

Public Document Pack

**Democratic Services Section
Legal and Civic Services Department
Belfast City Council
City Hall
Belfast
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**Belfast
City Council**

**REMOTE MEETING OF CITY GROWTH AND REGENERATION COMMITTEE
ADDITIONAL ITEM**

Dear Alderman/Councillor,

The above-named Committee will meet via Microsoft Teams on Wednesday, 13th January, 2021 at 5.15 pm, for the additional business noted below.

You are requested to attend.

Yours faithfully,

SUZANNE WYLIE

Chief Executive

AGENDA:

4. **Growing Business & the Economy**

(c) Call for Evidence - Union Connectivity Review (Pages 1 - 16)

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Subject:	Call for Evidence: Union Connectivity Review
Date:	13 th January 2021
Reporting Officer:	Alistair Reid, Strategic Director Place & Economy
Contact Officer:	Cathy Reynolds, Director of City Regeneration & Development

Restricted Reports	
Is this report restricted?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If Yes, when will the report become unrestricted?	
After Committee Decision	<input type="checkbox"/>
After Council Decision	<input type="checkbox"/>
Some time in the future	<input type="checkbox"/>
Never	<input type="checkbox"/>

Call-in	
Is the decision eligible for Call-in?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

1.0	Purpose of Report or Summary of main Issues
1.1	This report seeks the Committee's approval to submit a response to the independent review for the UK Government (Department for Transport) led by Sir Peter Hendy on how the quality and availability of transport infrastructure connections across the UK can support economic growth and quality of life, with a specific focus on NI connections.
2.0	Recommendations
2.1	The Committee is asked to: <ul style="list-style-type: none"> - Consider and agree to submit the draft response to the call for evidence and to note that the deadline for receipt of submissions is 14 January 2021.
3.0	Main report

3.1	Belfast City Council senior officers were invited to participate in a discussion with Sir Peter Hendy and other NI local government officers on 16 th December 2020 in relation to transport infrastructure connections across the UK. Arising from this, it was felt that the Committee may wish that a formal response be submitted to the Call for Evidence.
3.2	The terms of reference for the independent review are available at: https://www.gov.uk/government/publications/union-connectivity-review-terms-of-reference/union-connectivity-review-terms-of-reference . An extension to the deadline of 30 December 2020 has been secured to 14 January 2021, to enable the Committee to consider the draft response, attached at Appendix 1.
	<u>Key Issues</u>
3.3	The independent review covers transport connectivity between England, Scotland, Wales and NI via road, rail and air, and sea. It asks for details across three broad areas: <ul style="list-style-type: none"> - the current strategy for growing the economy and improving the quality of life - information on the volume of current travel journeys and the need for/impact of improved transport connectivity - information on improvements and restrictions to NI connectivity links with England, Scotland and Wales
3.4	It will provide independent advice to the UK government on how connectivity can help support economic growth and quality of life post-COVID-19. The timeframe is for an interim report will be published at the end of January 2021, with recommendations due in the summer 2021.
3.5	The draft response, in Appendix 1, follows on from the 16 th December discussions, providing additional detail and focusing on NI connectivity. It draws on the agreed Council position in relation to: <ul style="list-style-type: none"> - The Council's response to the South West Scotland Transport Study, agreed by Strategic Policy & Resources Committee in 2019. This recognises the importance of sea connectivity between Belfast and Cairnryan, along with the A77 road improvements to enhance connectivity links between Cairnryan and the rest of Scotland, which the Scottish government has approved. - The importance of regional air routes for businesses and connectivity to other core cities; including the impact of the loss of Flybe from George Best Belfast City Airport, in line with the Council motion in March 2020.

	<ul style="list-style-type: none"> - The opportunity presented by the Belfast-Dublin Economic Corridor and high-speed rail service to improve connectivity between the core cities on the island of Ireland. - The Council's response to the DfI Call for Evidence on the Ministerial Advisory Panel for Infrastructure, considered by this Committee in November 2020. - The importance of building in environmental considerations to support the transition to a zero carbon, sustainable and inclusive economy.
3.6	<p>The responsibility for transport lies with the devolved Assembly. The draft response notes Belfast's role as the regional economic driver and transport hub with a reliance on sea and air connections to England, Scotland and Wales. It therefore highlights the importance of air connectivity for business and tourism, with the need to stabilise and sustain tourism and the criticality of transport connectivity for businesses in response to the impact of COVID. However, it also stresses the need for air travel to be delivered in a sustainable manner, which both secures long-term economic competitiveness and addresses adverse impacts upon the environment including issues such as air quality and climate change.</p>
3.7	<p>The specific transport links detailed in the draft response are the sea route between Belfast and Cairnryan; the road links along the A77 from Cairnryan to Glasgow/central Scotland; air connectivity between Belfast and London; and rail connectivity between Belfast and Dublin.</p>
3.8	<p>It highlights that a review of connectivity should consider NI's unique position with a land border with the EU, including the need to consider the Belfast - Dublin high speed rail link and noting that feasibility studies are underway.</p>
3.9	<p>In addition, the response notes that the role of local government in shaping transport and connectivity provision. As demonstrated through the Bolder Vision for Belfast, local government, working with central NI government, can influence the city's connectivity across economic, social and sustainable transport provision. This will also serve to increase and improve sustainable connectivity and infrastructure within Belfast and for the region as a whole.</p>
3.10	<p>Further information and updates on the review will be made available on the website: https://www.gov.uk/government/consultations/union-connectivity-review-call-for-evidence Members will be informed of any further engagement with local government on the review.</p>

3.11	<u>Financial & Resource Implications</u> There are no finance or resource implications attached to this report.
3.12	<u>Equality or Good Relations Implications/Rural Needs Assessment</u> There are no equality, good relations or rural needs implications attached to this report.
4.0	Appendices
	Appendix 1- Draft Response: Call for Evidence



Appendix 1

Union Connectivity Review Sir Peter Hendy Call for Evidence Draft Response

Belfast City Council welcomes the opportunity to engage in this call for evidence on the review of union connectivity. The following response is set firmly within the context of transport policy being a devolved power for the NI Executive.

The response below reflects the Council's agreed position relating to the key themes highlighted in the call for evidence, with a focus on the relevant issues and the questions directly relating to NI connectivity.

As an island economy with a land border with ROI, NI is in a unique geographic position, and is therefore more solely reliant on air and maritime connections than are Scotland, England and Wales.

Given the current economic and social challenges of COVID-19 and the outworking's of the UK-EU Trade Deal and the associated Northern Ireland Protocol this provides a timely opportunity to highlight the issues and opportunities of particular relevance to Belfast.

The response below is based on agreed Council position on the issues. The response may change, subject to Council ratification on 1st February.

Assessing the need for cross-border connectivity

1. If you represent a place, what is your current strategy for growing the economy and improving the quality of life there? Please provide a summary, but you are welcome to append or link to published strategies.

Belfast City Council leads on the community plan for the city, this first shared strategy for growing the economy and improving quality of life, places inclusive growth at the centre of its ambitions. A number of supporting strategic documents outline the plans for the growth and development of the city for the next 15 years. As the regional capital in a devolved administration, the strategies and plans for growth are aligned to the delivery of the NI Executive's Programme for Government.

Belfast's long-term strategy to grow a sustainable and inclusive economy and improve quality of life remains the "**Belfast Agenda**", the city's community plan¹. With inclusive growth as the central goal, the Belfast Agenda sets out five outcomes, which our city partners are committed to work towards by 2035. Delivery towards these five outcomes will now be shaped through a lens of rebuilding and recovering in the COVID-climate:

- Everyone in Belfast benefits from a thriving and prosperous economy

¹ <https://minutes.belfastcity.gov.uk/documents/s67530/Appendix%201%20-%20The%20Belfast%20Agenda.pdf>

- Belfast is a welcoming, safe, fair and inclusive city for all
- Everyone in Belfast fulfils their potential
- Everyone in Belfast experiences good health and wellbeing
- Belfast is a vibrant, attractive, connected and environmentally sustainable city

Aligned to NI regional policy and the Programme for Government, the Belfast Agenda highlights the importance of appropriate sustainable and inclusive development and the importance of connectivity locally, nationally and internationally, to make the city competitive and to connect people to opportunities. The ***Belfast Resilience Strategy***, agreed by Council in December 2020, further supports this with a commitment to transition Belfast to an inclusive zero-emissions, climate resilient economy in a generation.

Connected to the Belfast Agenda is the city's emerging "***Local Development Plan***", which sets out the spatial plan for the development of the city in order to deliver on the inclusive growth ambitions for the city. A significant evidence base supports this plan and a range of technical reports are available on the Council's website, including the growth ambitions and transportation².

Other relevant strategies

Belfast's recovery from the impact of COVID-19 is the current over-riding priority for the city through "Belfast: ***Our Framework for Recovery***"³. This maintains our focus on inclusive economic growth - responding to the structural shifts in the economy and ensuring residents can benefit from, and contribute to, city recovery and growth as well as being able to access jobs of the future. Building sustainability and resilience into our approaches also means accelerating our transition to a net-zero carbon economy and enabling residents to benefit from the economic and quality of life improvements this can deliver. The "***Belfast: Our Framework for Recovery***" sets out the areas we need to focus on in the short term to drive immediate city recovery. It also sets out our priorities for building the foundations for sustained recovery to support our longer-term city outcomes in the Belfast Agenda.

The Council's Innovation & Inclusive Growth Commission, an independent panel of experts comprising the city's anchor institutions and chaired by Belfast Harbour, produced a stimulus paper to inform the Council's approach to city recovery (2020). This identifies city-to-city connectivity, connecting people to jobs, improving skills, place-making and energy transition (green) as critical growth levers for Belfast and recommends a renewed urgency to deliver on these, given the effects of the pandemic.

The Council has specifically identified enhancing connectivity as a priority to support the economic and community recovery. With an agreed and shared "***Bolder Vision for Belfast***" the Council, Department for Infrastructure, and Department for Communities are working to identify and accelerate opportunities to create healthy, shared, vibrant and sustainable environments. These will promote wellbeing and enhance access to jobs, by connecting the city centre and surrounding communities. A copy of the shared Bolder Vision for Belfast is available at: <https://www.belfastcity.gov.uk/Documents/A-Bolder-Vision-for-Belfast>

Given the shared responsibility for several key functions (e.g. regeneration) across local and central government in NI, and the devolved powers of the NI, it is vital that effective collaborative and shared commitments, plans and resources are in place in order to deliver integrated place-making functions, which can deliver the benefits associated with improved connectivity.

NI is in a unique position having a land border with an EU member. Recognising the potential opportunities from this, Belfast City Council has been working with council's and university partners

² <https://www.belfastcity.gov.uk/ldp>

³ <https://www.belfastcity.gov.uk/news/belfast-city-council-prioritises-covid-19-city-rec>

to develop a Belfast-Dublin economic corridor and feasibility studies are underway into a Belfast-Dublin-Cork high speed rail option. Belfast is also working with neighbouring Belfast region councils to deliver the **Belfast Region City Deal**. The region has a population of around 1 million people and is recognised as NI's key economic engine, generating total GVA of approximately £24,320m while providing critical access and transport links for trade and tourism⁴.

2. Please provide any information you hold about current multi-nation journeys within the United Kingdom.

Please provide information relating to current journey volumes, assessments of future demand, journey reliability and locations/corridors of particular strategic importance. In particular, please provide information about current journey levels, assessments of future demand, locations of important strategic transport corridors and the reasons for importance

Air connectivity

Air routes are vital for island economies and a strategic priority for economic development and tourism. NI is more reliant on air transit than other parts of the UK (where city-to-city linkages may be serviced by train or bus connections).

The Belfast International Airport (BIA) and George Best Belfast City Airport (GBBCA) can both be accessed from Belfast city centre within 30 minutes and over 8.65m business and leisure passengers travelled through the two airports in 2019. Through the work of the Innovation & Inclusive Growth Commission, connections between Belfast and London were highlighted as a critical lever and key attractor for business. This must be supported by investment in physical infrastructure and digital connectivity in order to maximise business-to-business connectivity and support the overall accessibility and economic potential of the region.

Several research studies commissioned by Belfast City Council have identified the importance of the city's connectivity and access to other markets. Oxford Economics (2012) suggested that one in ten of all jobs created in FDI businesses need access to an airport to sustain their business. Having access to a city airport is a critical success factor for Belfast. Around 65% of the airport users are business travellers who tend to value short airport transfer times. Therefore, the location of GBBCA in close proximity to the city and a flight time of under 90minutes from Belfast to London enables them to draw maximum advantage from their working day. The changing nature of the economic landscape in Belfast and the growth of finance, business services and IT sectors have contributed to new routes and emphasise the importance of the Belfast City to London City route. It is essential that these routes are developed as the service sector FDI growth is projected to continue (despite the global slowdown).

Air routes are critical for **tourism and connectivity** with the European market, GB and ROI being key to compensate the reduced demand from the US in the medium-term. Union connectivity is highlighted by the significance of the GB tourism market in Belfast and NI - from 2017-2019; over two fifths of the overnight stays in Belfast were from GB.

With 1.9million visitors to Belfast last year (overnight stays) tourism has been a key economic sector in terms of the spend generated and it supports over 21,000 jobs⁵, approx. 9% of the total number of jobs in Belfast.

A recent report by Ernst & Young (2020) highlights the importance of tourism for the Belfast economy and the potential impact of COVID-19. In terms of the tourism market in Belfast it states that:

⁴ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/789253/HoT- City Deals- Final - with signatures_1 .pdf

⁵ <https://www.nisra.gov.uk/publications/local-government-district-tourism-statistics-publications>

- Spending by tourists in Belfast has outpaced the NI average, growing by 20% year on year compared to 4.5% regionally.
- Belfast has grown at a faster rate than the rest of NI mainly because of its attractiveness in two high value markets – city breaks and business tourism.

The report concludes that COVID-19 could have a stronger impact on the tourism and hospitality sectors in Belfast due to three main factors.

- 1) the greater reliance on overseas markets rather than staycations;
- 2) the adverse impact of COVID on the cruise tourism market (2017-2019 saw a 60% increase in cruise ships docking in Belfast. In 2019, 146 cruise ships visited Belfast bringing over 270,000 passengers and cruise staff²) and;
- 3) the reduction in business tourism which is likely to take significant time to recover.

The report puts forward several scenarios for the impact of COVID on tourism and in all scenarios, it is projected that Belfast will rely heavily on the ROI and GB market in the coming years in order to sustain and rebuild the tourism market. A summary of the key findings from this report was presented to the Council's City Growth & Regeneration Committee⁶ in August 2020. Air (and sea) connectivity to GB routes are therefore vital to support the stabilisation and recovery of the tourism sector and the longer term inclusive economic growth ambitions for the city.

Despite UK government rescue efforts, in March 2020, just before the first UK COVID lockdown period, the major regional airline Flybe ceased operations. This has been one of the leading carriers at Belfast as well as Manchester, Birmingham and Southampton. This has been a significant loss for Belfast, with George Best Belfast City Airport losing 14 routes. Loganair will now operate the Aberdeen and Inverness services. However 12 other routes are no longer operating, significantly reducing Belfast's connections to core cities such as Birmingham and Manchester.

The Council supported a motion to declare a Climate Emergency and has stressed the urgent need to maximise carbon reduction to limit global warming. It is vital that environmental considerations are factored into any review of connectivity to support the transition to a low carbon, inclusive economy. Whilst this may initially seem at odds with highlighting the importance of air travel, we believe that government can do more to encourage the aviation industry to reduce its carbon and noise footprints through improved/new technologies and practices.

While the full impact of COVID continues to unfold, it is clear that the tourism sector will be severely impacted and opportunities to provide new investment into the sector to create new employment opportunities is expected to be a vital component for economic recovery. The ongoing commitment to the Belfast Region City Deal which provides for £850m co-investment in infrastructure and regeneration opportunities to deliver inclusive economic growth in the region is a prime example of how programmes are being channelled to deliver maximum benefits.

Rail connectivity

To take account of the needs and unique circumstances of NI, it is relevant to consider the benefits that can be gained by enhancing all-island connectivity within the Union connectivity review.

Belfast City Council and five other local authorities on the Belfast-Dublin corridor have worked with Arup to produce a feasibility study for an enhanced Belfast-Dublin rail link (2019). **(see Question 8)**

⁶ <https://minutes.belfastcity.gov.uk/documents/s85507/August%20CGR%20-%20Tourism%20Update.pdf>

Maritime Connectivity

Belfast Harbour is the second largest port on the island of Ireland. Around 70% of NI's seaborne trade is handled by Belfast Port and 20% of that of the entire island of Ireland.

In 2019, more than 24m tonnes of goods and 1.6m passengers passed through Belfast Harbour. Most of the trade passing through Belfast Port is bound for GB – in 2019, around 72% of the overall tonnage levels, 10% trade with the EU and 18% with the rest of the world. There is a large amount of freight traffic between GB and NI, totalling 850,000 freight movements per year, almost two thirds of those movements were through Belfast Harbour, making it one of the busiest ports in the UK.

Ferry routes operate on a daily basis from Belfast to Cairnryan, Heysham and Birkenhead. With six crossings per day (return) and a two hour crossing time, the Belfast-Cairnryan route is the busiest and fastest between GB and NI directly into the city. The town of Larne, a 45minute drive from Belfast, also offers a sea crossing to Cairnryan on a daily basis.

With improved transport links between Dublin and Belfast, Dublin Port provides an option to connect to Holyhead in Wales in under four hours, (plus 2 hours travel by car to reach Dublin Port). Again, the unique location of NI/Belfast means that it is important to factor in Belfast's relationship and connectivity to Dublin in the review.

3. In general terms, is there a need for new or improved transport links between the nations of the United Kingdom?

If so, please explain why and provide evidence to support your view. Please ensure that your response relates specifically to multi-nation transport links and not to improvements in connectivity in general.

Please refer to the answer to Q2.

In addition, there is a need for improved connectivity within NI and the NI Executive's New Decade, New Approach commitments highlight investment in infrastructure. Along with the better connections between Belfast and Dublin, it identifies several key projects that require additional investment to improve connectivity in NI –

- A5/A6 roads to enhance east/west connectivity; and
- York Street Interchange, led by the Department for Infrastructure to improve the flow of traffic in the city and improve key connections for traffic from Belfast Port.

It is also worth noting the plans to develop the Rail/Bus Transport Hub within Belfast city centre. This has been identified in the Belfast Agenda as a key element to improving sustainable transport and connectivity in the city as part of the city development and growth agenda. As a multi-modal transport hub in the city centre, this will significantly improve the gateway into the city centre as well as enhancing the convenience and connectivity of the regional rail network and sustainable transport links, enabling onward connecting journeys.

4. What are the main obstacles and challenges in improving transport connectivity between the nations of the United Kingdom?

Please provide evidence relating to any specific challenges that prevent or hinder the development of additional or improved transport links. Please consider socio-economic, political, organisational and practical issues.

As discussed in Q2, NI is in a unique position, as the only city with no road or rail connection to GB and the only part of the UK with a land link to the EU. Within NI, Belfast is the only major city, with a population of 343,500 and over 1 million in the Belfast Region. For comparison, Derry City & Strabane council area, which is home to Derry City Airport, has a population of 151,300. On the island of Ireland, Dublin is Belfast's neighbouring major city, with a population of almost 555,000 and over 1.2m in the Greater Dublin area.

The specific challenge for NI is that transport links to GB are wholly dependent on the private sector. Therefore connectivity depends on the profitability and good-will of those air and sea transport providers. As shown by the recent collapse of Flybe, NI's connectivity cannot be taken for granted. The added impact of COVID therefore leaves NI's connectivity in a precarious position. In GB, the public sector can intervene to an extent through investment in road infrastructure.

5. What evidence exists to demonstrate the potential impacts of improved transport connectivity between the nations of the United Kingdom?

Please ensure that your answer relates directly to transport connectivity between the nations of the United Kingdom and not to transport connectivity in general. Please consider economic, social and cultural impacts and provide documents or links. Please also highlight specific potential growth areas such as housing or wages.

See response to Q2

6. When making transport investment decisions which aim to improve connectivity between the different nations of the United Kingdom, does the current appraisal framework capture all the potential impacts?

Please provide evidence such as links to existing reviews or analysis that may have already considered this.

Transport remains a devolved matter for the NI Assembly and the Council would welcome collaborative opportunities on transport and infrastructure issues to support the sustainable development of the city, particularly in managing ongoing recovery from the impacts of COVID.

It is considered that environmental considerations should also be fully factored into the appraisal frameworks. In light of the UK government's levelling up agenda, the Council would also reinforce the opportunity to progress a sustainable and inclusive economic and social growth agenda when making transport investment decisions.

Opportunities for Improved Transport Connectivity between the nations of the United Kingdom

7. Which specific journeys would benefit from new or improved transport links?

Please identify two or more specific points within the United Kingdom for each journey and provide details as to why each journey has been identified. Please list these journeys in order of priority. Please ensure that these journeys traverse two or more nations. If none than please go to Question 8.

As previously highlighted there are several links between NI and GB; including London, Edinburgh, Cardiff and other core cities such as Glasgow, Manchester, Newcastle, Birmingham, Bristol. However, due to the reliance on sea and air connectivity, NI is reliant on private transport

operators. Given the distinct issues that NI and Belfast have, we have combined the response to Q7 and Q8 to focus on NI connectivity.

See response to Q8 for information on specific journeys that would benefit from improved transport links between NI and GB.

Connections to Northern Ireland

8. With reference to the unique geographical position of Northern Ireland please set out how best to improve cross-border transport connectivity with other nations

Please consider all possible transport options including maritime, air and rail or road via a fixed link and provide evidence as to the cost, benefits and environmental impact of these options.

Given the geographical position of NI, air and sea connectivity is vital to sustain connections between the NI and GB markets. High-speed rail is not an option to connect NI to GB markets. The Council has stressed the importance of environmental considerations; we would therefore welcome further government efforts and research to improve aircraft and travel performance in these areas.

Given the unique position of NI and particularly in the context of the NI Protocol, it is equally important to consider connectivity between Belfast and Dublin by maximising the rail connections. The recommendations from the Belfast Innovation & Inclusive Growth Commission to the Council emphasised city-to-city connectivity to help shore up and lever the city's COVID-19 response and recovery plans.

Maritime Connectivity

In August 2019, Belfast City Council submitted a response to the South West Scotland Transport Study consultation 'Support for Investment in Transport Infrastructure in South West Scotland' and included the following comments: That the Council:-

- *recognises the long-standing cultural and economic ties between Northern Ireland and Scotland and that fundamental to increasing the benefit to Belfast from this connection is the need to improve transport connections between Scotland and NI*
- *welcomes the fact that the ferry services between Cairnryan and Belfast, by Stena Line, 6 times per day, and between Cairnryan and Larne, by P&O, 7 times per day, are among the busiest services in the UK and represent a strong opportunity for economic and tourism growth. However, the inadequate transport infrastructure beyond the ferry terminals at Cairnryan is inhibiting that growth and require investment to bring them up to standard; and*
- *supports the campaign in Ayrshire and Dumfries and Galloway for investment in the roads infrastructure - along the A77 towards Glasgow/central Scotland and along the A75 towards the Scotland/England border, which are both predominantly single carriageway routes and pass through a number of small towns and villages – and in the rail infrastructure along the same routes, and agrees to write to the Scottish Government in support of calls for a long-term programme of investment in the transport infrastructure of South West Scotland.*

The ports at Cairnryan provide:

- the only non-air trade route between Scotland and NI / Ireland;
- the only ferry routes to enable personal travel directly between Scotland and NI, two regions with historic and cultural ties;
- a short 2 hour sea crossing route to NI for traffic from across England;

- local employment on the ferries and at the ports. During the engagement exercise for the study it was noted by the ferry operators that over 300 people are employed at the ports and on the ships, with a considerable proportion of employees living locally. In addition, while local benefits of through-traffic to the ports which does not stop (such as driver spend) is likely to be limited, many freight business ferry users employ HGV drivers (and other support staff) from the local area. Any reduction in port usage could therefore reduce locally available employment opportunities.

Any major loss of customers to other routes could lead to a diminution of the current service with associated negative impacts. These include a drop in commercial trade and visitor numbers from GB to Belfast as alternative routes (Liverpool) might be less attractive due to ferry times rising from approximately 2 to 8 hours, or that traveller numbers might be lost to Dublin if customers use the Holyhead crossing instead. There were also cultural implications, as mentioned previously, with the strong historic ties between NI and Scotland. A baseline review was therefore undertaken to understand existing trends associated with traffic through the ports at Cairnryan.

Data indicates that between the two operators (P&O and Stena Line), 1.75 million passengers, 413,000 cars, and over 400,000 goods vehicles were moved in 2017. These figures underline the freight-focussed nature of the Irish Sea routes with the total number of commercial vehicles carried almost matching the number of cars carried. Averaged across the year, around 1,100 commercial vehicles per day are therefore using the ports at Cairnryan.

Analysis of origin-destination surveys showed that freight traffic travels from across the UK to access the ports, owing to the relatively shorter sailing time compared to competitor ports. However, analysis of Specialised Goods Vehicles confirmed the strategic importance of the A75 and A77 to the freight industry in terms of providing access to the short sea crossings from the ports at Cairnryan. Despite this, journey time analysis suggests that travel times to the ports at Cairnryan are considerably longer for the last 100 miles of their journey, relative to competitor ports at Heysham, Liverpool and Holyhead. Concerns have therefore been raised by stakeholders in the South West of Scotland about a potential loss of ferry market share to competitor ports owing to relatively poorer surface access arrangements

Rail connectivity

To take account of the needs and circumstances of NI, it is essential to consider the benefits that can be gained by enhancing all-island connectivity within this review. In May 2018, the Council passed the following motion highlighting the opportunities from Belfast-Dublin collaboration and connectivity:

“This Council acknowledges the ever growing importance of relations between Belfast City and Dublin City as the main economic drivers within each jurisdiction. Furthermore, regardless of the outcome of negotiations around Brexit, it is imperative that relations continue to flourish between both cities, to the mutual benefit of all along this increasingly significant economic corridor. Accordingly, this Council agrees to establish a joint plan around co-operation regarding working relationships within the economic corridor. Going forward, this Council commits to ensuring key areas of progress and collaboration focussing on:

- *a complementary approach to inward investment and job growth;*
- *achieving Inclusive growth; and*
- *developing Infrastructure and connectivity.”*

Belfast City Council and five other local authorities on the Belfast-Dublin corridor have worked with Arup to produce a feasibility study for an enhanced Belfast-Dublin rail link (2019). A copy can be made available to the review team on request. This is supported through research carried out by the Ulster University & Economic Policy Centre and Dublin City University⁷ which considers the economic potential and opportunities of a Belfast-Dublin Corridor.

The current transport conditions are:

- Journey times of 2h / 2h15min don't offer advantage over car / coach.
- Low frequency of trains (eight per day) for a major inter-urban route (compared with hourly coaches from Belfast-Dublin). Further comparisons with core city connections in England emphasise the low frequency, with over 30 trains per week-day running between Manchester and Birmingham.
- Low attractiveness to business users e.g. first northbound train does not reach Belfast until 9.45 am.
- Airport connections not offered by Enterprise service.
- The Dublin train terminus, Belfast Lanyon Place, is 1km from city centre with limited onward travel options.

This study indicates that improved inter-city connectivity offers the chance to tackle a range of strategic objectives:

- I. Enhance inclusive, sustainable economic growth along the whole Corridor.
- II. Increase access to skilled workforce and job opportunities along the Corridor.
- III. Allow all towns and cities in the Corridor to specialise, capitalising on their strengths.
- IV. Support increased housing and commercial development.
- V. Collaboration to support international competitiveness and capitalise on connections for all island.
- VI. Reduce long-term car dependence and address environmental challenges.

The study outlines that the six objectives (*above*) could be met by a rail service that can:

- Achieve a 60-min journey time Dublin-Belfast.
- Provide at least two trains per hour: one fast + one semi-fast.
- Provide a connection to Dublin Airport.
- Integrate seamlessly with public transport networks along the Corridor.

Air connectivity

The NI Executive has devolved powers relating to airports in terms of land use planning and airport surface access issues; aviation policy remains a reserved matter for the UK Government. Unlike other regional cities in Scotland, Wales or England, Belfast's largest neighbouring airport at Dublin operates within a separate tax regime with different operating targets linked to the development of the ROI national economy.

⁷ <https://minutes.belfastcity.gov.uk/ieListDocuments.aspx?CId=163&MID=9843#A155901>

Research shows that there are positive economic impacts in the vicinity of airports with good quality regional air connectivity. This tends to increase service sector related employment. Air connectivity routes that support business connectivity supports regional economic activity⁸.

There are particular flights times relating to the Belfast- London connections which are of strategic importance to the economic well-being of the city and the wider region. It is vital that these are maintained and secured; primarily to early morning departures and late evening return flights (within permitted timetables) from the key hub airports of London Heathrow and London Gatwick. Indeed the Council has previously called for the Belfast to London service to be considered as a Public Service Obligation Route.

Due to its geography, NI is disproportionately dependent on air transportation for connectivity with England, Scotland and Wales. This emphasises the importance of considering the rail connectivity between Belfast and Dublin to support economic and social recovery and longer term growth.

Regional and international connectivity provided by air transport is of vital importance to Belfast and the NI economy and its population. However, it is essential that air travel is delivered in a sustainable manner, which both secures long-term economic competitiveness and addresses adverse impacts upon the environment including issues such as air quality and climate change.

9. Other than geographic, are there any other specific restrictions to improving connectivity between Northern Ireland and other nations in the United Kingdom?

Please consider legal, policy and practical restrictions. Please set these out and provide evidence as to how they may limit opportunities for improved transport connectivity. Please also consider this in the context of the United Kingdom's departure from the European Union.

The final detail and implementation of the NI Protocol will determine the ease of trade, investment and travel for domestic, business or leisure purposes to/from NI. This must be read alongside any future transport policy for the UK as a result of the departure from the European Union.

Since 2014, Belfast has formed strong city strategic relationships with the City of London and Dublin and this remains a key lever for the future economic, social and environmental development of the city.

There are some very specific issues for Belfast and NI, which do not apply elsewhere across GB. These relate, in particular, to the land border with ROI, which has a large international airport in Dublin – as well as a number of regional airports. These airports operate under a different taxation regime – in particular regarding Air Passenger Duty (APD) levels.

As per the Council's response to the Ministerial Panel for an Infrastructure Commission, the majority of NI infrastructure has suffered from long-term under-investment resulting in the need for significant investment in key infrastructure provision including rail, and sustainable and active travel. There is a need for a longer-term regional prioritised infrastructure strategy and updated integrated localised strategic plans such as Belfast Metropolitan Transport Plan. Longer-term planning, clear priorities and a sustained commitment to invest in robust and quality infrastructure is vital to provide stability. This must take account of the commitments to decarbonisation and sustainable development as well as the need and demand for increased digital connectivity. This will support the economy in terms of business investment decisions and increasing the opportunities for residents as well as improving quality of life, for both transport users and residents.

⁸ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/767231/wider-economic-impacts-of-regional-connectivity.pdf

Final questions

10. What else can be done to support greater transport connectivity between the nations of the United Kingdom?

As responsibility for transport is a devolved matter, the involvement of the devolved governments in the review and plans for greater transport connectivity is vital. Along with this, it is essential to recognise the role that local government plays in influencing and shaping transport and connectivity requirements through community planning and enabling enhanced greener, sustainable and inclusive transport and connectivity.

The NI Minister for Infrastructure has recently called for evidence on the establishment of an Infrastructure Commission for NI to be in place by 2022 that will develop a 30+ year vision to provide the overarching framework and vision to meet future economic growth, environmental and societal needs. The Commission will recognise climate change as a key challenge and the role of local government as a key stakeholder.

11. Do you have any further comments?

A balanced and sustainable approach to developing connectivity between core cities is critical for Belfast and the region to be able to compete and to secure the potential for recovery and longer-term inclusive economic growth.

In order to ensure that greater transport connectivity between NI and England, Scotland and Wales is in line with the UK government's levelling up agenda, it is essential for both inter and intra connectivity to be considered and aligned. The complex inter-dependencies of a connected transport system should be recognised if it is to fully contribute to the goal of levelling up.

Local government, working with central NI government, has a vital role in influencing the city's connectivity and direction of travel across economic, social and sustainable transport provision, as demonstrated through the recently adopted Bolder Vision for Belfast which has been agreed by Belfast City Council and the Departments for Infrastructure and for Communities.

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