to begin the process of growing again, the seeds of growth will be found in a more successful City Centre. This will also contribute considerably to Northern Ireland's ability to attract inward investment in the knowledge-based and creative industries.

Belfast City Centre has already successfully attracted a number of such inward investments, hosting companies such as Fujitsu, Halifax, Abbey National, Northbrook Technologies and Liberty Mutual. It has begun to develop a better lifestyle mix, particularly in the area to the south of the City Hall where health clubs and new restaurants and other facilities are located alongside new companies. In addition it is hoped that Belfast's retail offering will be transformed by A M Development (formerly MDC) through the Victoria Square development. There may be opportunities to develop further the partnership with the private sector which is represented by Belfast City Centre Management Ltd. and the Belfast Chamber of Trade, possibly by replicating the Business Improvement District approach to city centre development which has been extensively tested in the USA and is now receiving increasing policy attention in a UK context.

But there is still much to be done to enhance the wider retail offering of the City and to improve its tourism, leisure and cultural attractions. There is the need to promote high quality office provision (noting an over-supply of mid-range office accommodation) and to promote better quality open space within Belfast City Centre. Given that there is some degree of surplus of office accommodation in the City Centre, there is an opportunity to diversify the economic and social mix of the area by considering adapting some existing office accommodation to residential or mixed-use developments. This might include some of the Victorian and Edwardian office blocks located around the City Hall. The successful and sensitive redevelopment of former office accommodation at the junction of Donegall Square and Linenhall Street into the TENsq Hotel, is an example of what can be achieved.

Horizons are beginning to be expanded e.g. Belfast City Centre Management Ltd. is working to enhance the perception of safety in the City Centre. It has also proposed a number of initiatives such as regular free '*trolley*' services (based on a replica of a Belfast tram) through the City Centre, as seen in many North American cities e.g. Portland, Oregon.

Develop the New Industries

Belfast's 19th and early 20th Century prosperity and growth was based on leading-edge, innovative companies which sold their products competitively on world markets. In the future such products will not be ships, linen or textile machinery but are more likely to be ideas, embedded in software, know-how or innovation. Such new products come from the fusion of academic research and commercial know-how. Belfast has considerable strengths arising from the work of the two Universities and, increasingly Belfast Institute but also through the tradition of engagement between the academic and commercial sectors in the City. QUBIS, the technology commercialisation company of Queen's University is one of the most long-established companies in the UK. Another strength is the Northern Ireland Science Park Foundation, established to promote new business incubation facilities at Titanic Quarter. Further to this, Queen's University of Belfast has begun building its new Electronic Commerce and Information Technology (ECIT) Institute on the same site and new incubators have opened at the University of Ulster's Jordanstown Campus just to the North of the City Boundary.

These new industries are broadly designated as the knowledge-based industries. They are characterised by commercialisation of intellectual property developed in or around University or other academic institutions. As Belfast has the highest concentration of academic institutions in Northern Ireland, it is the natural focus for these industries. In a recent survey by the think-tank Demos Belfast ranked 14th out of 40 UK cities in terms of the number of patents sought.[3]

Investment Belfast Ltd. has done much to stimulate awareness of these industries in Belfast e.g. through its Boston Lunches and £20k awards. Investment Belfast has also worked to create a forum for the common issues they face to be addressed.

Within the broad definition of the knowledge based industries, the 'creative industries' form a distinctive sub-set based around the design related sectors (architecture, craft, design etc.), the expressive industries (music, performing arts etc.) and media and information industries (advertising, film, broadcast etc.) These industries account for 4% of total employment in Belfast according to estimates produced by QUB.[4] This is approximately equivalent to employment in the hotel or transport sectors. Some 60% of the creative industries employment in Northern Ireland is in Belfast, located mainly in BT1, 7 & 9. There is a commitment in the Council's Local Economic Development Strategy to establish a series of creative industry hubs across the city, including the Brookfield Mill, Cathedral Quarter, Springvale and East Belfast. The Cathedral Quarter has been identified as a major location for the creative and cultural industries in Belfast, making a particular contribution to urban vitality, diversity and cultural tourism in the City.

In a recent workshop, the key need that emerged was that of a clean, safe, attractive city centre in which to assemble a skilled, high income workforce. While acknowledging that much had been done, those working in the sector felt that more was needed and that the current position of the city centre at times undermined the development of local businesses and of inward investment.

While new incubation premises now exist at the Science Park, there is the perception that many knowledge based businesses work, at least initially, operate from inappropriate premises.

Develop Land for Employment

Belfast was once one of the world's great manufacturing cities. Today manufacturing plays a much less significant role in employment in Belfast than in the rest of Northern Ireland. The following table (page. 47) shows the latest available data about employment in selected District Council areas in 1999 and the change in employment share between 1995 and 1999.

It can be seen that, except for Moyle, Belfast has the lowest percentage of employment in manufacturing - well under 50% of the share of the surrounding District Council areas.

The chart shows the percentage of total employment in manufacturing in Belfast, Northern Ireland as a whole and the District Council areas surrounding Belfast.

This shortage of suitably packaged land reduces employment opportunities for residents of Belfast within the City and conflicts with the fact that Belfast has an unusually large amount of vacant or derelict land within the City.

The opportunity arises to use vacant or derelict land to create new employment zones around the City Centre, to accommodate manufacturing and other traditional industries such as transport and distribution as a complement to the focus on knowledge-based industries in the Centre City corridor.

The vacant and derelict land around the City Centre is associated with disadvantaged communities and interfaces. The opportunity, therefore, arises to offer employment to those communities and to create new, neutral workplaces. This can also be combined with the physical regeneration of a number of the arterial routes into the City to link the City Centre with the Middle City communities and neighbourhoods.

This approach will need to be marked by a high level of urban design to ensure that the resulting areas are liveable and walkable and form effective and secure means of reaching the City Centre from the surrounding communities.

In addition to the creation of employment zones adjacent to the main centres of disadvantage in the middle city areas, there is scope for Belfast City Council to act to increase the supply of land for business and, therefore, the volume of employment opportunities arising. Actions which Belfast City Council could consider include:

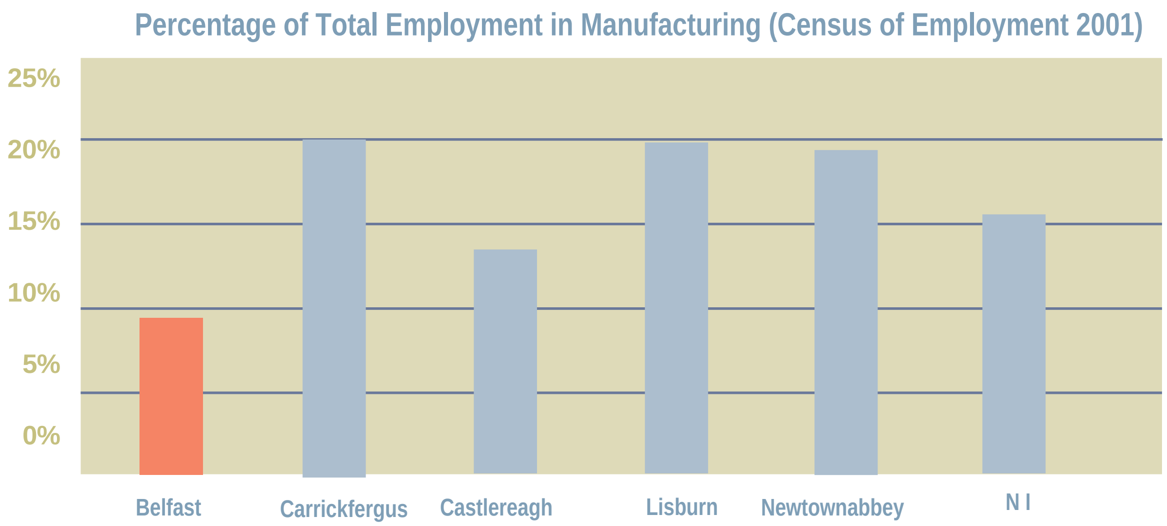
- Reviewing its own land-holdings to see if there are areas which are suitable for business development and which are not essential to the Council's operations;
- Using its new powers to assemble and develop land for business uses;
- Working with the private sector, the local enterprise agencies and other components of the social economy sector to identify ways of meeting the needs of local businesses;

- Ensuring that planning policies arising from BMAP and other processes provide a sufficient priority on land for local and smaller businesses, appropriately developed;
- Lobbying the Belfast Regeneration Office and Invest Northern Ireland to ensure that sufficient land is developed for local businesses; and
- Where the City Council itself is developing sites, ensuring that smaller businesses are specifically catered for and that the premises provided are affordable - this may require the Council to forego some of the development gain to allow savings to be passed on to the small business tenants.

These opportunities merit careful consideration, but they also need to be set in the context of Belfast City Council's wider policies and to recognise the legal and other constraints under which the Council has to work. It is recommended that the Council should commission a specific study of these issues before implementing an important strategic component of the overall Masterplan. The study could be combined with an examination in the City Centre area of the scope for converting some of the existing office accommodation into residential or mixed use accommodation and with an examination of the property needs of knowledge based businesses in Belfast - the study would, in effect, develop an implementation strategy for the main property components of the Masterplan.

Area	Manufacturing as % of Total Jobs 2001	% Change in Number of Jobs 1995 – 2001* (Censuses)		
		Manufacturing	Services	Total
Northern Ireland	16%	-4%	18%	14%
Belfast	9%	-13%	14%	11%
Carrickfergus	20%	12%	27%	20%
Castlereagh	14%	16%	21%	22%
Lisburn	20%	35%	11%	16%
Newtownabbey	19%	11%	30%	28%
Craigavon	28%	-19%	27%	11%
Moyle	8%	-12%	16%	19%
Limavady	22%	8%	22%	21%
Ards	19%	-19%	1%	-2%
Cookstown	23%	24%	31%	33%

** Relatively small 'construction and 'other' categories have not been presented separately but included in total employment change column. Manufacturing and services accounted for 93% of all employee jobs in Northern Ireland 2001*



Simplify City Governance

Effective implementation of a 15-year strategy for Belfast requires effective City governance.

At present Belfast suffers from over-governance, yet there are significant gaps in the strategic mesh of governance responsibilities.

Whilst Belfast City Council is the sole political authority with responsibility for Belfast alone and has a significant developmental capacity, the Council's responsibilities and powers are very limited compared to those Councils responsible for similarly sized cities elsewhere in the UK and Ireland.

In brief, responsibility for strategic planning falls to the Department for Regional Development (DRD), the Department of the Environment (DOE) is the planning authority for Belfast and the Department for Social Development (DSD) (through the Belfast Regeneration Office (BRO) is responsible for regeneration policy and its implementation. The DRD is also responsible for roads and public transport policies.

Invest Northern Ireland (INI), through its Belfast Local Office, is responsible for business support in the City and liaison with Belfast City Council (BCC) on Local Economic Development issues, on which it reports to the Department of Enterprise, Trade and Investment (DETI). DETI is responsible for the distribution of much of the EU funding for Belfast, apart from the URBAN II Programme which is administered by the Belfast Regeneration Office, although day to day administration has been contracted to the North Belfast Partnership (NBP).

The North Belfast Partnership is one of 5 Area Based Partnerships (ABPs) in Belfast which relate both to the Belfast Regeneration Office and Belfast City Council and seek to form a communications bridge between their local communities and city-wide issues. The area based partnerships are also forming a relationship with the Belfast Local Strategy Partnership (BLSP) which has responsibility for administering support to the social economy in Belfast under Measures 3.1 and 3.2 of the Peace II Programme. Local Strategy Partnerships across Northern Ireland are intended also to play a wider part in the civic governance of their areas, although this role is at present not well defined.

Belfast City Council has formed four arms-length companies to pursue aspects of economic development in the City. Belfast First Stop Business Shop Ltd (BFSBS) provides information and signposting to new businesses, Investment Belfast Ltd (IBL) investment in the city internationally and has been active in promoting awareness of the knowledge-based industries, Belfast City Centre Management Ltd (BCCM) takes a lead on city centre management issues working in association with the Belfast Chamber of Trade (BCT) and the Belfast Visitor and Convention Bureau (BVCB) promotes tourism in the City and the use of Belfast by internationally mobile conferences and conventions.

This 'alphabet soup' of organisations does not promote strategic governance of the City and provides a poor foundation for implementation of this Masterplan. There is an absence of an agreed overall strategy for the City (which this Masterplan is intended to address) and a lack of implementation capacity, except in the Laganside area where the Laganside Development Corporation has shown what can be achieved by strategic planning and a focus on implementation. There is a lack of clarity about who is responsible for what and certain tasks appear to fall between the organisational cracks. The system is marked by a lack of co-ordination, co-operation or consultation and the result is confusion, duplication and ineffectiveness accompanied by a wasting of organisational resources in competing overhead structures which contribute little to implementation.

There is universal acknowledgement of the need for change, yet no change has occurred. In part this is due to the acknowledged need for change in central government in Northern Ireland and the associated Review of Public Administration in Northern Ireland. The lack of change is also due to the complexity of decision-making structures and the need for a consensus approach. It is vital for the effective implementation of this Masterplan that this problem is addressed effectively.

This is particularly important because of two strategic gaps in current provision:

- There is a structural gap due to the diffusion of responsibility for strategic regeneration in Belfast. In English cities the Regional Development Agency (RDA) is responsible for business support and strategic regeneration and draws funds from the Single Regeneration Budget (SRB) to address both functions in an integrated and strategic manner. In Belfast statutory responsibility for the provision of industrial land falls to Invest Northern Ireland and the regeneration function to the Belfast Regeneration Office of the DSD, which has Comprehensive Development powers. This structural division of responsibility means that the two issues have not been addressed in an integrated and strategic manner. Instead each has been pursued as an end in its own right and as a result important opportunities for strategic regeneration appear to us to have been missed; and
- Other than in the Laganside area, Belfast has not had the benefit of a dedicated development agency. Learning from the Laganside approach and recent regeneration experience in the UK, there is merit for the creation of some form of single development agency for Belfast particularly as it is currently proposed that the Laganside Corporation will be de-designated by 2006/07;

Belfast City Council must pursue the creation of a single development agency for Belfast by 2006/07 to replace the Laganside Corporation but acting for the City as a whole. The precise model to be adopted will need to be the subject of further discussion, research and debate between the City Council and the other organisations concerned with regeneration in Belfast.

Northern Ireland Regeneration Loan Fund

In part as a result of the Masterplan process, the Belfast Local Strategy Partnership is currently leading an examination of the opportunity for a sustainable Northern Ireland Regeneration Loan Fund. The Loan Fund would support SMEs and social economy organisations to implement projects which contribute to the regeneration strategy for Belfast. Initial proposals are being developed for a £20 - 30 million loan fund which would draw contributions from the EU, Belfast City Council and the private sector. It would be expected that the Northern Ireland Fund would increase considerably due to further contributions from public and private sector investors and repayment of principle and interest from investments in supported projects.

The consultations on the development of the Northern Ireland Regeneration Loan Fund have involved Belfast City Council, the Belfast Regeneration Office, Invest Northern Ireland and the Department of Enterprise, Trade and Investment. A crucial consideration will be the ability of the Fund to meet EU State Aid requirements and a decision on whether to proceed with the formation of the Fund is expected to be taken in the context of decisions about the possible extension of the period of the Peace II Programme to end 2006.

Footnotes

[1] Census of Employment 1995 - 2001

[2] See www.iedconline.org

[3] see www.demos.co.uk

[4] ‘Investigating the Creative Industries in Belfast’, Centre from Creative Industry, Queen’s University Belfast, January 2003

A New Spatial Understanding of Belfast - A Compact City Approach

The Spatial Plan:

1. An Energised Core
2. A Connected Middle City
3. Integrated Neighbourhood Renewal
4. Released Environmental Assets
5. Enhanced Presentation of the City