

Useful links

Department of Enterprise, Trade and Investment (DETI)
www.detni.gov.uk

Northern Ireland Economic Vision (pdf file)
<http://www.nics.gov.uk/economicvision.pdf>

Northern Ireland Labour Force Survey (LFS)
www.esds.ac.uk/government/nilfs

Northern Ireland Statistics and Research Agency (NISRA)
www.nisra.gov.uk

Northern Ireland Tourist Board (NITB)
www.nitb.com

Regional Forecasts Ltd.
www.regfor.com

Visit our website at

www.belfastcity.gov.uk/stateofthecity to find out more about the Belfast: State of the City initiative.

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The Development Brief



A BELFAST: STATE OF THE CITY PRODUCT

SPECIAL EDITION

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SPECIAL EDITION Belfast: State of the City Centre 2006



The **Belfast: State of the City** initiative was set up in 2004 in response to growing concerns over the city's ability to compete with its UK and European counterparts.

Evidence from a number of urban experts, while confirming Belfast's outstanding growth over the past decade, revealed that we have a number of underlying weaknesses that must be addressed urgently by those of us involved in urban development work.

Foreword

The initiative's inaugural conference brought together many of the city's key development organisations to examine such evidence and find agreement on a way forward.

The event successfully fostered a broad consensus around a shared urban 'To Do' list of actions which were specifically aimed at tackling each of the major areas of weakness defined by our research. More than 45 organisations signed up to this list agreeing to work together more closely and to encourage a citywide strategic approach to delivering sustainable urban development.

Our second conference in 2005 focused on Belfast's economic performance and the various relationships between the city and the wider region of Northern Ireland. The importance of the 'city-region' had already been identified in our research and our second event sought to raise awareness of this 'city-region' paradigm and to engage partner organisations in rethinking the relationships between our city and its hinterland.

This year's conference sought to bring a similar focus to another aspect of our city that is crucial to our long term competitiveness. Over the past decade our city centre has experienced an amazing transformation. Following a prolonged period of decline, its redevelopment in recent years has been quite extraordinary. Indeed, such regeneration work continues unabated with major investments in projects such as Victoria Square, Royal Exchange and the North East Quarter now underway.



Above: Jon Ladd, Chief Executive BURA and Cllr Nelson McCausland, Chair of Development Committee.

Our city centre is key to wider success. It remains the 'shop window' not only for Belfast but for the entire region. It is the arrival point for many of our visitors, our business travellers and investors. Its townscape plays an important role in presenting the physical identity of the city and of Northern Ireland. As such, it is an asset that needs to be carefully cultivated as a driver for urban competitiveness.

This year's conference brought together representatives of some of the key organisations – both public and private – whose decisions shape the city centre. Delegates were presented with a detailed profile of the city centre's current health and were offered advice from some of the keenest minds in city centre development. The conference placed this analysis within the broader competitiveness agenda of Belfast: State of the City and encouraged delegates to seek shared options for delivering viable long term programmes of the city centre.

We were delighted to have the Minister for Social Development David Hanson MP join us for the event. His words echoed many of the themes and issues that have emerged from the initiative over the past three years and the Council is eager to participate in the forth-coming city summit that he announced in his speech.

There is undoubtedly a growing acceptance across Belfast that, if we are to successfully meet the challenges ahead – not only in the centre but across the city, we must establish a strong strategic approach. We hope that this year's conference has once again contributed to building such an approach.

Nelson McCausland

Councillor Nelson McCausland
Chair of Development

Below: Audience/ David Hanson MP, Minister of State for Social Development.





Above: Marie-Thérèse McGivern, Director of Development, Belfast City Council



Introduction

It is probably true to say that this year's conference focused on a subject that all of us have many strong opinions on – Belfast city centre.

Undoubtedly, of the many changes that have occurred in Belfast over the past decade, the transformation of the city centre has been one of the most dramatic. During the Troubles it was a heavily restricted security zone that had little investment and limited retail and social offerings. Today, it has a strong and quite diverse retail offering; some wonderful restaurants, bars and nightclubs; we have fine new open spaces – such as Custom House Square; and is now attracting many more shoppers and tourists. There are also a number of major developments under way – such as the Victoria Square complex – that will add significantly to the city centre's appeal in the coming years.

And yet, from the outset, the city centre has been one of the major items on our initiative's 'To Do' list. It has been identified by our researchers as an area of weakness in Belfast's move towards long term success. At our first conference in 2004, European urban expert

Professor Michael Parkinson called for us to reinvigorate our city centre. It was a call that was echoed in the Belfast Masterplan, published in the same month as the conference, which called for urban development organisations to think more strategic about the city centre and the middle city connecting to it.

Through discussion with our partners we have identified various issues of concern – the limited activity after 5pm; the general quality of the public realm and restricted green space for families and public activities. While our retail offering has undoubtedly improved immensely in recent years, there are questions around the weakness of our independent retail offering – with the danger of Belfast being labelled a 'clone' city. There are also wider strategic issues around competition from 'big box' out-of-town retailers – and the long term implications of such developments for a sustainable Northern Ireland.

The 2006 conference set out to unpick some of these issues and to encourage discussion amongst those of us who contribute to the well-being of our city centre. Speaking at the conference were two internationally renowned authorities on city centre development: **Gary Lawrence**, Urban Strategies Leader of Arup, who drew on his vast experience working with cities throughout the world to give us his expert opinion on the essential components of successful and sustainable city development. And **Jon Ladd**, Chief Executive of the British Urban Regeneration Association, who delivered a content-rich seminar on developing a vibrant city centre evening economy.

Delegates received new research commissioned by the Council that, for the first time, offers quite a comprehensive profile of the city centre. It draws on a wide range of sources to paint a picture of the city centre's population, its economy, tourism, retail, and the health of its property market. The profile – while acknowledging many gaps in our measures of the city centre, such as an analysis of independent retail – did offer some conclusions that contributed to the debate on the day.

During the day our delegates spent some time in workshops examining work around themes of Branding, Living and Retail, the outcomes of which we have published in this report.

As with much of the work identified under **Belfast: State of the City**, there are a number of important elements that need to come together to make progress on city centre development. Co-operation and collaboration are key – no single organisation or project, whether public or private, can deliver a successful city centre. It is work that requires a strong and strategic relationship between many partners, and it needs a strong sense of leadership and vision. If our conference could achieve only one



objective I would hope that it would be acceptance and commitment to such an approach.

The words of our special guest at the conference, Minister for Social Development, David Hanson MP, certainly underscored Government's recognition of this.

“Belfast is better than it was last year, it's better than it was five years ago and it's better than it was ten years ago. The challenge for us is to make sure that it's better again next year and it continues to grow for the future. I hope that today is part of that collaboration in partnership and you certainly have the commitment of the government to support the development of this city and to work with you.”

Since the conference, Belfast City Council has begun to examine its own contribution to the city centre. Such work must dovetail with the work of other organisations such as the Department for Social Development. The Council has a definite leadership role to play. Our councillors are the democratic representatives of Belfast's citizens and we want to ensure that we can foster a city centre of which people can be proud. To this end we have begun to draw together a Council strategy that will harness our services to this goal.

We believe that our conference has contributed some rich new ideas to the discussions on the future of the city centre and we look forward to working with our partners in meeting the challenges ahead.

Marie-Thérèse McGivern
Director of Development





Above: (Left to right) High Sheriff Councillor William Humphrey, Marie-Thérèse McGivern, Director of Development, Belfast City Council, Nelson McCausland, Chair of Development Committee, David Hanson MP and Peter McNaney, Chief Executive, Belfast City Council.

Programme

This year's event opened with welcomes from the **High Sheriff Councillor William Humphrey** and the **Chief Executive of Belfast City Council, Peter McNaney**, who chaired the event.

In the morning session we heard from the Minister of Social Development, **David Hanson MP**; **Councillor Nelson Mc Causland**, Chair of the Development Committee; and **Marie-Thérèse Mc Givern**, Director of Development; who together gave us an overview of Belfast city centre's ongoing rejuvenation, the current climate of investment that will see that re-invigoration accelerate dramatically, and the challenges that are still to be overcome.

Conference research – A city centre profile

In advance of this year's event we commissioned PricewaterhouseCoopers to bring together, for the first time, information on a wide range of social, economic, retail and demographic issues to offer a substantial profile of the city centre and a benchmark against which progress in the city centre can now be measured. The research identified a number of serious issues to be addressed in the city centre – issues that are multi-faceted and require a multi-agency approach – and which fed into the discussions at the conference.

A copy of the summary document '**Belfast: City Centre 2006, A Profile of People, Property and Place**' – is available from the Development Department's Policy and Research Unit.



David Hanson MP



Above: David Hanson MP, Minister of State for Social Development.

The **Minister of Social Development** spoke about the work of the Department of Social Development (DSD) in the city; and the progress that has been made by the City Council, DSD and the public sector working in partnership to drive the city forward.

"All stakeholders are working to create a sustainable and revitalised Belfast by bringing shops, jobs and homes back into the city centre where they belong."

He outlined the opportunities presented by the large scale investment in the city centre such as the developments at strategic sites including

the North East and North West Quarters, Custom House Square and at Victoria Square. He also announced ongoing investment in the public realm and the arts infrastructure; after which he went onto highlight a number of challenges that must be met in the future to make Belfast a sustainable revitalised city.

He noted a series of challenges ahead including: the need to attract a new range of businesses, retailers, restaurants and leisure outlets; the need to ensure that the city's stakeholders work closely together to maximise investment and that they have a clear understanding of the city's wider development agenda; and that the city centre development that does take place should be inclusive and beneficial to the poorest neighbourhoods.



The Minister also noted the need to conserve Belfast's historic character and to promote sustainable complementary and contemporary design within the city centre and along the riverfront.

Gary Lawrence

Speaking at the end of the morning session was **Gary Lawrence**, Urban Strategy Leader for Arup – the international design and business consultancy. He drew on both his impressive experiences as Planning Director for the City of Seattle and his more current work helping his city clients throughout the world achieve more effective, sustainable and cost effective urban development.



Above: Gary Lawrence, Chief Executive ARUP.

Lawrence suggests that for successful city development to take place a more integrated approach to problem-solving is necessary involving all urban regeneration professionals. It is important that all those with a stake and shared interest in the city's future development, including the local community, work in partnership ensuring that all the tools necessary to understand and solve the city's problems are at the table at the same time.

“Urban regeneration is one of the most political things a society does – requiring an understanding of human nature and emotions as well as technical matters.”

Planning – a non-traditional approach

Lawrence noted that throughout the planning profession there is growing recognition that urban regeneration requires an understanding of the social sciences and the emotions of nostalgia, fear, aspiration, self interest and community belief. Social science research in particular can offer direction to the regeneration of the built environment that reflects the behaviour of those living there. Research has shown that ‘fear’ is particularly relevant to the discussion of all urban centres – as it is only by

increasing the number of people on the streets in the evening, that safety and perceived fear can be addressed.

Lawrence suggests that people want to improve their lot both for themselves and for their families and that we can harness such ‘avarice’ in the public interest for city development. This can ultimately ensure that a city stays on course and develops into the type of place it wants to become.

For Belfast, where strong divisions and different cultural beliefs exist, collaboration between all people with a stake in the city's future is essential, based upon a ‘shared interest’ as opposed to a ‘blame strategy’. In this way, through what Lawrence calls ‘restorative nostalgia’, the legacy of the Troubles can be used as a launching point from which to move forward – as opposed to using ‘reflective nostalgia’ and getting stuck in the past.

Lessons for Belfast?

- Focus on **increasing competitiveness** against other cities in the UK, Europe and globally, but not within the region (as metropolitan economies either succeed or fail together).

- Avoid getting caught up in **fads and trends** by making sustainable investment choices that will be a source of wealth in the future.
- Focus on the development of the city centre **housing market**, as once established retail will follow.
- Work to increase the **number of people on city centre streets** in the evenings to increase safety and decrease perceived fear.
- Explore the **aspirational elements** of the revitalisation of the city's core to create an exciting city centre brand.
- Carry out research** – especially from a social sciences perspective – to gain knowledge of how best to increase competitiveness.
- Develop an **educated and adaptable workforce** – the only insurance policy against unforeseeable change.

“Knowledge of what we don't know is really relevant to strategic planning for cities – as it creates an obligation to find somebody who does know and include them in the mix.”



Jon Ladd

In the afternoon delegates were addressed by Jon Ladd, Chief Executive of the British Urban Regeneration Association (BURA), the leading independent regeneration organisation, on developing the city's evening economy.

“Cities coming back into vogue; if you look at government policy, they are talking about city-regions; people are falling back in love with cities.”



Above: Jon Ladd, Chief Executive BURA.

Ladd noted that it is widely perceived that the creation of a vibrant evening economy goes hand in hand with the creation of a vibrant city. Although its development cannot solve a city's regeneration problems, it is an important part of a toolkit that can contribute greatly to city development.

As every city is unique, there is ‘no one size fits all’ strategy; therefore there are a number of issues that Belfast should consider when embarking on evening economy development.

Belfast's evening economy

Ladd had a number of positive comments to make about Belfast's development work on its evening economy. They included:

- The high level of **consultation** with stakeholders;
- The broad **range of activities** that focus on more than food and drink;
- Ongoing work on **cultural activities**;
- The **critical mass** of retailers who have agreed to late night openings;
- Considerable **marketing** of evening economy's expansion to date;
- Significant progress made with the police and **Translink** regarding increased security and public transport;
- Initial **economic impact assessment**; and,
- The development of a **family orientated and inclusive environment** at the Odyssey complex, which demonstrates a similar potential for a shared city centre, further addressing the city's sectarian issues.

Evening economy considerations

Ladd presented a series of considerations for Belfast developers to bear in mind when thinking about nurturing our evening economy:

- It must be **inclusive** and comprise of an unlimited range of activities that are attractive to everyone;

- There should be options for hosting **specialist events** to bring in tourists and give people a reason to stay after work;
- A city's **output** must not take precedence over its quality of life;
- The **critical mass** of evening economy activities must be substantial in order to maximise their economic impact by creating ‘new spend’ (as opposed to merely extending the timeframe in which money is spent);
- Although **street safety** increases in line with the numbers of people on them, increased security and **policing** are still required;
- Promotion** is essential so that the public are aware of what the evening economy has to offer;
- Late night **public transport** provision is necessary to support the successful development of a city's evening economy;
- Walkways**, both within and into the city centre, must be safe and illuminated so that people feel comfortable on foot at night;
- The **design** and **infrastructure** of the area around the city centre must be considered in relation to accessibility and connectivity;
- Careful **zoning** of any future new build in the city centre is required, in order to gently guide the development of the evening economy;
- Gateways** and **main routes** into the city centre must reflect a positive image of the city to visitors;
- An overarching **management plan** by a single organisation with engagement from all stakeholders, is essential;
- Consider the use of **Business Improvement Districts (BIDs)**;
- The **engagement** of all relevant public, private and community **stakeholders** by the local council is essential; and,
- Ongoing **community consultation** is vital.

Liveability

At this early stage in the expansion of Belfast city centre's residential offering Ladd suggests that it is important to plan ahead for its development. Such residential developments not only help to underpin the evening economy but present **opportunities for mixed tenure** and for meeting the needs of families and people from all sectors.

This helps foster an inclusive city centre population, and helps guard against property being bought primarily by investors who may introduce a transient population who would contribute little to the area.

It is important that an expanding city centre evening economy does not have any adverse impacts on **established residential areas**. The **quality of life** of local people must not be compromised by inappropriately located evening activities, such as bars and clubs, and the ways and means people travel in and out of the city centre.



The Belfast 'To Do' list

The **conference** proved a further opportunity for delegates to step up the momentum that has been generated with the Belfast **'To Do' list**; review the progress made with it so far, and agree on future priorities for action on the specific critical element from the list – our city centre.

The **'To Do' list** comprises of a series of 20 clearly defined practical actions (under the thematic areas of Leadership, Economy and Quality of Life) that have been agreed by Belfast: State of the City organisations as necessary to drive forward urban regeneration in Belfast. To date the list has been officially endorsed by over 40 organisations from the public, private and voluntary and community sectors (including all NI Government Departments). The list is available from the Council's website on www.belfastcity.gov.uk/stateofthecity

A city development agenda

The **continued** engagement by Belfast development organisations around the implementation of the 'To Do' list is central to the ongoing success of the Belfast: State of the City initiative. The **Belfast Development Agenda** maps the existing priorities of urban development organisations against the priorities for action in the list.

The Council recently commissioned Lestas Consulting to carry out a review of the Agenda through engagement with partner organisations. The updated Agenda builds on previous work to reflect each organisations activities, achievements, and respective measurements that have contributed to the delivery of the 'To Do' list; as well as any changes to their policies and strategies that may impact upon city development. A Development Brief covering the issues raised by the Development Agenda will be available soon from the Development Department's Policy and Research Unit.



The Workshops

The conference ran three workshops on the themes of city centre 'branding', 'living' and 'retail'. A number of issues and required actions were raised:

Branding

- **Funding and investment needs to be secured** for city brand development.
- **Encourage community engagement** and dialogue in order to raise **civic pride** and commitment to the development of a new city brand.
- Hold **focus group sessions** at a local and international level to ascertain what attracts people to Belfast.

Living

- Ensure the city centre's residential offer is of mixed **tenure** and meets the needs of a range of users, including families.
- Encourage Living Over the Shops (**LOTS**) initiatives.
- Explore the potential role for a City **Architect** to promote consistency and quality of the design.
- **Address barriers** to city centre living, including anti-social behaviour and perceptions of safety; affordability; and lack of local services and amenities.
- Develop a city centre **car parking policy** to rationalise provision of spaces, in conjunction with improvements to accessibility and public transport.

Retail

- Focus on **mixed-use developments** – retail alone is not enough.
- Develop a city centre strategy that ensures **integration** between various city centre land-uses, and **linkages** to outlying development areas.
- Increase the **marketing** of city centre's evening economy and extended opening hours.
- Development of a 'unique aspect' to city centre retailers' product to rival **out of town shopping centres**.
- Increase tourism and residential offer to support the city centre's retail base and address underlying safety issues.
- Develop a city centre **retail strategy** to address **barriers** to the creative development of the city centre retail base, and issues faced by independent traders.