

Document Pack

**Democratic Services Section
Chief Executive's Department
Belfast City Council
City Hall
Belfast
BT1 5GS**



8th December, 2011

MEETING OF DEVELOPMENT COMMITTEE

Dear Alderman / Councillor,

The above-named Committee will meet in the Lavery Room (Room G05), City Hall on **Tuesday, 13th December, 2011 at 5.15 pm**, for the transaction of the business noted below.

You are requested to attend.

Yours faithfully

PETER McNANEY

Chief Executive

AGENDA:

1. **Routine Matters**
 - (a) Apologies
 - (b) Minutes
 - (c) Requests for Deputations
2. **Marketing Belfast**
 - (a) Presentation from Belfast City Centre Management
3. **Performance and Financial Reporting**
 - (a) Departmental Plan - Quarterly Update (Pages 1 - 10)
 - (b) Outstanding Accounts (Pages 11 - 14)

4. **Neighbourhoods, Communities and People**

- (a) Review of Community Development (Pages 15 - 22)
- (b) Ormeau Baths Gallery (Pages 23 - 24)

5. **Shaping Belfast**

- (a) Cathedral Quarter Trust - Development Plan (Pages 25 - 46)
- (b) Belfast Rapid Transit (Pages 47 - 54)

6. **Belfast's Economy**

- (a) Irish Technology Leaders' Group - Update (Pages 55 - 58)
- (b) Northern Ireland Assembly - Inquiry re: Creative Industries (Pages 59 - 72)
- (c) Support for Independent Traders - Update (Pages 73 - 76)
- (d) Visit by Lord Mayor of London (Pages 77 - 78)
- (e) Black Box (Pages 79 - 160)
- (f) European Regional Development Fund - Enterprise Support Initiatives (Pages 161 - 164)
- (g) City Dressing Campaign (Pages 165 - 178)



Belfast City Council

Report to:	Development Committee
Subject:	Quarterly update of the Departmental Plan (Q2)
Date:	13 December 2011
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officer:	David Purchase, Policy and Business Development Officer, ext 3792.

1	Relevant Background Information
1.1	The Development Departmental Plan 2011-2012 was approved by the Development Committee on the 15 June 2011 with agreement that update reports would be presented to Committee at later dates. This update is for the period up to 30 September 2011.

2	Key Issues
2.1	<p><u>Method and key to coding</u> Service and unit managers were asked to provide updates on the status of their unit's key actions as listed in the plan and to provide commentary if necessary. The classifications used to provide updates are outlined below and progress is monitored using the flagging system:</p>
2.2	<p>Complete – the action is complete and deadlines/targets met. On target – action has begun but is not yet complete. Ongoing – the action is day-to-day activity that continues through the year and there are no unexpected delays or issues.</p>
2.3	<p>Deferred – the action has been deferred due to changing circumstances or priorities. Externally Delayed – the action has been delayed due to circumstances outside of</p>

	our control e.g. planning permission not received, waiting on a partner, etc. Delayed - project is delayed. Cancelled – the project has been cancelled with committee approval.
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3	Resource Implications
3.1	There are no additional resource implications.

4	Equality and Good Relations Considerations
4.1	There are no Equality and Good Relations considerations attached to this report.

5	Recommendations
5.1	The Committee is asked to note: <ul style="list-style-type: none">- The update of Development Department's plan for the period up to 30 September 2011.

6	Decision Tracking
There is no decision tracking attached to this report	

7	Documents Attached
Appendix 1: Quarterly update of the 2011/12 Departmental Plan for the period up to 30 September 2011.	



Departmental Plan 2011/12
**Development
Department**
Quarter 2 Update



Internal document





7.0 Update against Key actions: end of Quarter 2 - 2011/12

1.1 City Leadership

Place Shaping Role

- Complete the Belfast Masterplan and identify the Council's key priorities for physical development and infrastructure in Belfast.
 - **Delayed** - This project has been delayed while discussions continue with senior staff and members about the next Corporate Plan and the impact of the 'Economic Stimulus Package.' Therefore we have been coordinating further internal consultation to ensure alignment with Council objectives and recognition of ongoing work by stakeholders. A draft plan will be presented to Committee in December.
- Deliver 4 State of the City Development Debates to inform BCC's urban regeneration and economic development leadership role.
 - **On target** - The last of the first series of four debates was successfully delivered on June 28. Neil Gibson from Oxford Economics spoke about the challenges facing the NI economy, which he described as being in a worse condition than that of Greece. It has been agreed that the next series of events will concentrate on the theme of marketing Belfast. The speaker Dr John Heely has been booked and invites sent out for the event on 19/10/11.
- Set up a City Economic Partnership to design and implement a Belfast Integrated Economic Strategy with DETI, DEL, InvestNI and other stakeholders.
 - **Delayed external causes** - This is delayed for two main reasons. Firstly, it was agreed that our strategy should align with the regional strategy, the publication of which has been repeatedly delayed. We are also currently working with Members and CMT to establish what the Economic Stimulus Package will include and consequently where the Integrated Economic Strategy fits. We have completed research into the economic climate.
- Develop an EU urban funding strategy for 2011-13.
 - **On target** - The Draft Urban Regeneration Plan has now been replaced by the work on the Economic Stimulus Package. A draft urban policy framework is expected in Q3. Both are informing the EU Urban lobby. Additionally, we have met with DFP officials and EU Commissioners, met Commissioner Hahn in Brussels, drafted a joint Belfast/Derry Paper, and a 2nd draft paper is underway and a lobby programme is planned.
- Policy lead on planning and transportation.
 - **On going** – We continued work in relation to the Royal Exchange, Regional Transit, Yorkgate Interchange and strategic infrastructure proposals. We also coordinated Council's response to Belfast on the Move, and the Rapid Transport enabling measures including consideration of proposals by Committee. Work is progressing on the development of a draft Council work plan travel proposals.



1.2 Better Care for Belfast's Environment

Promote green business opportunities

- Ensure successful completion of BITES (business improvements through environmental solutions) programme by 12 companies.
 - **On target** – the first programme was completed in September. The evaluation shows that the 10 participating companies made savings of £75,264 and made carbon equivalent savings of 151.3 tonnes. All the companies are now aligned with BS8555 level 3 for Environmental Management. The programme was rated as good or excellent by all participants.

1.3 Better Opportunity for Success Across the City

Job creation

- Create 110 jobs via business development programmes for 1000 companies.
 - **On target** – so far this year we have helped to create 44 new jobs with the businesses we work with. Despite some programmes being delayed due to the letter of offer from DETI being delayed, our various business programmes have supported 1,249 small businesses and start-ups so far this year.
- Deliver city markets at St. George's and Smithfield and support creation of 2 new markets in Belfast.
 - **On target** – the Markets policy work is ongoing. We are currently processing the public consultation information that we collected. We are also developing an action plan to assist Smithfield tenants.

Employability and skills

- Deliver employability and skills programmes and secure commitment to Belfast Employability and Skills Plan.
 - **On target** - Political endorsement was reached in June 2011. The DEL minister is due to take the proposals to the Assembly in September/October. Our HARTE programme was initially delayed pending Committee approval. However, it was endorsed in June 2011 and a Contractor was appointed in August 2011.
- Support integrated implementation of 6 elements of Titanic Quarter Memorandum of Understanding (employment, community outreach etc.).
 - **On going** - To support recruitment for Titanic Belfast, an Employers event was held on 23rd September to raise awareness of the service. Additionally, outreach plans have been prepared and are being rolled out. We continue to support the MOU process and Titanic Quarter access group.

Maximising Tourism and culture potential

- Hosting Belfast MTV Europe music awards, in conjunction with the NI Tourist Board.
 - **On target** - Everything is in place for delivery on the 6th November.
- Prepare an integrated Titanic/2012 Events Programme.
 - **On target** - Work is on going to formulate an extensive programme to mark the centenary anniversary. A project group has been established to look at



- developing a programme of events both from a community/education perspective and in relation to normal paid for ticketed entertainment events to celebrate the 150th Anniversary of the Ulster Hall. A budget has been allocated for this programme in 2012, however we are expecting this to also provide income generation. All events to date this year have been delivered on time and on budget.
- Deliver actions within the Integrated Tourism Strategy including the 'Belfast Story', the Tourism 9 Places/Community Tourism, the Maritime Heritage Trail and enhancing our visitor attraction portfolio.
 - **On target** – most of this work is on target. The Maritime Heritage Trail concept has been developed and costed. Subsequent feedback from Committee has initiated some changes and the Trail is being reworked. An economic appraisal for expenditure has been carried out by NITB. A submission for grant funding from NITB is due to be made in November. The trail is due to be completed by April 2012. £360,000 has been agreed by committee to support the Tourism 10 Places project for 3 years. Furthermore, 4 places have been prioritised for immediate support including the Gaeltacht Quarter, Queen's Quarter, Shankill and the Cathedral Quarter. Work will commence in November 2011. Work continues to develop and promote elements of the Belfast Story. For example, BCC has supported NIEA and Tandem Design to publish an archaeological history of Belfast and work continues to develop the History of Belfast for 2012. We are currently reviewing the potential of incorporating the Belfast Story into new plans for the relocation of the Belfast Welcome Centre. However, the specific activities referred to in the original project plan have had to be put on hold whilst we prioritise projects such as the Rise Project, MTV and Music Week and those others more directly related to preparing for the 2012 events in partnership with key stakeholders such as NITB.
 - Produce options and secure investment for the provision of increased integrated conference and exhibition facilities in the city.
 - **On target** - An economic appraisal is currently being carried out to look at the City options for integrated conference and exhibition facilities. The preferred option is currently a project that looks to extend the facilities at the Waterfront by building a 2 storey extension over the service yard with a cantilever section out onto Lanyon Place. The Economic Appraisal is due for completion by the end of November. Committee approval has also been given to apply for ERDF funding in the next funding period which is due to be opened in early November. As part of the overall funding package there have been extensive negotiations with DETI in relation to co funding. It is proposed that the business case is presented to Committee in December.
 - Deliver actions within the integrated Cultural Strategy.
 - **On target** – although this project has been delayed slightly from the original timescales, the final recommendations will go to Committee in March 2012. The delays were caused by not being able to use consultants to support the consultation stages. This meant internal resources had to be made available, which delayed the consultation process. However, good progress has been made and so we are only slightly off target to complete by the original end date of Feb 2012. For example, consultation with the cultural sector has now been completed through questionnaires and 4 workshops, funding arrangements have been approved for another year, draft recommendations have been presented to Members, who have requested a further half day workshop to discuss further. Revised recommendations will go to Committee in November followed by equality screening and external consultation.



- Invest £1.4M in cultural and artistic activities.
 - **On target** - £1.32 million has so far been distributed to 114 culture and arts organisations.
- Confirm and consult on City Events Strategy and Implementation Plan.
 - **Delayed** - The first draft of the strategy has been completed and equality checked. Members have asked for further party briefings before the strategy goes to full public consultation. Unfortunately this has had to be delayed due to extensive workloads in the unit. In particular, staff have been acting up to cover vacant posts and the MTV awards has required extensive support. Additionally there are additional major programmes being worked on (Titanic 2012, Olympics, WPF2013) above and beyond the normal workload of the unit. The project will be restarted once these resource issues ease. Event monitoring and surveys are ongoing and continue to feed into plans for 2012-13.
- Develop Council's contribution to the World Fire & Police Games.
 - **On target** - All milestones to date have been achieved, in particular, committee approved funding for the event of £400k. Our role continues on an ongoing basis to provide advice on issues such as transport and marketing.

Regenerating the city and neighbourhoods - growing the Base Rate

- Support Capital Investment to increase the city's rates base.
 - **Completed** - Mapping of Capital programme and CIF priorities, and Mapping of NR and SRF priorities has been completed.
- Deliver the Renewing the Routes Programme.
 - **Delayed** - This project has been delayed due to concerns from committee about the results from the initial evaluation and the consequent recommendations for which areas to target for improvements. Final approval for the 1st year regeneration work was subsequently provided by the August Committee. Work has commenced on the development of the detailed projects, based on the four approved plans, internally and in partnership with other agencies / owners. Ongoing processes awaiting completion in respect of required contract procurement to enable progression towards specific agreements and implementation.
- Support sectoral economic development particularly for creative industries, green businesses, advanced manufacturing and retail.
 - **On target** – We are on target to deliver business music and the associated support to local organisations. Other programmes such as the product development and business development support for companies in the digital media; film and television; music and design sectors, remain on going. Support for manufacturing businesses has been slightly delayed pending a DETI letter of offer.
- To work with other council departments to develop our integrated approach to neighbourhood working to maximise the impact of existing neighbourhood and community development work.
 - Create a Neighbourhood Investment Framework, aligned to the BCC external resourcing strategy.
 - **Moved** – this project has been moved to the SP&R committee.
 - Develop and deliver four neighbourhood regeneration projects.



- **On target** - A report was prepared and presented to SP&R. Recent staff changes mean that we need to clarify who will take over responsibility for this project.
- Work with DSD to confirm a new service delivery model.
 - **On Target** - The mapping of community grants, our assets capacity and usage has been completed. The steering group is on target to agree new approach to community development funding delivery.
- Together with Parks & Leisure Services, develop a Neighbourhood Assets strategy and commence implementation.
 - **Delayed** – This project is part of the broader corporate debate around integrated delivery at neighbourhood level and has been delayed pending the outcome of the Neighbourhood Workshop on 29th November, as part of the corporate planning process. However, some elements of the work have been completed. These include: developing a map of local need, and mapping assets (leisure centres; pavilions; parks; playgrounds; community centres/schools; churches; sports clubs' pitches etc).

1.4 Better Support for People & Communities

Developing strong neighbourhoods & supporting communities

- Champion and secure integrated support for a Community Development model for the city.
 - **On target** - The draft model has been developed and is now out for formal consultations until 11/11/11. Extensive pre-consultation was undertaken to develop the draft. A report will go to Committee in December for approval.
- Deliver new Community Development Strategy.
 - **Delayed** - Public Consultation will conclude on the 11th November. We intend to secure Council approval for the strategy in December, which makes the project 3 months behind the original timescales. These delays were caused by various factors including difficulties in securing agreement on the final draft by the Touchstone Group, difficulties scheduling a members workshop due to the Election earlier this year. In support of some of the main principles of the strategy, initial work has started in Titanic and Girdwood to demonstrate community engagement approaches. We have also started a pilot Community Development training support programme with Parks Service. Working alongside DSD we are reviewing the way in which Community Development / Infrastructure services are supported across Belfast. The Group are considering how these could be better integrated and improved to ensure that the best possible impact is made with the funds administered in this area. The draft strategy has also helped to inform the Community Support Plan for 2011-14.
- Support 70,000 volunteering hours in community facilities and develop a new volunteering framework.
 - **On target** – We continue to manage & support community centre volunteer teams and Mentor community centre volunteers. We have completed a number of actions already. These include: the planned training programme, the review of current service volunteer procedures, the volunteering health check (in partnership with Volunteer Now), and a volunteer celebration event. Volunteer hours up to the end of quarter 2 were approximately 35,000.



- Invest £840,000 in community-based advice services via 5 city-wide advice consortia.
 - **On going** – We continue to provide advice services via the 5 city-wide advice consortia as approved by Committee in Feb 2011. This will be rolled over next year as agreed by Committee in Sep 2011. Currently Deloitte is reviewing the advice model and it will be equality impact assessed as requested by Committee in Feb. 2010. We also continue to provide a responsive advice and information service on Traveller issues both internally and externally.
- Increase usage of community centres and other facilities.
 - **On going** – Most of this work is progressing as planned and the actual figures, while slightly off target, are still within tolerances. The percentage for usage (the time rooms are booked) is slightly up from last year at 64.7% while actual attendance is slightly down at 272,346. We have identified the Communication needs for each of the Community Service Units and implemented a service communications and marketing plan. However the aim to develop and implement further marketing and communications relating to individual community facilities has been delayed due to staff shortages (mainly long term sick leave). We are currently discussing options with the PBDU comms team.
- Deliver coherent inter agency and inter departmental approach to working with the Traveller community.
 - **On going** – We continue to work with partners both internally and externally (such as NAGTO, PSNI and NILGA) to support the Traveller community. We have completed a workshop to explore inter-departmental approaches to Traveller issues and gained agreements on a council-wide processes to enhance service delivery to the Traveller community. We have also completed the Traveller awareness/ anti-racism training to the Youth Forum.
- Deliver the first year actions in the BCC Framework on Tackling Poverty and Inequalities.
 - **Delayed** - The Poverty framework has been delayed but we are delivering on a number of related actions. Meanwhile the draft framework is still being considered by Members, which delays consultation and the eventual implementation. It is next due to go to Committee on the 7th November.

Create and co-ordinate opportunities for children and young people.

- Establish an inter-departmental plan for children and young people.
 - **Delayed** - Development of the CYP Framework for intervention has been slightly delayed though a Regional partnership has just been established and this will influence the shape and content of the framework. The inclusive play development programme of this work is ongoing through the Play Development Team and is being supported with project funding through the URCity2 programme with the NR partnerships. The Titanic summer scheme programme element is now complete.

1.5 Better Services

Key actions

- As part of the Community Development Framework, develop and deliver 3 community engagement pilots to maximise community ownership of and access to identified corporate initiatives.



- **On target** - Work has started in Titanic and Girdwood to demonstrate community engagement approaches. We have also started a pilot Community Development training support programme with Parks Service.
- Roll out access to CityStats across the organisation.
 - **On target** – We have completed the development and roll out of a training programme and manual with ISB. We are continuing to develop a presentation and brochure to promote the system.

1.6 Better Value for Money – An Organisation Fit to Lead & Serve

Human Resources

- Continue to demonstrate highest levels of competency through retention of independent accreditations (ISO) and attainment of IIP on a corporate basis.
 - **On target** - An internal cross department team has been reviewing the results of the mock assessment and developing an improvement plan in preparation for the next full audit. Much of the improvement work relies on the personal development plan (PDP) process and so work has been completed to make sure managers and staff are aware of how this approach benefits them and the organisation.
- Review internal communications and implement improvements as necessary.
 - **Completed** - We have completed improvements as requested by staff in our review of current communications. Improvements include introducing e-bulletins, lunchtime departmental shared learning sessions and an ongoing communications forum.

Finance, Governance and Risk

- Implement a coordinated approach to grant management through the Grant Unit.
 - **Delayed** – All issues re the categorisation of community grants have been resolved. The analysis of 2009/2010 funding has also been completed. However the recruitment of posts to bring the team up to full strength continues to be a problem.

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Belfast City Council

Report to:	Development Committee
Subject:	Review of Community Development/Infrastructure Services in Belfast/BCC Grant Funding
Date:	13 December 2011
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officer:	Cate Taggart, Community Services Manager, ext 3525 David Orr, Business Support Manager, ext 3502

1	Relevant Background Information
1.1	In early 2011 the Chief Executive chaired a series of meetings with senior officials from both DOE Planning Service and DSD in an effort to develop work streams which would help prepare for the transfer of planning and regeneration functions as set out in the Review of Public Administration proposals.
1.2	Subsequent to those discussions it was agreed that a Steering Group comprising of senior representatives from Belfast City Council, DSD Belfast Regeneration Office (BRO) and DSD Voluntary and Community Unit (VCU) would be established to oversee a review into the way in which community development and infrastructure support services were supported across Belfast.
1.3	The purpose of this work was to consider how these services could be better integrated and improved to ensure that maximum benefit is obtained from the funds administered in this area.
1.4	The project was taken forward by a joint Working Group consisting of BCC, BRO and VCU officials. The Working Group has now produced a detailed report based on the research and analysis undertaken.
1.5	The report includes an analysis of: <ul style="list-style-type: none"> i. the current levels of funding allocated to the sector from existing BCC And DSD resources by District Electoral Area ii. Physical community assets iii. The DSD and BCC administrative resources employed in supporting

1.6	community development and infrastructure interventions.
1.7	The collective notional administrative overhead costs are estimated to be at least £350k. The total funding allocated in 2011/12 was approximately £10m.
1.8	Some 121 organisations are in receipt of funding from BCC Community Services and DSD, 56 of which are in receipt of multiple funding streams which produce similar outputs and outcomes.
1.9	Currently there are 8 main funding streams in place, each supported by its own administrative processes. This leads to limited coordination, duplication and an unnecessary administrative burden on the recipient groups.
1.10	In order to address this issue the report proposed the development of a Single Funding Stream with 3 distract strands as set out in Appendix 1.
1.11	The report considers six options for the delivery of such a programme and ultimately concludes that the preferred option is the transfer of DSD funds to BCC with an interim joint management / governance structure being put in place for one year, followed by full transfer to BCC. It is envisaged that the initial transfer would take place in the financial year commencing 1 April 2013.
1.12	Before committing to the options set out in Appendix 1, the Council will wish to consider the ability of the Community Services Resource Team and the Central Grants Team within the Development Department to absorb the administration of these grants, not least the monitoring and evaluation processes which will be required by DSD.
1.12	The Council will also have to carry out the necessary due diligence with regard to the potential transfer. Issues to be considered include: public consultation; political engagement and potential conflicts of interest; framework to manage; implications of NR Action Plan; equality impact; reserves policy; legal and audit.

2	Key Issues
2.1	<p>Central Grants Team</p> <p>The Central Grants Team was set up within the Development Department as a result of recommendations from the FGS McClure Watters review in 2009 and the BCC Strategic Finance Group project which was approved by COMT in May 2010. The aim of the corporate project was to consolidate all our grant streams into 3 simple, accessible funding streams based on size of grant (small, medium and large).</p>
2.2	<p>Almost 1200 applications were funded by BCC, totalling £5m, via 600 organisations in 2009/2010. Only 30% (340) of the organisations were funded once with the other 70% in receipt of multiple funding streams potentially producing similar outputs and outcomes. One group availed of funding from 10 separate grant funding pots in 2009/2010.</p>
2.3	<p>Currently there are 23 main funding streams in place, each supported by its own administrative processes. This leads to limited coordination, duplication and an unnecessary administrative burden on the recipient groups.</p>

2.4	The project was planned to be implemented in April 2013.
2.5	<p><u>Community Development /Infrastructure Services in Belfast and BCC Grant Funding Projects</u></p> <p>Both projects are of equal merit and both meet the following principles:</p> <ul style="list-style-type: none"> - The maximisation of community benefit; - The simplification of the model to assist those seeking funding; - Ensuring value for money, especially in relation to administration; - Creating clear linkage between resourcing and need; - Putting in place strong frameworks for review and evaluation
2.6	<p>There are significant risks associated with attempting to transfer the grant administration from other areas of the Council whilst at the same time seeking to implement the recommendations within this report regarding the transfer of DSD programmes. It is recommended therefore that the Council proceed with both projects in parallel.</p>
2.7	<p>The Central Grants Team will proceed with the Corporate project which will amalgamate all small grants within the Council into 1 stream and will review and implement a single separate funding stream for Tourism Culture and Arts. The Community Support Programme grants will be removed from this project as it is part of the Community Development/Infrastructure Services transfer from DSD.</p>
2.8	<p>Should the Council agree to the proposed transfer of resources from DSD, a full project plan will need to be developed and a joint working team put in place to deliver the plan. The Community Services Resource Team will initially provide the resource and in order to assist the smooth transition it would be beneficial to have one or two members of staff seconded from DSD until the project is successfully completed.</p>
2.9	<p>Whilst working in parallel there will be areas of mutually benefiting joint working i.e.</p> <ul style="list-style-type: none"> - Grant management system; - Processes – promotion, application, assessment, monitoring
2.10	<p>This work will bring the consistency, in approach and in process, which will allow the 2 project teams to come together, possibly in 2015, following a transitional transfer period of funding from DSD.</p>
2.11	<p>A Grant Management System is a fundamental part of both projects and if this approach is approved a business case will be presented to the Corporate Governance Panel in December 2011. It is anticipated that the system will cost less than £30k.</p>
2.12	<p>The Central Grants Team and the Resources Team have limited resources and given the significant risk of progressing, as detailed above, the structures would have to be revisited urgently to establish the resources required to deliver these programmes of work recommended in this report along with the Development Department Business Support Team.</p>
2.13	<p>With regard to the Community Development / Infrastructure Services project it is proposed that the current Steering Group would oversee the project and provide the necessary governance. It is recommended that the Director of Finance &</p>

	Resources becomes a member of this Group.
2.14	The Central Grants Team will continue to report to the Strategic Finance Group.

3	Equality and Good Relations Considerations
3.1	There are no Equality and Good Relations implications associated with this request at present.

4	Recommendations
4.1	Members are asked to: <ul style="list-style-type: none"> - Note the content of the report - Give approval to officers to continue to work on this project

5	Decision Tracking
5.1	The Director of Development will present regular reports on the project to future meetings of Development Committee.

6	Documents Attached
	Appendix 1 – Proposed Single Funding Programme

6. Proposed New Programme Outline

Programme Aim

6.1 The research and analysis demonstrated a high level of commonality and overlap between current funding streams. Building upon this analysis set out below is the broad aim and structure of a new joint DSD/BCC.

AIM

"To strengthen local communities, increase community participation and promote social inclusion through the stimulation and long term strategic support of community groups, community development, community activity, capacity building and local advice services".

PROPOSED SINGLE FUNDING PROGRAMME

	Strand 1 - Capacity Building	Strand 2 - Advice	Strand 3 - Facilities
Menu of Services	<ul style="list-style-type: none"> i. Representation and participation on behalf of their membership or sector. ii. Building capacity at local level appropriate to their community. iii. Campaigning and advocacy on issues such as social justice and equality. iv. Public policy - consultation, influencing and changing public policy. v. Support for the community development process to enable people to contribute to issues which affect their lives and the communities in which they live through 	Generalist Advice including: <ul style="list-style-type: none"> i. Benefit Advice form (housing, filling, representation, etc) ii. Consumer rights iii. Debt management iv. Family Matters 	<ul style="list-style-type: none"> i. Council owned and managed facilities. ii. Community owned and managed facilities. iii. Council owned and community managed facilities.

	<p>empowerment, inclusion, equity, partnership and collective action.</p> <p>vi. Encourage collaboration between voluntary and community sector organisations.</p> <p>vii. Raising awareness and political education (e.g. equality agenda, targeting social need).</p> <p>viii. Organising network events.</p>		
Providers	Successful Consortia across the city	Advice Partnerships	Belfast City Council and Community and Voluntary Organisations
Beneficiaries	Local Residents Groups/Community Groups/Volunteers and Citizens	Local Residents	Local Residents

Based on the research findings and with reference to the strategic direction and assessment of need it is proposed that all of the current funding streams are collapsed into a single revenue programme with three distinct strands. Significant work will be required in terms of developing this outline into a coherent programme that can be delivered on the ground.

Strand 1

This strand is aimed at local consortia delivering a menu of services as detailed above. Consortia performance will be measured against a Performance Management Framework which will be developed over the coming months. This will include a range of outputs/outcomes etc. and can draw on some of the work currently being taken forward by BCC and DSD in this area.

BCC Development Staff will have an important role in terms of developing the skills and capacity of those groups delivering under this strand. The vision will be to develop and enhance the professionalism within these organisations to using the performance management framework and other tools such as the National Occupational Standards as a guide.

Strand 2

This strand is aimed at local consortia delivering general advice services as outlined above. Performance will be measured against a Performance Management Framework to be developed over the coming months and consortia will be expected to move towards a professional 'kite mark'. Input from the larger advice organisations such as CAB may be necessary.

Strand 3

This strand is aimed at supporting general overheads/running costs of those facilities delivering a range of community based programmes and again performance will be measured using an agreed set of indicators. These facilities fall within the categories outlined above. It is expected that this strand should be sufficiently flexible to enable funding of one off small revenue programmes. Those consortia successful under Strand 1 will not be able to secure funding under this strand.

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Report to:	Development Committee
Subject:	Ormeau Baths Gallery
Date:	13 December 2011
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officers:	Shirley McCay, Head of Economic Initiatives, ext 3459

1	Relevant Background Information
1.1	Members will be aware that Ormeau Baths Gallery (OBG) ceased trading on 31 October 2011. We received a telephone call informing us of this from OBG Company Secretary on 27 October. No other prior indication had been given.
1.2	We have now received a Liquidators Report for OBG, and the report indicates that there are unlikely to be any monies available for any creditors. Our Legal Department has written to the Liquidator stating our position as public funding bodies, and our legal rights to reclaim monies given through our grant. However we may be unable to claw anything back.
1.3	We issued a letter of offer to OBG in May 2011, for a grant totalling £9,523 from the Culture and Arts Development and Outreach Initiative. The project is entitled 'Artist in Residence: Markets and Donegall Pass'. The partners in the project are OBG (as lead partner), Crescent Arts Centre, Markets and Donegall Pass Community Centres, and associated user groups of the Centres. OBG do not hold any other Belfast City Council funding in this current financial year.
1.4	We issued a cheque for £4,761.50 as the first 50% payment of this grant in June. Community engagement by the artists commenced in August, and the project was officially launched by Chair of Development Committee on 13 October. We have not issued the second 50% cheque (we are not legally obliged to release any further grant due to the circumstances) and work on the project has been stalled.
1.5	The artists in residence, recruited by OBG for this project, have unpaid invoices to the value of £2,745.82 for work completed and materials purchased. They are listed as a creditor within the liquidation report, with an amount of £1,324.80 – which is the sum of two of the four invoices they submitted to OBG.

2	Key Issues
2.1	The artists are willing to continue the project, on the understanding that they receive payment for work completed and materials bought. The community groups are very keen that the project continues. The Crescent Arts Centre is willing to manage the remainder of the project and take on the lead partner role, but they have expressed strongly that they believe the artists should receive payment due before they commence any further work on the project.
2.2	There is potential for the Crescent Arts Centre to submit an application to Development and Outreach initiative for 12/13 for an enhanced version of this project utilising the same partners. Another fund available to maximise the potential of the project, is the Rolling Programme for Innovation, which could support a showcase event as a finale.
2.3	Having discussed this issue with key partners, the following options have been identified for Members' consideration: <ul style="list-style-type: none"> i. Close the project and retain the grant remaining. The project would be lost and the artists would receive no payment for work carried out / materials purchased. Belfast City Council and the artists to try to claw back money from the Liquidators. ii. Transfer the remaining budget to the Crescent Arts Centre. The Crescent Arts Centre will work with the artists and community partners to deliver a reduced project. iii. Transfer the remaining budget to the Crescent Arts Centre. The Crescent Arts Centre will work with the artists and community partners to deliver a reduced project. However an 'advance' payment will be made to the artists. £2,745.82 could be sourced from another budget within Tourism Culture and Arts. This payment would be seen as an 'advance', and, should either Belfast City Council or the artist claw back any of the grant, this money can be replaced. The project would be slightly reduced in scope but would still have a good impact within the communities. iv. Reinstate the total budget for the project. £4,761.50 to be transferred from another budget within Tourism, Culture & Arts or to be taken from Development Outreach allocation for 2012/13. Artists would be paid and project would continue as planned and completed within the timeframe.

3	Resource Implications
3.1	Depending on Option chosen, there are varying resource implications.

4	Equality and Good Relations Considerations
4.1	There are no equality and good relations considerations attached to this report.

5	Recommendations
5.1	Members are requested to consider the Options above. Option 2 is considered to be the most cost effective solution for the Council at the present time.

6	Decision Tracking
An update will be provided to Development Committee in May or June 2012.	
Timeframe:	May/June 2012
Reporting Officer:	Shirley McCay



Belfast City Council

Report to:	Development Committee
Subject:	Cathedral Quarter Trust Consultation
Date:	7 December 2011
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officer:	Shirley McCay, Head of Economic Initiatives, ext 3459

1	Relevant Background Information
1.1	Members will be aware that the Cathedral Quarter Steering Group (CQSG) was set up in 2008 by the Department for Social Development (DSD) in conjunction with Belfast City Council (BCC), Belfast City Centre Management (BCCM) and other stakeholders.
1.2	Members were presented on the 10 November 2010 with the CQSG 5 year draft Development Plan. At the Development Committee meeting of the 12 January 2011 Members agreed the draft response to the Development Plan.
1.3	In addition, as part of the formal consultation process launched on 10 March, Members on the 16 March granted authority to CQSG to meet each of the Parties for further discussion.
1.4	Members at the Development Committee of 27 September 2011 agreed that the Chairman and the Deputy Chairman (or their nominees) would represent the Committee on the Cathedral Quarter Trust.

2	Key Issues
2.1	Cathedral Quarter (CQ) is a priority place destination in the Belfast Integrated Strategic Framework and BCC has made significant investment into the area through supporting a range of arts organisations and festivals through Culture and Arts funding, infrastructure and capital funding, tourism product development and marketing.
2.2	The final CQ Development Plan to be agreed by Development Committee in December 2011.
2.3	The CQ Consultation Report attached (Appendix 1) gives an overview of the: <ul style="list-style-type: none"> - Public Consultation report on the CQ Plan - Revised Executive Summary of the CQ Plan - Summary of Public Responses, March – August 2011

	<p>The highlighted segments indicate the changes that have been made based on the recent consultation process.</p> <p>The consultation report summarises the comments and changes. The executive summary with highlights is attached to the report to show where changes were made.</p>
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3	Equality and Good Relations Considerations
3.1	There are no specific equality or good relations considerations attached to this report.

4	Recommendations
4.1	<p>Members are recommended;</p> <ul style="list-style-type: none"> - To note and endorse the CQ Development Plan submitted by the CQSG.

5	Decision Tracking
	CQ Final Development Plan will be shared for approval in December 2012.

6	Key to Abbreviations
	<p>CQ - Cathedral Quarter CQSG - Cathedral Quarter Steering Group DSD - Department for Social Development BCC - Belfast City Council ACNI - Arts Council Northern Ireland DCAL - Department of Culture, Arts and Leisure NITB - Northern Ireland Tourist Board DETI - Department of Enterprise, Trade and Investment BCCM - Belfast City Centre Management BVCB - Belfast Visitor and Convention Bureau</p>

7	Documents Attached
	Appendix 1 – CQ Consultation Report

Cathedral Quarter Consultation Report

November 2011

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Summary of Public Responses, March – August 2011	14

Public Consultation on the Cathedral Quarter Plan

Over the past two years, the Cathedral Quarter Steering Group (CQSG) has engaged local stakeholders both within and beyond the Cathedral Quarter at key points in the development of the Cathedral Quarter Development Plan. Consultation has included workshops, presentations, debates, surveys and one-on-one meetings to help determine priorities for the area. The members of CQSG represented sectoral interests as well as the interests of their individual organisations.

Since its inception, CQSG has included representatives from:

Barnabas Ventures
Belfast Cathedral
Belfast Circus School / Festival of Fools
Belfast City Council, Development Department
Community Arts Forum
Department for Social Development
Kabosh Theatre Productions
The MAC
MCE Public Relations/Royal Exchange Ltd.
The Merchant Hotel
New Belfast Community Arts Initiative
Ulster Architectural Heritage Society
University of Ulster
Belfast City Centre Management

Consultation sessions were held in Cathedral Quarter throughout the process of drafting the Cathedral Quarter Plan. In addition to the extensive contribution made by CQSG members, feedback was received from the following stakeholders:

ASM Horwath	Hoffman Patterson Solicitors
Artery NI / RBG Arts Group	JK Pubs Ltd
Arts & Disability Equality Charter	Libraries NI
Arts Ekta	Macaulay & Ritchie
Bbeyond	Malmaison Hotel
Belfast Cathedral	NI War Memorial
Belfast Exposed	NITB
Black Box	No 27 Restaurant
Botanic Inns, Ltd	Northern Visions
Catalyst Arts	Oh Yeah Music Centre
Cathedral Eye Clinic	Paperjam Design
Cathedral Quarter Arts Festival	Premier Inns
Craft NI	Ps2 Gallery
Dance Resource Base	SHAC Housing Association / Residence
Duke of York	State of Search - Artist
Edwards & Co Solicitors	St. George's Church
FAB (Forum for Alternative Belfast)	The John Hewitt
Golden Thread Gallery	The Northern Whig
Helm Housing	Todd Architects
Hill Street Brasserie	WWF

The initial consultation sessions covered a broad range of issues in response to general questions about Cathedral Quarter, what needed to be improved, and what changes respondents hoped to see in the future. Issues that needed to be addressed included:

- Cleanliness
- Communication / Coordinating creative activity
- Level of consultation
- Security
- Accessibility - physical, access to information, clear language
- Public art
- Public toilets and other amenities
- Branding – visibility
- Signage – Legibility
- Need for more public performances
- Sunday activity level
- Lighting
- Need more residential

As the Development Plan started to take shape, further consultation sessions were held to ask stakeholders to comment on its direction. Feedback was overwhelmingly supportive of the Plan, and included a strong call for a body to take the Plan forward and specific actions with a timeline for implementation.

The first full draft of the Plan was submitted to BCC Development Committee and BCCM in September 2010. CQSG received extensive feedback from the BCC Development committee with a strong recommendation to put the Plan out for wider public consultation. Belfast City Centre Management (BCCM) was consulted over several sessions and responded with a call for greater emphasis in the document on partnership working.

In the draft Plan, CQSG calls for the establishment of a Cathedral Quarter Trust to drive further development of the area as a *‘welcoming cultural quarter in the city centre based on equity, diversity and interdependence for all cultural traditions’*. The proposed Trust’s four strategic priorities will be:

- To support the Cathedral Quarter as a centre for the arts and creative industries
- To support the growth of the mixed-use economy in Cathedral Quarter
- To generate high levels of public participation
- To build and maintain a supportive infrastructure

Membership of the Cathedral Quarter Trust (CQT) will be open to organisations, businesses and residents located within the geographic boundary of Cathedral Quarter as outlined in the CQ Development Plan. Member and non-member Trustees will include representation from the following:

- CQ Stakeholders to include Arts (6), Business (4) Heritage (1) Cathedral (1), University of Ulster (1) Local Resident (1)
- DSD (1)
- BCC – Development. Committee Chair & Deputy Chair or designees (2)
- ACNI/DCAL (1)
- DETI (1)
- BCCM (1)
- BVCB (1)

The Steering Group felt it was important to publish the draft Plan complete with illustrations, maps and images in order to give a more complete picture of the initiative. The comments from the Development Committee and BCCM were incorporated prior to publication. The draft Plan was launched by DSD Minister Alex Attwood in March 2011 and distributed to a range of statutory and community organisations across the city.

From March to September 2011, CQSG met with the following representative bodies and experts:

Belfast City Centre Management
Arts Council of Northern Ireland (ACNI)
DoE – Planning Service
East Belfast Partnership
North Belfast Partnership
South Belfast Partnership
West Belfast Partnership

Ballynafeigh Community Association
Belfast Civic Trust
Belfast Interface Project
Gaeltacht Quarter
Titanic Quarter
Arthur Acheson, architect

Responses were largely supportive of the Cathedral Quarter Plan and the formation of the Cathedral Quarter Trust. Further amendments were made to the Plan's objectives and key targets to reflect the Cathedral Quarter's commitment to the important issues raised.

- Substantive comments were received emphasising the importance of strong links and working relationships between the Trust and other communities and Quarters in the City to promote social inclusion and information sharing:
 - Objective 1.3 now includes a target of *'Formal links with other city quarters and creative industries clusters through the establishment of a city quarters forum'*.
 - Objective 3.2 now includes key targets of *'Regular consultation with local communities through establishment of a communities forum'* and *'Increased community awareness of opportunities for sharing knowledge and information'*.
 - Objective 4.3 now includes a key target of *'Strong pedestrian linkages between Cathedral Quarter and neighbouring communities'*.
 - Objective 4.4 now includes a key target of *'A variety of public transport options including night buses and shuttle buses to encourage access'*.
- In response to calls for greater emphasis on cultural tourism:
 - Objective 3.1 was amended to include a key target of *'Promotion of the cultural tourism opportunities offered by Cathedral Quarter in partnership with existing tourism bodies'*.
- In response to calls for more information in general and use of Irish language signage in particular:
 - Objective 3.1 was amended to include a key target of *'Creative use of inclusive media for signposting and information'*.
- In response to calls for greater emphasis on the significance of and need to influence the University of Ulster's plans for the Belfast Campus:
 - Objective 2.3 has been added – *'Full support for the objectives of the North East Quarter Masterplan and for the University of Ulster's intention to relocate to the city centre'* and includes the following key targets:
 - *Raise public awareness of the long-term significance of these developments for Belfast*
 - *Engage with government, developers and all relevant stakeholders*
 - *Explore opportunities and risks with stakeholders and contribute a Cathedral Quarter perspective to the planning process*
 - *Assist in developing long-range plans to ensure integration*

Cathedral Quarter Belfast Five-Year Strategic Vision and Development Plan 2012 – 2016

January 2012

Foreword - tbc

Preface

The Cathedral Quarter Steering Group (CQSG) is a stakeholder-led initiative, which brings together key local participants to take stock of the Cathedral Quarter's development, analyse successes and failures, and propose solutions to achieve the best outcomes. CQSG includes representation from a mix of sectors and interests, including business, leisure, the public sector, and the arts. The group puts into practice the principles of place-shaping by engaging local people and harnessing their expertise to develop this important resource for the city.

Since its inception, CQSG has included representatives from:

Barnabas Ventures, Mark Finlay,
Belfast Cathedral, Ken Patterson,
Belfast Circus School / Festival of Fools, Will Chamberlain
Belfast City Council, Carolyn Mathers, Shirley McCay
Community Arts Forum, Heather Floyd
Department for Social Development, Carol Ramsey (advisory)
Kabosh Theatre Productions, Paula McFetridge
The MAC, Anne McReynolds
MCE Public Relations/Royal Exchange Ltd., Paul McErlean, CQSG Chair
The Merchant Hotel, Sorcha Wolsey,
New Belfast Community Arts Initiative, Conor Shields
Ulster Architectural Heritage Society, Rita Harkin,
University of Ulster, Kerstin Mey, Peter Walker, Alastair Adair
Belfast City Centre Management, Andrew Irvine, (advisory)
Cathedral Quarter Development Manager, Belfast City Centre Management, Patricia
Freedman, (staffing)

Executive Summary

The Cathedral Quarter Steering Group (CQSG) was formed in 2008 to analyse issues and opportunities and create a plan for the development of the Cathedral Quarter. CQSG includes a unique mix of local and government stakeholders. The group's mission is to develop the Cathedral Quarter as the thriving hub of Belfast's cultural life.

Vision for the Future

Belfast's historic Cathedral Quarter is a focal point and leading destination for culture, enterprise and learning

CQSG has examined the Cathedral Quarter's enormous potential add to the cultural and economic vitality of the city. Public spaces and venues host performances and visitors from near and far. Creativity, innovation, learning, enterprise and hospitality combine with an historic setting and exciting new developments to form the building blocks for a world class cultural quarter

Throughout the development of this plan CQSG has asked the question: "What needs to happen next?" Each strand of activity presents unique challenges and opportunities. As Belfast's city centre cultural hub, the Cathedral Quarter is ideally placed to embrace and celebrate Northern Ireland's cultural diversity. **CQSG aspires to develop the area as a welcoming quarter that is committed to a "shared and better future" based on equity, diversity and interdependence for all cultural traditions.** Strong partnerships across sectors are needed to balance interests and realise our aspirations for a shared future.

CQSG calls for the establishment of a Cathedral Quarter Trust (CQT) to work with and on behalf of the Cathedral Quarter community, statutory stakeholders and the public to focus on strategic opportunities and implement the Development Plan.

We propose that membership of CQT will follow the model of the steering group, which has worked well. CQT will include a maximum of 21 members:

- CQ Stakeholders – to include Arts (6), Business (4) Heritage (1) Cathedral (1), University of Ulster (1) Local Resident (1)
- DSD (1)
- BCC – Dev. Cmte Chair & Deputy Chair invited (2)
- ACNI/DCAL (1)
- NITB/DETI (1)
- BCCM (1)
- BVCB (1)

CQT will:

- Be the forum for all stakeholders to work in partnership on an on-going basis
- Work in conjunction with the Department for Social Development (DSD), Department of the Environment (DoE), Belfast City Council (BCC), Belfast City Centre Management (BCCM), Belfast Visitor and Convention Bureau

(BVCB) and other agencies and departments to address the particular needs of the area

- Leverage funding, including external resources not available to government
- Manage the Cathedral Quarter’s event funding and dedicated workspaces
- Facilitate the efficient delivery of services in partnership with existing providers
- Implement the Cathedral Quarter development strategy

The Cathedral Quarter Development Plan

In guiding the future development of the Cathedral Quarter the four key priorities of CQT will be:

- To support the Cathedral Quarter as a centre for the arts and creative industries
- To support the growth of the mixed-use economy in Cathedral Quarter
- To generate high levels of public participation
- To build and maintain a supportive infrastructure

The Cultural Heartbeat

Priority 1: To support the Cathedral Quarter as a centre for the arts and creative industries

The Cathedral Quarter can become a major driver of economic, social and cultural change in the city and the region. From the creation of new artistic work to the running of a successful creative business, these activities are crucial to the knowledge economy which will foster growth in the future.

A renewed and focused commitment to creativity and excellence is needed to enable our community of artists and creative practitioners to produce outstanding work. Developing the Cathedral Quarter as Belfast’s cultural hub will require public and private investment to support a full calendar of events, appropriate venues, the development of creative industries and adequate managed workspace provision. **CQT will support the development of the arts and creative industries in Cathedral Quarter and explore ways to connect to initiatives in communities beyond the Quarter.**

Objective 1.1:

Secure long-term strategic commitment from policy-makers, funders and investors for the development of a full calendar of events and activities
(p.25)

Key Targets to include:

- DSD funding for the Laganside Events Fund in the short term
- A larger Cathedral Quarter events fund with support from multiple funders at increased levels
- Increased use of public space for cultural activities
- The development of additional high-profile events such as Culture Night and a Craft Market
- Distribution of funding by the Cathedral Quarter Trust to meet the strategic priorities of the area

Objective 1.2:

Stimulate public and private investment for

Key Targets include:

- Sustained operation of the Black Box as a crucial cultural venue

venues (p25)

- Support for The MAC commensurate with the shared aspiration for a world-class home for the arts in the Cathedral Quarter.
- Civic and cultural use of the Assembly Buildings (Northern Bank)
- On-going development of the Oh Yeah Music Centre

Objective 1.3:

Promote the clustering of creative and cultural industries (p.26)

Key Targets include:

- CQT as a consultee to relevant strategies
- Formal links with other city quarters and creative industries clusters through the establishment of a city quarters forum
- Funding for creative industries development to include a programme of business incubation, mentoring and support
- Government recognition of the importance of creative industries in the Cathedral Quarter
- A 15% increase in the number of creative and cultural organisations and businesses located in Cathedral Quarter

Objective 1.4:

Expand and renew the Managed Workspace provision (p.26)

Key Targets include:

- New selection criteria and tenancy agreements for a sustainable balance of non-profit organisations and creative business incubation
- Full occupancy of existing buildings
- Ownership in trust of the existing Cathedral Quarter managed workspace buildings
- Purchase of additional managed workspace to meet the needs of the cultural quarter
- Long-term, effective management of the workspaces

*A Quarter for all Reasons***Priority 2: To support the growth of the mixed-use economy in Cathedral Quarter**

The dynamic mix of uses with cultural activity at the core sets the Cathedral Quarter apart as one of Belfast's most exciting places to work, visit and live. The interaction of diverse and competing interests creates opportunities and challenges. Finding the balance that will enable the mix while enhancing its distinctive character will take strong management and collaborative partnerships. The key challenge will be to ensure that arts, business, education and community interests maintain a presence and have opportunities to add value.

*Objective 2.1:****Attract investment*** (31)*Key Targets include:*

- Capital investment for expansion of the managed workspace provision
- Establishment of a Cathedral Quarter Business Improvement District (BID)
- Incentives for independent retail and active ground-floor use
- A presence in local and regional economic deliberations
- Showcase Cathedral Quarter in local and international conferences and events

*Objective 2.2:****Balance public and private land use to meet the needs of the cultural quarter*** (p.33)*Key Targets include:*

- Zoning for the Cathedral Quarter to include requirements for active ground floor use, servicing hours, agreed ratio of public to private and arts to non-arts use
- Town Centre Living Initiative Area designation to be eligible for Living Over The Shop (LOTS*) grants and raised awareness of existing tax incentives (*a Housing Executive town centre living initiative which assists landlords to adapt upper floors for residential use)

*Objective 2.3:****Full support for the objectives of the North East Quarter Masterplan and for the University of Ulster's intention to relocate to the city centre*** (p. 64)*Key Targets include:*

- Raise public awareness of the long-term significance of these developments for Belfast
- Engage with government, developers and all relevant stakeholders
- Explore opportunities and risks with stakeholders and contribute a Cathedral Quarter perspective to the planning process
- Assist in developing long-range plans to ensure integration

*Going Public***Priority 3: To generate high levels of public participation**

The Cathedral Quarter offers a variety of opportunities to develop a greater sense of shared culture and shared space in the heart of Belfast. Our aim is to exceed the expectations of both residents and visitors for pleasant and welcoming experiences through effective management of information, appropriate marketing and pro-active engagement with local communities.

Objective 3.1:

Provide local residents and visitors with news and information about the Cathedral Quarter
(p.38)

Key Targets include:

- Promotion of the cultural tourism opportunities offered by Cathedral Quarter in partnership with existing tourism bodies
- A high profile in tourism marketing
- An interactive Cathedral Quarter website
- Strong media presence featuring Cathedral Quarter organisations, events and activities
- Creative use of inclusive media for signposting and information

Objective 3.2:

Involve local community groups in Cathedral Quarter activities
(p.40)

Key Targets include:

- Regular consultation with local communities through establishment of a communities forum
- Increased awareness of the work of Cathedral Quarter organisations in local communities
- Increased community showcasing in Cathedral Quarter events
- Shared celebration of cultural diversity
- Greater community access to activities and events
- Increased community awareness of opportunities for sharing knowledge and information

Objective 3.3:

Improve people's experience of working, visiting and living in the Cathedral Quarter
(p.41)

Key Targets include:

- Active forums for discussing and resolving issues of shared concern
- Adoption of visitor servicing goals by Cathedral Quarter stakeholders
- Visitor information point(s) in the Cathedral Quarter

Objective 3.4:

Promote best practice to ensure maximum accessibility to Cathedral Quarter premises, public spaces,

Key Targets include:

- Accessibility as a priority in all development initiatives
- Readily available accessibility information
- Raised awareness of accessibility issues specific to the Cathedral Quarter

*services and activities**(p.41)**Shaping the Space***Priority 4: To build and maintain a supportive Infrastructure**

A re-purposed, modernised and well-maintained infrastructure will firmly establish the Cathedral Quarter as an inviting, sustainable and productive environment. Traffic and parking must be managed to meet the city's strategic objectives and to ensure access for everyone.

The Cathedral Quarter's built environment, including its historic buildings, squares and public spaces, narrow streets and laneways, not only add character and authenticity to many public activities, but also function as part of the working cultural quarter. The public realm must be designed and maintained to a standard consistent with its role as meeting place, venue and historic cultural space.

Objective 4.1:

Ensure a well-functioning public realm through effective local management (p46)

Key Targets include:

- Reduced crime and vandalism and greater safety
- Improved procedures for:
 - policing, security and dealing with anti-social behaviour
 - street cleansing and rubbish collection
 - maintenance of lighting, signage, street furniture and underground services
- The inclusion of waste storage facilities with adequate access in any new development
- Servicing policy for goods delivery vehicles
- Traffic regulation order to manage vehicular access

Objective 4.2:

Develop and enhance public space and streetscapes (p.47)

Key Targets include:

- More arcades and canopies for public spaces and shopping areas
- Distinctive signage, street lighting and street furniture to reinforce the identity of the area
- Information points and other public amenities
- Recognisable gateways to the Cathedral Quarter
- A streetscape plan for Donegall Street
- Appropriate public space to enhance the Cathedral setting and the new Belfast Campus of the University of Ulster (UU), and the Four Corners at the intersection of Waring, Donegall, Bridge and North Streets
- A programme of seasonal enhancements

Objective 4.3:

Improve access for pedestrians and cyclists and calm the traffic

Key Targets include:

- Strong pedestrian linkages between Cathedral Quarter and neighbouring communities

(p.50)

- The introduction of controlled junctions at major pedestrian and cycle access points
- Installation of cycling lanes and bike racks
- The introduction of a right turn from Talbot Street to Dunbar Link
- Designation of adequate taxi stands and tour bus parking
- The re-routing of long-range commuter buses and through traffic from Donegall Street to Dunbar Link
- The redevelopment of Dunbar Link as a 'boulevard' in line with the Belfast Metropolitan Area Plan (BMAP)

Objective 4.4:
Improve access by public transport (p.52)

Key Targets include:

- Cathedral Quarter / University of Ulster train station at Gamble Street
- A variety of public transport options including night buses and shuttle buses to encourage access

Objective 4.5:
Implement best practice in heritage-led regeneration (p.54)

Key Targets include:

- Increased public awareness and celebration of the area's historic buildings and streetscapes
- Creative re-use of historic buildings
- "Living Over the Shops" in the empty upper floors of historic buildings
- High quality new developments where the opportunity exists, which respect the existing form and scale

Conclusion

Political will and joint efforts in the face of intense economic and political pressure will be required to deliver the strategic benefits that the Cathedral Quarter can bring to the city. These efforts need to be underpinned by a strong belief in the importance of culture to our quality of life and the contribution of creative and cultural activity to our economy.

Dedicated local management, in partnership with existing service providers, will sustain the momentum of Cathedral Quarter development over the next five years and into the future. CQT will bring a focused approach to development and will have access to opportunities and resources not available to government. Private/public sector financial models to support the development of the Cathedral Quarter will be fully explored.

And as a presence in Cathedral Quarter CQT will have particular opportunities to strengthen relationships and promote new ways of working. CQSG is mindful of the

complexity of establishing the Trust. Potential structures are under review and will be developed and agreed in partnership with key stakeholders.

Our aspirations will be strengthened in the coming months by the development of a short, medium and long-term implementation plan where the key targets will be SMART – specific, measurable achievable and time bound.

This plan has been developed in consultation with the Cathedral Quarter community, stakeholders with a direct interest in the area, representatives from surrounding communities and the general public.

Summary and Selected Comments from the Public Consultation March-Aug 2011

Copies of original responses available on request

1. Do you agree that a vibrant cultural quarter in the city centre can bring economic and social benefit to Belfast?

ACNI: welcomes the Plan and the focus it brings; contribution to cultural infrastructure of city; bringing together public and private sectors to build on physical, social and cultural achievements of the past.

Ballynafeigh Community Association: Absolutely - if developed in partnership with all stakeholders and if supported and sustained by political leadership.

Belfast Civic Trust: Yes, agrees with comments and principles; Library area and Royal Ave area should be encouraged to have UU accommodation above shops.

Belfast Interface Project: Yes. It is especially needed in Belfast. The Cathedral Quarter has increasingly become a space where all sections of the community feel welcome and able to participate. The 'shared space' has evolved here in a natural and dynamic way. There is great potential to build on this with the opening of new resources like The MAC, and the further development of events like the Festival of Fools, Culture Night, and City Council-sponsored celebrations in Custom House Square. These are seen as non-elitist events and have proved very successful in bringing people into the CQ from parts of Belfast where there is not a big uptake of city-based cultural events.

DoE Planning Service: Yes

East Belfast Partnership: Yes we agree and initiatives such as the proposed Cathedral Quarter Strategic Development Plan are vital for the rejuvenation of the riverside area and enhance the wider Belfast cultural and tourism offering. Critical for success will be its ability to link effectively with the adjacent communities and ensure that it is a welcoming and accessible place for people living in all parts of the city. It should be developed carefully to ensure it adds value to the existing cultural offer in the city and doesn't displace this. The UU plans could have a significant impact on this so early consultation with them we would suggest is vital. EBP would be keen to see the final strategy include specific reference to ways to support existing creative industries based in, and supporting, local communities by connecting them in where possible to the offer in Cathedral Quarter.

Gaeltacht Quarter: Yes. We are keen to work with Cathedral Quarter and to encourage linkages between Gaeltacht Quarter and Cathedral Quarter.

North Belfast Partnership: CQ offers opportunities for a strong focal point for social and economic growth for the city and surrounding communities. Additionally, CQ provides wider connections and cultural corridors to other parts of the city.

South Belfast Partnership: We believe that a strong Cathedral Quarter will make a significant contribution to the regeneration of Belfast's City Centre and consequently for the rest of the City. We therefore welcome the proposals in broad terms and look forward to seeing the plans begin to come to fruition during the next few years.

Titanic Quarter: We support the regeneration of CQ and recognise the fully the importance of the Arts and Cultural Sector in driving forward commercial and sustainable projects.

West Belfast Partnership: Yes. The West Belfast Partnership supports the development of the Cathedral Quarter and encourages the establishment of more formal links between the emerging quarters of the city, such as the Gaeltacht Quarter.

Arthur Acheson, architect: There is no doubt about this and the interesting fact that people have heard of Cathedral Quarter but can leave the city without being able to 'find' events is distressing.

2. Do you agree with the four strategic priorities of the Cathedral Quarter Plan?

ACNI: The Plan will assist CQ being utilised to full potential; will contribute to wider cultural and tourism objectives; stimulating creativity and innovation within NI's creative industries and promoting collaborative activities will encourage knowledge exchange and create new market opportunities.

Ballynafeigh Community Association: Yes

Belfast Civic Trust: Yes

Belfast Interface Project: Yes. The 3rd and 4th aims will be essential for making this plan viable and sustainable.

DoE Planning Service: Yes

East Belfast Partnership: The strategic priorities are quite comprehensive and recognise the needs of the location. We would suggest that the word 'centre' could be replaced by 'central focus' – this would reflect that arts and creative industries are also located elsewhere such as, Forbairt Feirste, the University area and Titanic Quarter (the Science Park and Paint Hall). We welcome your emphasis on encouraging accessibility of space and supporting local communities and particularly supported your reference to community showcasing opportunities. The issue of access to the city centre is being addressed by a number of organisations and local groups; these include Belfast City Council, DSD, the Area Partnerships, the Forum for Alternative Belfast and various local community groups. It would be important to be aware of other plans, particularly where there are proposals to improve access i.e. additional pedestrian links across the Lagan and support these where it is of mutual benefit. It is our experience that people are happy to travel to the city centre for events if they are well publicised in local areas, use inclusive language and do not appear to be elitist and are affordable and value for money. Securing involvement from outlying communities will be easier if Cathedral Quarter Belfast can form strong links with local groups and are perceived to be complementing the local offer and not displacing it. Cathedral Quarter Belfast could offer occasional support for other event providers locally at little cost – things like marketing advice, masterclasses on organising events for community groups.

Gaeltacht Quarter: Yes

North Belfast Partnership: Fully agree with the strategic priorities - More emphasis needed on space for culture/arts - creative and social industries. Must maintain balance between what's on offer - entertainment and culture - need to free up street level space for cultural draws.

South Belfast Partnership: We would highlight the importance of ensuring the Cathedral Quarter remains a Quarter for all of the City. To this end, we would urge the Cathedral Quarter Steering Group to give consideration to the connectivity to each area of the City,

including South Belfast, particularly in terms of access to leisure facilities and festivals / events, etc.

West Belfast Partnership: The West Belfast Partnership has identified creative industries as a key growth area and is involved in driving this forward both locally as well as with our partners in the other Belfast Area Partnerships. The Cathedral Quarter has a range of arts and creative businesses and is certainly an important cluster within the city. We acknowledge and support the development of the creative industries across the city and would like to see a focus on promoting collaboration among creatives across the city as well supporting business development and access to wider markets.

3. Do you think CQSG should consider any other strategic priorities?

ACNI: ACNI suggests highlighting the role of Cultural Tourism under Priority 3, Objective 3.1

Belfast Civic Trust: *Objective 1.1* Culture Night more than one night; Craft market augmented by St Georges market Traders; Market in Writers Square or Donegall St. *Objective 1.2* Reuse of Custom House for Arts or Gallery; Encourage UU accommodation in CQ; *Objective 2.2* - Encourage UU housing and arts facilities in area inc. Library Quarter and Gresham street area. *Objective 4.2* - Initiate a policy against tall buildings in CQ and adjacent thereto (n.b. present planning application for development adjacent to McHughs); Identify key sites for development eg along Dunbar link and Waring street and Talbot/Hill (possible residential); Initiate shutters policy ;Initiate shop front competition; More attractive events barriers on CHS; Belfast Civic Trust to participate in design forum. *Objective 4.3* Support priority development of Dunbar Link as a boulevard. *Objective 4.5* - Redevelopment of River house with a lower building in line with High Street street scape; New traditional architecture recognised as a valid contribution to streetscape; Reuse of Custom House as arts or Gallery.

Ballynafeigh Community Association: Inclusivity of mixed economy model; architectural heritage and regeneration; peacebuilding priorities

Belfast Interface Project: No

DoE Planning Service: No

East Belfast Partnership: The BCC Tourism Framework prioritises events and festival activity and the need to push emphasis from the city centre to the surrounding communities and we would be keen to see this approach mirrored where possible in the strategy. The Culture Strategy 2012 – 2015 and the Festivals Charter are also important documents to reflect in your plans as they also have been widely consulted on. We would suggest that you could ‘beef up’ your objective on ‘building and maintaining a supportive infrastructure’ to include your contribution to the broader regeneration of the area. The relevance of supporting the North East Quarter Masterplan is mentioned in Priority 2. It could be helpful and important to influence ideas around the UU plan to relocate and introduce new physical and social infrastructure into the area and the York Street Interchange plan.

Gaeltacht Quarter: Develop links with other areas. We would like to see Irish used in signage etc in the Cathedral Quarter not only in relation to linking to Gaeltacht Quarter but in other aspects of your work as well.

North Belfast Partnership: Develop concept of Quarter for City / Quarter for Community - connections need built and maintained with communities and schools to promote shared quarter / culture and education.

South Belfast Partnership: There are significant synergies between the Cathedral Quarter and South Belfast, particularly in relation to the arts and culture, and the creative industries.

West Belfast Partnership: No

Arthur Acheson: To work in a collegiate and neighbourly manner with nearby “urban villages” in the city centre and beyond

4. Would you support the establishment of a Cathedral Quarter Trust to implement the development plan?

ACNI: ACNI concurs with need to establish CQT. Unclear who the stakeholders of CQT will be. ACNI recommends they be identified in the document. Suggests inclusion of DETI.

Ballynafeigh Community Association: Yes, but would have some concerns regarding the management and governance of this body- ie: ensuring adequate representation, models of good practice, etc.

Belfast Interface Project: Yes. An accountable body based in and made up of the Cathedral Quarter ‘community’ will be best placed to develop the potential of the CQ.

DoE Planning Service: Yes

East Belfast Partnership: This appears to be a good idea but as suggested can be complex.

Gaeltacht Quarter: Yes

North Belfast Partnership: For sure a Trust is a valuable vehicle as long as its aims and objectives are clear!

West Belfast Partnership: The West Belfast Partnership would support the development of a trust to implement the development plan and suggests that the emerging Trust considers community representation. In addition, there has been a great deal of publicity as well as debate as to the impact (both positive and negative) of the Temple Bar Cultural Trust as it celebrates its 20th anniversary. Perhaps it would be worthwhile to engage with Temple Bar for advice, lessons learned and pitfalls to avoid.

Arthur Acheson: I believe we need proper and permanent governance in all our villages, including the urban villages. These places should be recognised for their individuality and should have modest continuous funding allocated to them. If the number of council officials in Belfast were to be allocated to the places of the city there would be about 50 people working in each electoral ward area. Even half of these resources would be amazing if they became focussed on each place rather than on subject areas which often overlap and underlap in each place. So, let’s have a Ward Mayor in Cathedral Quarter.

5. Do you agree with the initial aims of the Cathedral Quarter Trust as stated above?

ACNI: Yes in consideration of comments to question 4

Ballynafeigh Community Association: Yes

Belfast Interface Project: Yes. Belfast Interface Project has a particular interest in the issue of the management of the workspaces, as a tenant in the Cathedral Qtr Managed Workspace on Royal Ave. We’d like to see them fully occupied, by non-profit organisations and arts organisations and businesses, and managed in their interests. As an organisation whose

membership is made up of community groups from across Belfast, BIP welcomes the Strategic Plan's objective of involving community groups in CQ activities.

DoE Planning Service: Yes

East Belfast Partnership: Yes

Gaeltacht Quarter: Yes

North Belfast Partnership: Yes! However, CQT would need to prioritise role Trust will undertake to promote Strategy - Hardware / Software issues - Physical space / Leisure and residential vs shared space - /cultural/social/business.

West Belfast Partnership: Should the Trust consider the support of arts and culture as part of its aims? Or is it enough that this is part of the implementation of the Cathedral Quarter strategy?

Arthur Acheson: Maybe Cathedral Quarter should be supporting a bid for a BID (business improvement district) where I understand new legislation is needed in Northern Ireland to allow the majority of rate payers in a defined area to agree to a higher rate and to then be able to spend the rate increase on specific improvements to the area.

6. Who do you think should be represented on the Trust?

ACNI: BCC, NITB, representatives of small cultural organisations working in the area e.g. The MAC, representatives of the private sector.

Belfast Civic Trust: Belfast Civic trust to participate in design forum.

Belfast Interface Project: The work to date has clearly been based on a model of inclusion, cooperation and relationship building, over many years, and the same approach will be needed when establishing the Trust. The Trust will need to be representative of the CQ and also responsive to the CQ community, while focussed on the four priorities of this Strategic Plan.

East Belfast Partnership: In our experience these decisions are best taken as the project progresses – to reflect the skills and influence required at each stage. That said, we believe that while all the key interests are required to be well connected to the Trust this does not necessarily mean that have to be members.

Gaeltacht Quarter: Whoever will drive it.

North Belfast Partnership: Key Public Agencies / Funders / Policy groups. Promote Sector and Belfast Area Partnerships (BAPs) should be on the Trust due to complementarity of strategic priorities.

South Belfast Partnership: We would welcome the opportunity to work with you, where appropriate, to ensure these two vibrant areas of Belfast continue to complement each other and avail of any joint opportunities"

West Belfast Partnership: In addition to the suggested stakeholders the Department for Culture, Arts and Leisure should probably be involved since they have policy responsibility for the creative industries. The Trust will need representation from local communities—perhaps through the local residents and those surrounding communities that are impacted by developments in the Quarter.

Arthur Acheson: I think that if there is to be a Trust, it should be a pilot project for integrated (urban) village governance in Northern Ireland. The Trust should therefore be elected. The closest models to my suggestion are the Scottish Community Councils which are independent but recognised by statute. English Community Councils (sometimes called Parish Councils) would be the equivalent. There are over 10,000 of these. I understand that people are elected to them at the same time and by the same process as Council elections. Although it seems a long time away, it would be timely to have this organised for the 2015 elections.

7. Would you like to make any other comments?

Belfast Interface Project: The Cathedral Quarter Development Plan is making a contribution to this vision by creating a shared space that is welcoming to and reaches out to all. We very much welcome that contribution. Our hope is that, in its implementation of the Development Plan, the Cathedral Quarter Steering Group will show that it shares our vision for the City through promoting positive creativity and outreach work in exploring and addressing issues relating to the legacies of conflict and division within the City and our common humanity. Thank you for your great work!

East Belfast Partnership: We look forward to seeing the plans develop and wish to offer our support for future ventures.

Gaeltacht Quarter: We wish you well with the next stage of your work.

North Belfast Partnership: North Belfast Partnership welcomes the opportunity to work with CQ and improve connection with North Belfast and surrounding communities - to create cultural links / educational and social economy benefits. Jointly work to engage on UU connections and benefits.

West Belfast Partnership: The following points were raised at the West Belfast Partnership Board meeting on the 10th of May 2011:

- It is important to repopulate the city centre. Housing/social housing and student accommodation are important to repopulating the city centre. Therefore, it is important that there is ongoing engagement in relation to housing with the University of Ulster as they move to the Quarter.
- It was noted that the Cathedral Quarter has aspirations to provide training opportunities and are presently trying to pull together information about the many opportunities already available in the area. The West Belfast Partnership has a Education and Training Forum and fruitful links could be made between the two organisations in relation to training.
- The Board noted that there would be opportunities to work together on developing the creative industries, which has been identified as a growth area for the city.

Arthur Acheson: Free buses and trains instead of underground parking.....

There are many reasons why public transport should be free at the point of use:

1. There is a pressing urgency for severely disadvantaged people to gain access to employment opportunities through training schemes; at present these unemployed people simply cannot afford the bus / train fares to go for training. This is a public disgrace.

2. The resulting additional use of buses and trains by current car users, increasing overall efficiency of the road network, resulting in lower levels of congestion and lower carbon dioxide emissions, will help to meet a significant target in the programme for government;

3. The wider benefits include changing habits and thereby reducing the medium and long term need for expensive road schemes;

4. Vast amounts of land in our urban centres are taken up with major road schemes, land reserved for major road schemes and surface parking to facilitate users of private cars. Significant areas of valuable land could be released to allow us to create better places, making our towns and cities more pleasant places to live and work in – and to visit.

5. Overall efficiency in public transport improves through eliminating resource costs of ticketing, fare collection, etc.

6. The proposal would invoke delight among tourists who would enjoy their visits to Northern Ireland to a greater degree, resulting in additional repeat visits, overnight stays and tourist spend, particularly as word spreads in tourists' home countries of the extra attraction of coming to this part of the world.

7. Consideration of the figures presented in the DRD's 2010-2011 Review of the Regional Development Strategy indicates that in Northern Ireland we spend over 97% on private transport costs and under 3% on public transport fares.



Belfast City Council

Report to:	Development Committee
Subject:	Belfast Rapid Transit Proposals – Public Consultation
Date:	13 December 2011
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officer:	Shirley McCay, Head of Economic Initiatives, ext 3459

1	Relevant Background Information
1.1	The Department for Regional Development (DRD) launched the Public Consultation on the route options for the Belfast Rapid Transit project on the 12 October 2011 for a three month period ending on the 6 January 2012.
1.2	In 2007, DRD commissioned transport consultants to undertake a feasibility study looking at possible routes and technologies for rapid transit in Belfast. The study concluded that a bus based rapid transit system is the viable option for Belfast rather than light rail technology. In addition the study identified a pilot network of three routes connecting East Belfast, West Belfast and Titanic Quarter through the city centre. The Department carried out further consultation in January 2010 on policy proposals for the bus based rapid transit system.

2	Key Issues
2.1	<p>DRD propose to implement Belfast rapid transit system on a pilot network of three routes linking to Belfast city centre. The preferred alignments for the three pilot schemes are identified as follows:</p> <ul style="list-style-type: none"> – CITI – Queens Quay to Queens Road within Titanic Quarter, returning via Station Street and Bridge End. – EWAY- East Bridge Street, Albertbridge Road and Upper Newtownards Road, terminating at a park and ride site near Quarry Corner. The Newtownards Road (lower) is included as the next best option. – Westway – Grosvenor Road, Falls Road, Andersontown Road, terminating at a Park and Ride site near Dairy Farm and/or McKinistry Road Roundabout. The lower Falls Road/Divis Street link is included as a next best option.

	<p>The three proposed Belfast Rapid Transit (BRT) routes will feed into a core city centre loop comprising May Street, Donegall Square South, Howard Street, Fisherwick Place, Wellington Place, Donegall Square North and Chichester Street, Victoria Street and Oxford Street.</p> <p>The proposed draft Council response is outlined in Appendix 1 along with a map of the route options. A summary of the main issues is outlined below:</p> <ul style="list-style-type: none"> - The Council generally welcomes the proposals to develop a pilot rapid transit system linking Titanic Quarter, east and west Belfast into the city centre as the first step towards the introduction of rapid transit in Belfast. However, the omission of pilot route proposals for north and south Belfast is of concern. The Council would request commitment from DRD to take forward the planning and design for the extension of the rapid transit network to ensure an equitable high quality public transport system is implemented throughout the city. - The Council would recommend a sustainable corridor approach to ensure bus rapid transit proposals fit into the existing public transport network. In particular further clarification on how the Metro corridors on the Upper Newtownards Road and the Falls Road could integrate with proposed system. - The Council would support the need for an integrated ticketing system between different public transport operators which is affordable. - The Council recommends close engagement with local businesses along the proposed routes to ensure that servicing and parking requirements are addressed. - The Council would request commitment from DRD that resources will be made available to implement a high quality, effective bus rapid transit system in Belfast.
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3	Equality and Good Relations Considerations
3.1	There are no Equality and Good Relations considerations attached to this report.

4	Recommendations
4.1	To consider the draft response to the public consultation on the route options for the Belfast Rapid Transit project and if appropriate agree a response.

5	Decision Tracking
Submit response – 6 January 2012	

6	Key to Abbreviations
DRD – Department for Regional Development BRT – Belfast Rapid Transit	

Draft Response

The Council welcomes the proposals to develop a pilot rapid transit system in Titanic Quarter, east and west Belfast linking to city centre as the first step towards the introduction of rapid transit in Belfast. However the omission of pilot route proposals for north and south Belfast is of concern. The Council would request commitment from DRD to take forward the planning and design for the extension of the rapid transit network to ensure an equitable high quality public transport system is implemented throughout the city.

The consultation report states that BRT will be '*a key driver for the regeneration of Belfast, providing high quality access and connectivity between the different parts of the city. It will link communities to key employment locations, shopping facilities, leisure, health and education services*'. The Council would emphasis that North Belfast contains some of the most socially deprived areas in the city and it is unlikely they will directly benefit from the pilot proposals. The Mater Hospital is a large trip generator which could benefit from improvements in public transport provision along with a number of regeneration opportunities such as the proposed new University of Ulster campus on York Street and the development of the Girdwood site. In the longer term opportunities could be developed to link Belfast Rapid Transit through North Belfast to the wider region and the International Airport as part of any roll out of the system.

The Council would also request consideration is given to a bus rapid transit network serving the south of the city where large volumes of commuters use the southern approach. In addition Queens University and the large student population living in the Ormeau Road area would benefit from improvements in public transport and connectivity.

There is a need to ensure rapid transit is a driver for regeneration throughout Belfast, providing high quality access to and linkages between jobs, hospitals, schools and colleges in different parts of the city and where possible supporting the regeneration of areas along the proposed alignments.

The Council supports the rapid transit proposal for Titanic Quarter as a crucial element to developing a sustainable transport system serving the city. The Council would request consideration is given to extending the CITI route to serve the George Best City Airport.

In relation to Westway, the Council supports the route serving the Royal Victoria Hospital which is a large trip generator in the city. The Council would emphasis the need to link with and maximise potential regeneration opportunities along the route alignment. Integration with land use planning along the route alignment is essential to allow higher density development and identification of regeneration opportunities.

The Council would recommend a sustainable corridor approach to ensure Bus Rapid Transit proposals fit into the existing public transport network. In particular further clarification on how the Metro corridors on the Upper Newtownards Road and the Falls Road could change to integrate with the proposed system. This should also ensure integration with Black taxis services to align with the proposed BRT routes. The Council would also request additional marketing of the existing rail network, highlighting the integration of the services to promote increased use of all public transport options.

To support integration and journey planning the Council would welcome an integrated ticketing system across different public transport operators which are affordable.

The Council recommends close engagement with local businesses along the proposed routes to ensure that servicing and parking requirements are addressed.

The Council would request commitment from DRD that resources will be made available to implement a high quality, effective bus rapid transit system in Belfast. Consideration should be given to the use of developer's contributions to fund the rapid transit infrastructure in recognition of the potential for new transport infrastructure to increase the value of development and land along the route.

The Council would request clarification on the future role of the Council in developing Local Transport Plans. The Council would like to support local people and communities by ensuring a community planning approach that integrates transportation and enhances connectivity for local neighbourhoods by making them safer, healthier and more inclusive.

Open Space

EWAY

The following Council maintained open spaces are located adjacent to the proposed EWAY preferred route: Dundonald Cemetery; Manderson Street Walkway and Short Strand Walkway & Ravenhill Rest Garden. Under draft BMAP these sites are designated as Areas of Existing Open Space and are protected under Planning Policy Statement 8 – Open Space, Sport & Recreation. Proposals for the transport corridor should take account of planning protections for these sites and ensure that the amenity is protected.

The Council would request consideration given to the potential to enhance public accessibility to Dundonald Cemetery with the inclusion of a stop. In general, the Council would encourage the retention and enhancement of pedestrian crossing points close to Council maintained open space.

The EWAY route proposal will also cross the proposed Connswater Community Greenway at Manderson Street/Newtownards Rd. As the greenway has been designed to increase public access along the Connswater River it is recommended that EWAY proposals for this intersection take into account the increased numbers of pedestrians and cyclists in the location.

WWAY

Council maintained open spaces adjacent to the WWAY preferred route are Dunville Park, Grosvenor Recreation Centre, City Cemetery and Falls Park. Under draft BMAP these sites are designated as Areas of Existing Open Space and protected under Planning Policy Statement 8 – Open Space, Sport & Recreation.

The rapid transit proposals should take account of the key public spaces and amenities along the alignment to protect the amenity value of the parks and further enhance access where possible.

Air Quality

The Council has reviewed both the Belfast Rapid Transit 'Integrated Impact Assessment' and 'Routes Options' public consultation documents and wish to submit the following comments in relation to air quality.

Integrated Impact Assessment:

With regard to the Integrated Impact Assessment document, it is noted that the assessment process has been informed by the principles of sustainable development, which require an optimum balance to be achieved between the social, economic and environmental aspects of a proposal. In addition, the Department for Regional Development has acknowledged that a fundamental component of good policy development involves ensuring that emerging policies comply with all statutory obligations.

Referring to the 2010 Sustainable Development Strategy for Northern Ireland, it is noted that strategic objective four of the Strategy includes a commitment to deliver statutory environmental standards with regard to air and other environmental pollution. Moreover, the supporting Sustainable Development Implementation Plan 2011- 2014 includes a metric of achieving the health-based objectives for seven key air pollutants by relevant dates as prescribed within the Air Quality Strategy for England, Scotland, Wales and Northern Ireland.

The Department will be aware that Part III of the Environment (Northern Ireland) Order 2002 places a statutory duty upon district councils to periodically review and assess air quality within their districts against the above-mentioned seven key air pollutants. Where the outcome of the assessment process indicates that an air quality strategy objective is unlikely to be achieved by the relevant compliance date, then the district council is required to declare an Air Quality Management Area which, at the least, covers the spatial extent of the exceedence. The Council must then work with other competent authorities, as prescribed latterly within the Air Quality Standards Regulations (Northern Ireland) 2010, including the Department for Regional Development, in order to develop and implement an Air Quality Action Plan in pursuit of the air quality standards.

Belfast City Council published its initial review and assessment of air quality across the city in 2004 which identified exceedences of particulate matter (PM₁₀) and nitrogen dioxide (NO₂) air quality objectives along a number of arterial road routes. As a result, the Council subsequently declared four Air Quality Management Areas (AQMAs) to include the M1 Motorway / A12 Westlink corridor, the Ormeau Road, the Upper Newtownards Road and from Cromac Street towards Short Strand and the Albertbridge Road. A source apportionment study confirmed the principal source of air pollution within the AQMAs to be road vehicles. It is anticipated that the proposed emerging preferred Rapid Transit routes will impact directly upon the Upper Newtownards Road and Cromac Street towards Short Strand and the Albertbridge Road Air Quality Management Areas and may also have an effect on air quality across the city as a whole due to the redistribution of arterial traffic.

In 2006, the Council published an Air Quality Action Plan for Belfast in collaboration with the Department for Regional Development and its Agencies, which made mention of the introduction of a bus-based Rapid Transit network. This Action Plan has delivered welcome improvements in air quality within the Ormeau Road Air Quality Management Area however, during 2010, levels of nitrogen dioxide continued to significantly exceed both national and European health-based air quality standards in the other three Air Quality Management Areas. As a result, the Department for

Environment, Food and Rural Affairs (DEFRA) and Northern Ireland Department of Environment (DoENI) have recently jointly consulted upon an application to the European Commission for a time extension to 1 January 2015 for achieving nitrogen dioxide air quality standards. In its consultation response to the Departments, the Council highlighted that government assumptions regarding future air quality improvements across the city are conservative in nature and on that basis, it is unlikely that limit values for nitrogen dioxide will be achieved in all locations by the proposed time extension deadline. In addition, Elected Members raised concerns regarding the health impacts of road transport based air pollution upon residents living in the vicinity of Air Quality Management Areas.

Failure to achieve air quality standards for nitrogen dioxide by the revised deadline could leave Northern Ireland open to infraction proceedings by the European Commission. In order to try to safeguard against this situation, and in accordance with the provisions of Article 13 of the Environment (Northern Ireland) Order 2002, the Council has given an undertaking to DoENI and to the Northern Ireland Assembly Environment Committee that it will convene meetings with representatives from Department of the Environment, Department for Regional Development and other relevant authorities in order to consider what additional air quality control measures may be required for the city. It is considered that the Rapid Transit system will form a key component of these additional measures.

Given the above-mentioned issues relating to air quality, the Cocunil is concerned that the Department has concluded that the environmental impacts of the Rapid Transit proposals are not considered significant enough to warrant a full assessment as part of the Integrated Impact Assessment process. The Cocunil recommends that air quality should be considered as a distinct issue within the Integrated Impact Assessment process in order that statutory, environmental and health-based impacts can be afforded due consideration.

Route Options.

With regard to the route options, it is acknowledged that the proposed bus-based rapid transit system has the capacity to deliver a wide range of social, economic and environmental benefits for the city. From an air quality point of view, specific benefits could occur as commuters' reliance upon the private car is reduced, thereby helping to cut levels of road congestion and emissions of ambient pollution. For these reasons, the proposals for a Belfast Rapid Transit system are welcomed.

The Council is concerned, however, that in the short term, the Rapid Transit may actually result in deterioration of local air quality due to a reduction in road capacity for general traffic. The Department acknowledges that increased delays for general traffic are anticipated as part of the 'trade off' for providing an enhanced public transport system. However, it is these delays that typically can give rise to increased road congestion, displacement of traffic onto adjacent routes and localised poor air quality. This may be of particular concern within the Upper Newtownards Road and Cromac Street towards Short Strand and the Albertbridge Road Air Quality Management Areas, which are likely to be impacted upon directly by the emerging preferred E-Way and Citi routes. Unfortunately, by excluding air quality from the environment section of the Integrated Impact Assessment, it is unclear whether the Department has considered this issue in detail.

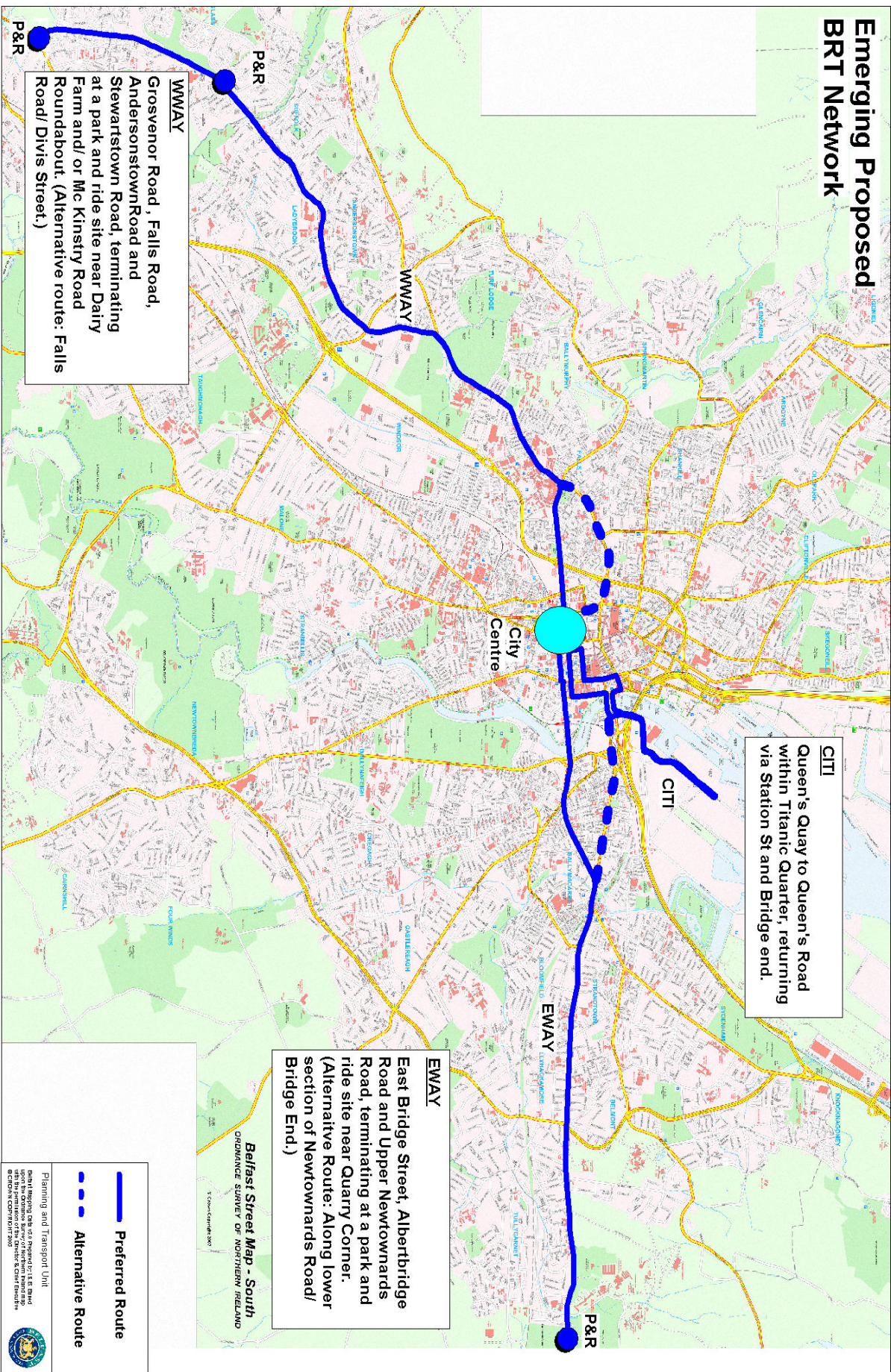
By way of mitigation, the Department has stated that a reduction in capacity of the Upper Newtownards Road, Albertbridge Road and East Bridge Street for private cars will be offset by the provision of park and ride facilities and the availability of other public transport services. It is noted, however, that the proposed Park and Ride

facility at Quarry Corner has capacity for up to 500 vehicles. Allowing for a reasonable rate of parking churn, it is considered that a Park and Ride of this capacity is unlikely to have a significant impact upon daily traffic flows along the Upper Newtownards and Albertbridge Roads.

In the case of the W-Way, the Department has suggested that the emerging preferred route option will commence with a 400 space Park and Ride facility at McKinsty Road and then make use of the Stewartstown, Andersonstown and Falls Roads before finally entering the city centre via the Grosvenor Road. As previously, the Department acknowledges that there will be a reduction in road capacity and parking provision along the route for private cars but, in addition, the W-Way will have to integrate with an existing Metro Quality Bus Corridor, regional Ulsterbus services and local taxis. Air quality monitoring has revealed ambient pollution levels to be reasonably low in West Belfast and consequently, the Council has not yet had to declare Air Quality Management Areas in this part of the city. The Department is advised that Article 9 of European Council Directive 2008/50/EC on ambient air quality and cleaner air for Europe, which has informed development of the UK Air Quality Strategy, requires member states to maintain or improve air quality where it is already good. For this reason, the Council is concerned that introduction of the Rapid Transit system could lead to a displacement of traffic onto adjacent routes and a deterioration in local air quality along the emerging preferred W-Way route and adjacent roads.

In order to understand these issues more completely, the Department is encouraged to undertake a quantitative assessment of the predicted environmental impact of the Rapid Transit along its emerging preferred routes as part of the Integrated Impact Assessment process. As part of this process, the Department may wish to evaluate the cumulative environmental impact of the Rapid Transit system and other supporting sustainable transport enabling measures such as 'Belfast on the Move'. The Council is prepared to assist the Department in this regard. By completing such an assessment, it is anticipated that air quality impacts of the Rapid Transit proposals can be better understood and, as a consequence, a system introduced that delivers a truly sustainable outcome for the city. Finally, the Department may wish to reflect upon the experiences of other cities that have successfully introduced Rapid Transit systems.

Emerging Proposed BRT Network





Report to:	Development Committee
Subject:	Feedback on ITLG visit – November 2011
Date:	13 December 2011
Reporting Officer:	John McGrillen, Director of Development ext 3470
Contact Officers:	Shirley McCay, Head of Economic Initiatives ext 3459

1	Relevant Background Information
1.1	Members will be aware that, at the 14 September 2011 meeting of the Development Committee, a proposal to host a delegation from the ITLG (Irish Technology Leadership Group) was approved. Financial support of up to £1000 towards the hosting costs was endorsed.
1.2	Six representatives from ITLG took part in a two day visit to Belfast on 4 and 5 November 2011. The 4 November programme was organised by Belfast City Council in conjunction with Invest NI and ITLG worked with University of Ulster on the 5 November event.

2	Key Issues
2.1	The Irish Technology Leadership Group (ITLG) is a group of Irish and Irish American senior executives based in Silicon Valley who are active in the global technology industry. They work to promote industry linkages between USA and Ireland through a range of collaborative initiatives including trade visits, award ceremonies and events in both USA and Northern Ireland/Ireland.
2.2	Six members of ITLG visited Belfast for a series of business meetings on 4 and 5 November. The representatives included: <ul style="list-style-type: none"> – Jon Bukosky, Advisor, Digital & Emerging Media, Untitled Entertainment – Robert Nashak, European VP, Digital Entertainment, BBC – Sean O'Donoghue, Chief Information Officer, Dreamworks – Eric Sargeson, International Wholesale, AT&T – John Hartnett, Chairman, ITLG – Cian Hughes, Head of Operations, ITLG

2.3	<p>As part of the 4 November programme the delegation met a range of organisations and individuals involved in the promotion and development of the technology industry in the city. The programme involved a breakfast briefing with Invest NI and NI Screen; a visit to Paint Hall studios; a presentation in Argyle Business Centre; a pitch from four local businesses in An Culturlann; a meeting with New York Stock Exchange; a meeting with the First and Deputy First Ministers and a dinner involving representatives from the Development Committee and other invitees at Belfast Castle.</p>
2.4	<p>The delegation offered some reflections on what they had seen and heard in the course of their visit. These included:</p> <ul style="list-style-type: none"> - Need to invest in marketing and “selling the story” –they felt that there was so much going on that was positive but that the message was not getting through. - Need to promote the positives – many of the presentations were pre-fixed by the historical context of the troubles – investors are interested in the “now” and the future – and how that can present a valuable proposition for their business. - Need to encourage companies to think global from the outset – the technology market is a global one – ambitious companies need to think on that basis. - Importance of creating a focus to allow companies like this to collaborate – building on a “Digital Hub” model and expanding the good practice at Northern Ireland Science Park. - Need to actively promote the acquisition of local companies by multi-nationals as a key element of an overall foreign direct investment (FDI) strategy – building on the example of New York Stock Exchange and their expanded presence in the city. - Support for internationalisation projects e.g. South by South West (SXSU) – as a means of raising the profile of the city and creating a positive image.
2.5	<p>They underlined once more their offer to maintain contact with the organisations and individuals that they had made in Belfast and suggested that some consideration be given to the development of strategic international relations with key locations e.g. San Jose. Members are asked to endorse further investigation of an international partnership with relevant locations as part of a review of International Relations.</p>
2.6	<p>They also confirmed that they would be keen to formalise this engagement through a Memorandum of Understanding – outlining the key areas of focus and identifying a number of tangible activities to be pursued. Members are asked to endorse further investigation of a Memorandum of Understanding (MOU).</p>
2.7	<p>As part of their visit, the ITLG Chairman announced a new internship programme for budding digital media developers, gaming coders and digital animators. The initiative will support successful candidates in securing an internship with a host company in Silicon Valley or Hollywood for a minimum of six months.</p>
2.8	<p>The potential start date for this programme is early 2012 and work is now underway to agree the criteria for the scheme. Details and proposals for funding will be brought back to the Committee for endorsement in January 2012.</p>

3	Equality and Good Relations Considerations
3.1	Any new internship programme will be subject to all relevant equality and good relations considerations.

4	Recommendations
4.1	Members are asked to: <ul style="list-style-type: none"> - Note the update from the ITLG visit programme - Note the proposal for an ongoing programme of work with ITLG, including an internship scheme – provisionally scheduled to start in early 2012 - Agree that a formal MOU with ITLG or with a specific location be further investigated.

5	Decision Tracking
A report on actions to be brought back to January 2012 Development Committee.	
Timeframe: January 2012	Reporting Officer: Shirley McCay

6	Key to Abbreviations
ITLG – Irish Technology Leadership Group	
MOU – Memorandum of Understanding	

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Belfast City Council

Report to:	Development Committee
Subject:	Committee for Culture, Arts and Leisure Inquiry Into the Creative Industries
Date:	13 December 2011
Reporting Officer:	John McGrillen, Director of Development ext 3470
Contact Officer:	Shirley McCay, Head of Economic Initiatives ext 3459

1	Relevant Background Information
1.1	The Northern Ireland Assembly Committee for Culture, Arts and Leisure recently announced an inquiry on the creative industries with a submission deadline of 20 December 2011.
1.2	The aim of the Inquiry is to investigate the policies, strategies and frameworks which oversee the development and growth of the creative industries in Northern Ireland, by examining whether these are fit for purpose and have effective support delivery mechanisms in order to maximise and harness the economic benefits of the creative industries.
1.3	Members will be aware that Belfast City Council has been playing a key role in the development and support of the creative industries over the past six years and as such would welcome the opportunity to participate in the inquiry and its response.

2	Key Issues
2.1	It is estimated that the creative industries in Northern Ireland employs around 31,000 people. Maximising the potential of these industries and how they could be better supported is the subject of the Committee for Culture, Arts and Leisure's first Inquiry.
2.2	The Committee is interested in collecting the views on what challenges the sector faces; what funding, training and other support is needed; and what opportunities exist to grow the creative industries?
2.3	This inquiry aims to:

	<ul style="list-style-type: none"> - Identify the potential of the creative industries in Northern Ireland, with particular emphasis on the economic benefits; - Identify the key challenges currently facing the sector; - Investigate whether particular gaps exist in current policies, strategies and delivery mechanisms, in areas such as: financial and business support; tax credits; education, training and skills development; leverage into international markets; the protection of intellectual property; and legislative developments; - Analyse and compare policies, strategies and delivery mechanisms in Northern Ireland with other UK regions and countries, in terms of their effectiveness in supporting the creative industries; - Examine the extent and effectiveness of the collaboration and co-ordination between industry, government departments and academia, in maximising and harnessing the full potential of the creative industries in Northern Ireland; - Consider the creative industries at sub-sector level in respect of any funding and support available; and assess the validity of prioritising particular industries within the sector for this support; and - Report to the Assembly with full findings, conclusions and recommendations for improvements in: policies and delivery mechanisms; and collaboration among all key stakeholders, to further develop and enhance the potential of the creative industries in Northern Ireland.
2.4	The Council is currently in the process of updating our creative industries strategy and action plan and as such have responded to the aforementioned inquiry based on existing research, knowledge and informal consultations with Belfast based creative companies.
2.5	Members will recall the recent visit to Belfast by the Irish Technology Leadership Group (ITLG). The delegation was impressed by the innovation of local businesses working in the creative technologies field and identified the potential for the further development of the sector, pointing to the Silicon Valley model as an example of the economic potential of an area focused on digital technology.

3	Equality and Good Relations Considerations
3.1	There are no specific Equality and Good Relations Considerations attached to this report.

4	Recommendations
4.1	Members are asked to: <ul style="list-style-type: none"> - Note the Committee for Culture, Arts and Leisure inquiry into the creative industries - Note the draft Belfast City Council response to the inquiry and agree that this be presented as the Council's draft response (subject to any amendments suggested), subject to ratification by Council.

5	Decision Tracking
No decision tracking attached to this report.	

6	Key to Abbreviations
ITLG - Irish Technology Leadership Group (ITLG)	

7	Documents Attached
Appendix 1 - Draft Belfast City Council response to Committee for Culture, Arts and Leisure inquiry into the creative industries	

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Appendix 1: Draft Belfast City Council response to Committee for Culture, Arts and Leisure inquiry into the creative industries

Belfast City Council welcomes the opportunity to respond to the above inquiry.

In response to the question raised in the inquiry terms of reference document, the responses from Belfast City Council are attached for consideration.

	<p>(1) Identify the potential of the creative industries in Northern Ireland, with particular emphasis on the economic benefits.</p>
	<p>On the 20 October 2011, the Department of Culture, Arts and Leisure issued updated statistics for the Creative Industries in Northern Ireland, summarised below:</p> <ul style="list-style-type: none"> - Gross Value Added (GVA) for the creative industries was £737million in 2008. This was equivalent to 4.2% of the region’s total GVA. - The estimated number of businesses in the creative industries sector was 2,200 in 2010. This represented 3.2% of all business units. - The number of people in creative employment in 2009 was estimated at 31,000. This represented 4.1% of total employment in the region. <p>Previous research undertaken on the creative industries in Belfast (2008) show the importance of the creative industries to Belfast’s economic development, these are summarised as follows:</p> <ul style="list-style-type: none"> - Over 1,200 creative industries businesses based in Belfast. - 55% of creative industries businesses in Northern Ireland are based in Belfast. - 35% of creative enterprises in Belfast work in the Design related field (267 in total) - 61% of creative enterprises in Belfast work in the Media related field. (486 in total) - Average of 16,000 people employed in the creative sector (full-time, part-time & freelancers) - 68% of the Belfast companies are micro–businesses with less than 10 employees. - 10% of Belfast businesses have more than 50 employees. - 97% of jobs are full-time. - Turnover levels for Belfast companies ranged from between £30,000 to £14,300,000. <p>By creative industries, we mean 'those industries which have their origin in individual creativity, skill, and talent, and which have a potential for wealth and job creation through the generation and exploitation of intellectual property'.</p>

Three key areas of intervention into the sector, under which the Council's programme of support is benchmarked are outlined as follows:

Business development and growth - '**Creative Economy.**' Covering issues such as increased start-up and growth initiatives for target companies.

Capability development – '**Creative Talent.**' Covering issues such as supply and demand, training services and facilities, increased liaison between university and industry, mentoring approaches, and attracting indigenous talent.

Infrastructure development – '**Creative Space.**' Covering issues such as incubation and all aspects of physical and cyber networking and clustering.

Since June 2004, Belfast City Council has made significant progress in developing and supporting this high growth industry in Belfast through a number of initiatives and actions.

Key results to date of that work include:

1. 35 Creative Industries Projects designed and developed.
2. 836 companies assisted.
3. 36 new positions created.
4. Estimated over £3,000,000 in sales generated by private sector.

Alongside, the above, numerous partnerships have been developed to help drive the creative agenda for Belfast forward and to ensure a collaborative and joined up approach to the development and support of this innovative sector.

Over the past 3 years, Belfast's creative industries have experienced unprecedented growth. From large scale Hollywood productions to innovative new company start-ups, from animation to comic book design, video games to documentaries, our creative sector is now considered key in relation to economic development, providing new jobs and spreading greater wealth around the city.

Our primary focus is on film and television, digital media, music and design. As well as providing a range of structured programmes of support, we play a key role in acting as a broker between the sector and other business support organisations at home and abroad.

The key benefit for Belfast from an expanding and developing creative industries sector is clearly an economic one. By playing a key role in the strategic support and development of Belfast based creative industries, local companies, providing jobs and spreading new wealth around the City, will establish a stronger economic base for all of the citizens of Belfast.

Belfast City Council is committed to the support and development of the creative industries and the impact they can have on Belfast both economically and socially. As a result, we are in the process of developing a new creative industries strategy and action plan, with the view of providing bespoke and fit for purpose support to the sector in Belfast, taking account of the interventions

	<p>of our partner organisations.</p> <p>We have identified four priority sub-sectors within the creative industries sector in which to focus our support. These sectors have been identified as those which will offer the maximum return on investment and are key to driving the local economy:</p> <p>Film and television Includes: feature film short films television production visual effects</p> <p>Digital media Includes: animation web development media technologies mobile content games design</p> <p>Music Includes: singers and songwriters bands music business distribution and promotion</p> <p>Design Includes: graphic design fashion design branding</p> <p>This research and action plan is scheduled to be complete by March 2012. We are keen to work with DCAL and other partners in both its development and implementation.</p>
	<p>(2) Identify the key challenges currently facing the sector.</p>
	<p>The most recent research carried out by Belfast City Council highlighted the challenges and barriers to growth for the sector such as access to funding, bespoke export initiatives, access to product development opportunities and specialist mentoring from business leaders in the creative sector. This is largely due to the nature of the sector and the fact that their needs and business structures are different to that of more traditional industries. While some support is available, such as through NI Screen and existing Invest NI programmes, the sector has issues in accessing this support given that it is still relatively new and given that it is still relatively new and under developed and companies tend to be micro businesses or sole traders.</p> <p>Key interventions and support required by the sector are as follows; Business Start; Sales and Marketing; Research & Development; Product / content</p>

	<p>development; Recruitment; Export development; Collaboration and networking; Business infrastructure; Funding.</p> <p>It is also important to note that ‘generic’ projects did not provide the support required and that focused and bespoke programmes relevant to the Film, TV, Digital Media, Music and Design sectors were essential.</p> <p>At present, the sector – like all business sectors – is finding it particularly difficult to access finance – given the often risky nature of the support and the fact that many companies are young and do not have a track record of business.</p> <p>While the Venture Capital support may be relevant, this too is reduced in the current financial climate.</p> <p>Skills is another key challenge for the sector particularly in some key sub-sectors such as gaming. There is a need for greater synergy between academia and industry on this challenge.</p>
	<p>(3) Investigate whether particular gaps exist in current policies, strategies and delivery mechanisms, in areas such as: financial and business support; tax credits; education, training and skills development; leverage into international markets; the protection of intellectual property; and legislative developments.</p>
	<p>Research undertaken by Belfast City Council in 2008 identifies areas where specific support is required and identifies some potential support mechanisms. These include:</p> <p>Marketing</p> <ul style="list-style-type: none"> – Need to provide support for accessing industry specific contacts in export markets; – Need to organise networking events with other businesses and areas outside Northern Ireland; – Need to bring new buyers to Northern Ireland to meet the industry and outline their purchasing criteria. – Need to provide support for product Marketing, since businesses lack specific in-house skills. <p>Recruitment</p> <ul style="list-style-type: none"> – Need to develop an apprenticeship model to give employers more confidence about making long term investments in new, inexperienced recruits; – Need to provide better incentives to retain the best talent within Northern Ireland e.g. competitions; awards. <p>Skills Development</p> <ul style="list-style-type: none"> – Skills development should include input from industry experts outside of Northern Ireland – this needs to happen on an ongoing basis, rather than ad-hoc interventions. <p>Funding</p>

	<ul style="list-style-type: none"> - Need to focus funding on R&D activity, as the ultimate growth and success of the sector will flow from its investment; - Need to improve private sector understanding of the creative industries to make investors less wary of the sector and promote more informed decision-making for both investors and business owners; - Need to help the industry to move away from its grant driven culture – to date there has been too much emphasis on finding a project to fit the fund, rather than a flexible funding arrangement where the fund can fit around the project. <p>Partnerships/Clusters</p> <ul style="list-style-type: none"> - Need to encourage collaboration as a way of reducing the individual business investment in R&D and creating a stronger proposition for both investors and clients; <p>Infrastructure</p> <ul style="list-style-type: none"> - Need to continue to invest in fibre optic network – rollout of Project Kelvin; - Need to create more shared resources for creative industries businesses e.g. shared working spaces; <p>Communication</p> <p>Need to develop specific channels to communicate to under-graduates and graduates – to excite them about the sector and stimulate increased interest from the best talent available;</p> <p>While there is some provision on these issues, support remains ad-hoc, patchy, inconsistent and subject to calls for application. The framework is reactive as opposed to having a forward-looking, developmental focus.</p> <p>With budgets to support the growth of the creative industries spread out across a number of government departments, we would advocate strongly for an integrated strategy to promote the sector, supported by ringfenced budgets at an enhanced level compared to the current provision.</p>
	<p>(4) Analyse and compare policies, strategies and delivery mechanisms in Northern Ireland with other UK regions and countries, in terms of their effectiveness in supporting the creative industries.</p>
	<p>Global Context</p> <p>The Lisbon European Council 2000 set out a ten-year plan of economic reform for the EU, which focused on developing a competitive, knowledge led economy. In 2005 the strategy was re-launched with increased focus on knowledge, innovation and human capital as the drivers for sustainable economic growth. In relation to knowledge and innovation, the Council called</p>

for development of innovation policies by member states.

The rationale for this focus on knowledge-led economic policy was to encourage the generation of increased demand for well-designed products and services. The 2005 plan encouraged member states to consider how to establish support mechanisms for innovative SMEs, promote better collaboration between the private sector and universities and promote better access to risk capital.

This document also refers to Finland as an example of a member state having developed innovation structures to encourage the development of collaboration within the creative industries, ultimately to contribute to stronger innovation performance at a national level.

Creative industries therefore must be recognised as an important driver for economic reform towards a knowledge-led economy; few other sectors embody all three of its characteristics – knowledge, innovation and human capital.

National Strategic Context

In *Staying Ahead: the Economic Performance of the UK's Creative Industries* - undertaken by The Work Foundation in 2007 – it is noted that the UK has the largest creative sector in the EU and probably in the world. This position is attributed at least partly to the positioning of London as a creative hub, as well as the undeniable advantage of English as the universal international language.

The creative and cultural industries in the UK employ circa 1 million people; a further 800,000 are employed in creative occupations. The report comments on the changes in the structure of consumer and commercial demand, contributing to the growth of the knowledge economy, which is closely linked with creativity.

The report goes on to identify 8 potential drivers of growth within the Creative Industries sector:

- i. Demand - Greater emphasis on distributing creative and cultural activity across the regions; the report also suggests that higher education levels also drives demand for more creatively discerning services.
- ii. Greater Diversity – This will result in greater inter-disciplinary innovation, but requires more systematic thinking about the internal processes that foster creativity.
- iii. A Level Playing Field – if distribution channels are too narrow or too few, the creative potential of SMEs is likely to be inhibited.
- iv. Educational Skills Ensuring Balance and the Appropriate Supply - there is a shortage of industry specific creative skills and of knowledge about how to commercialise creative ideas.
- v. Networks for Harnessing Capacity – the report points to unexploited market opportunities resulting from a lack of critical mass within individual creative industries businesses. This can only be overcome by joining forces with others to fill gaps in the knowledge and skills sets of creative industries SMEs.
- vi. Public Sector – Cox called for more encouragement of creativity in public procurement. The Work Foundation identifies the need for better developed

- public support and reform of some public support. It also calls for more strategically organized support to maximize the impact of grants.
- vii. Intellectual Property – The Staying Ahead report argues that a successful creative industries business model depends on capacity to copyright expressive value. At policy level decision-makers need to focus on implementation of existing copyright recommendations (e.g. Gowers report) and to continually review the copyright implications as new technologies emerge.
- viii. Building Greater Business Capacity – There are many creative industries businesses with potential to grow, but which cannot overcome blockages such as lack of management skills, lack of funding, limited resources.

Scotland is of interest because of the establishment of Creative Scotland. This is an umbrella initiative involving artists, cultural producers, the education sector, broadcasters, local authorities and Investment Agencies. In Wales a very technological sectoral definition of the creative industries is used, based on music, film & TV and digital content, but Wales has created a £7 million Creative IP Fund and the support to the creative industries in Wales has been brought together in a single 'Creative Industries Support Service', called 'The Hub'.

Ireland does not have a creative industries policy, as such, but gives extensive support to key sectors such as the crafts, film & TV, music and design related industries.

Best Practice Models for Creative Industries

Creative London

In London alone, creative industries generate some £21 billion each year and employ over half a million people. Not only is London the acknowledged leader in creative industries in the UK, and the major draw for creative industries talent, it is also recognized as (arguably) the global leader in stimulating economic performance from within the creative industries.

A good example of how support for the creative industries can be co-ordinated successfully is the Creative London strategy.

Creative London was launched in 2004 by then Mayor of London Ken Livingstone. Creative London was led by the London Development Agency and was established in recognition of the sector's importance to the city. The sector was and continues to be the third largest employment sector and growing in terms of employment numbers, sales and output in London.

Creative London was established to act as the strategic agency for creative industries. It was established to address some of the barriers identified for creative industries businesses:

- access to property on reasonable terms and negotiating those terms;
- access to markets, people and industry information;
- lack of showcasing and international promotional opportunities;
- lack of start-up and Intellectual Property advice; and
- lack of seed capital and mentoring to guide businesses and help them become investment ready.

	<p>The role of the agency was to:</p> <ul style="list-style-type: none"> - Support Creative Industries businesses; - Promote and showcase the sector nationally and internationally - Strategically plan for the sector and represent the sector to training and education bodies. <p>Its key services involved introducing creative talent to business mentors, investors, providing affordable studio space and free temporary venues to exhibit work and perform live.</p> <p>In June 2010 the Government announced that Regional Development Agencies (RDAs) were to be abolished, including the London Development Agency (LDA) by 31 March 2012.</p> <p>In response to the Mayor of London's proposals on devolution, the Government agreed that the functions of the LDA should be folded into the Greater London Authority (GLA) along with its assets and liabilities.</p> <p>The Economic Development strategy of the GLA has identified the creative industries as a key sector for the economy and states that 'over the span of this strategy, new global markets, and new opportunities and threats will emerge. A key aim of London's promotion efforts will be to ensure that business decision-makers around the world are fully aware of the breadth and depth of London's advantages as a business location.'</p> <p>Should Belfast begin to brand itself as a creative city – Creative Belfast – and raise the profile of creative industries here on a national and international basis? The Council has already committed significant resources and support to the sector. Should it follow in London Development Agency's footsteps and develop a separate brand for the sector, which would have its own website and separate resources for the sector e.g. a free recruitment / matching service similar to that provided by Creative Ireland?</p>
	<p>(5) Examine the extent and effectiveness of the collaboration and co-ordination between industry, government departments and academia, in maximising and harnessing the full potential of the creative industries in Northern Ireland</p>
	<p>The creative industries has been identified as one of the key sectors for growth over the coming years and as a key sector to help tackle the issues surrounding the current economic climate by many organisations in Northern Ireland. Belfast City Council see the creative industries key to the development of not only the City but to the wider region.</p> <p>In light of the current economic climate, it is now more crucial that future support is designed to address the common needs of the creative sector on a collaborative and cross cutting basis. The overall aim – to provide an integrated support programme from SME's and graduates, through the provision of a unique and highly innovative programme to ensure economic growth and sustainability within the creative industries.</p> <p>Belfast City Council has been successful in developing and running effective</p>

	<p>collaborative projects ranging from film and television projects with Northern Ireland Screen, Music projects with Invest Northern Ireland, DCAL, Arts Council and FFWDNI and digital media projects with Digital Circle, Queens University, University of Ulster, Belfast Metropolitan College and Skillset.</p> <p>The key element of the above collaborations is that of integrated development and delivery, not only in the management and implementation of the project, but between the participants on the various programmes, creating new networks, product ideas, companies and collaborative working infrastructures, which will lead to a highly innovative, creative and lucrative private sector,</p> <p>With the economy still very much in recovery, it has become vitally important that local regions work together to assist with the development of their key sectors in terms of economic growth.</p> <p>While the creative sector has been identified as key to economic growth by Government departments locally, nationally and internationally, for it to grow, measures need to be put in place to ensure that the right support is given at a time when they require it.</p>
	<p>(6) Consider the creative industries at sub-sector level in respect of any funding and support available; and assess the validity of prioritising particular industries within the sector for this support</p>
	<p>As stated earlier, Belfast City Council has been supporting the creative industries since 2004 and is identified as a priority action area for the Council.</p> <p>Three key areas of intervention into the sector, under which the Council's programme of support is benchmarked are outlined as follows:</p> <p>Business development and growth - 'Creative Economy.' Covering issues such as increased start-up and growth initiatives for target companies.</p> <p>Capability development – 'Creative Talent.' Covering issues such as supply and demand, training services and facilities, increased liaison between university and industry, mentoring approaches, retraining and attracting indigenous talent.</p> <p>Infrastructure development – 'Creative Space.' Covering issues such as incubation and all aspects of physical and cyber networking and clustering.</p> <p>Since June 2004, Belfast City Council has made significant progress in developing and supporting this high growth industry in Belfast through a number of initiatives and actions reinforcing Belfast City Council's role in the Creative Industries.</p> <p>Initially, Council support focussed on all areas of the creative industries, ranging from art and crafts to film and e-learning products. At the end of the first three year period of interventions, an evaluation was carried out in relation to the impact of these interventions and in turn highlighting the sectors which benefited most and offered the best return on our investment.</p> <p>Coupled with the emphasis and changes in digital platforms and technologies and the investments made by HBO, Playtone and MTV, it has become clear that for the sector to fully develop and be in a position to compete with the likes</p>

of London, San Francisco, LA, New Zealand and Scotland, bespoke support should be targeted at the following key sectors:

- Digital media

Includes:

- animation
- web development
- media technologies
- mobile content
- games design

- Music

Includes:

- singers and songwriters
- bands
- music business
- distribution and promotion

- Design

Includes:

- graphic design
- fashion design
- branding

These sectors are considered to present greatest opportunity for return on investment and are also those which demonstrate the greatest potential for growth.



Belfast City Council

Report to:	Development Committee
Subject:	Support for Independent Traders – Update Report
Date:	13 December 2011
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officer:	Shirley McCay, Head of Economic Initiatives, ext 3459

1	Relevant Background Information
1.1	Members will be aware that, at the 23 August meeting of the Development Committee, a retail action plan was endorsed. This included six programmes to support the independent retail sector in the city.
1.2	The individual programme elements have been progressing since that time. An update report on progress is attached

2	Key Issues
2.1	The retail sector, and in particular the independent retailers, are under considerable pressure in the current economic climate. Retailers have been trying to develop a range of initiatives to increase footfall and spend in their areas and have, increasingly, been working collaboratively under the guise of traders' forums to carry out this work.
2.2	At the 23 August 2011 Development Committee, a budget of up to £200,000 was committed to promote the development of the sector through a range of activities including trader group development, local area campaigns, the bespoke Retail Therapy business development programme, market start up programme and Independent Retail week (proposed to take place in March 2012).
2.3	<u>Retail Therapy Programme</u> This tailored support programme helps independent traders to assess their business and provides one-to-one mentoring, mystery shops, business planning and financial assistance to move their business forward. A total of 27 retailers are currently on the programme.

<p>2.4</p>	<p>Previous participants on the Retail Therapy Programme have had noted successes in recent times: 2010-2011 Programme:</p> <ul style="list-style-type: none"> - For every £1 spent by BCC generated £10 for business - Shankey's Male Grooming have opened a new concession in the House of Fraser, Victoria Square creating two new jobs. - Ground Coffee Shop are in the process of opening another coffee shop in Belfast creating 16 jobs - Arcadia Deli - Regional Winner UK's Best Deli - Honey nominated for a UK Stars: Underlines' Award.
<p>2.5</p>	<p><u>Retail Masterclasses</u> The Retail Masterclasses series runs from October 2011-March 2012. These free masterclasses provide retailers with the opportunity to improve business skills, attract new customers and make their business more profitable.</p> <p>Dates of Retail Masterclass series:</p> <ul style="list-style-type: none"> - 11 October 2011 – Dynamic management for retailers in difficult times - 22 November 2011 – Managing suppliers and sourcing locally - 10 January 2012 – The customer is always right vs the customer is always first - 31 January 2012 – Branding for retailers – a journey, not a destination - 21 February 2012 – Why retailers should be trading online and using social networking - 27 March 2012 – Loyalty schemes – their place in today's environment. <p>These events attract, on average, 25 traders. Feedback has been very positive to date.</p>
<p>2.6</p>	<p><u>Area campaigns</u> Under the previous retail support plan, provision had been made for local campaigns to enhance the profile of designated shopping areas through a range of targeted support initiatives. This enabled groups to undertake activities such as producing local trader maps and business directories, creating a website for promotion and online trading and organising local events to increase footfall and trading in specific areas.</p>
<p>2.7</p>	<p>At the 23 August 2011 committee it was agreed that an amount of up to £20,000 be available to constituted traders groups for expenditure against a range of agreed promotional activities, similar to those identified above, within the current financial year.</p>
<p>2.8</p>	<p>It is accepted that a number of the traders groups are more advanced than others and that some may be able to bring resources to supplement the Council contribution. In recognition of this, it was also agreed that, beyond the £20,000 support provided, Belfast City Council can match the trader contribution £ for £, up to a total maximum contribution from Council of £40,000. Consideration should be given to the sustainability of the proposed intervention, given that funding levels cannot be guaranteed in future years.</p>
<p>2.9</p>	<p>To date the following groups have received support to implement their area campaigns:</p>

	<ul style="list-style-type: none"> - Lisburn Road Business Association - £40,000 for retail focused events to promote the Lisburn Road, development of a customer management system, website development, PR and marketing for the area and engagement with all retailers on the Lisburn Road. One 'I love Saturdays' event has been held to date with the customer management systems currently being installed. LRBA have liaised with all businesses on the Lisburn Road and will feature these on the new website to be developed in January 2012. - Ballyhackamore Business Association - £9277.50 for marketing and promotion, retail focused events, development of a brand and customer e-zine. Ballyhackamore Business Association held their first Christmas event on 1 December with approximately 700 attendees. Initial feedback has noted a significant increase in sales on the day of the event and in the follow up period. - Strandtown Traders Association - £11,428.00 for marketing and promotion of the Belmont Road and two retail focused events. The first event a Victorian Christmas Fair will take place on Saturday 10 December 2011. <p>2.10 Work continues with other existing traders/business organisations to develop action plans to promote independent retail in their area. These include Sandy Row, Shankill and West Belfast.</p> <p>2.11 <u>Trader group development support</u> Some initial discussions have taken place with a range of new and fledgling traders groups, all of which are at varying stages of development. It is proposed that work should continue in helping these and other groups link into existing support; identify their priorities for action to address the challenges and help deliver on these. It will be important for the groups to consider becoming constituted if they are to draw down resources or to consider a management structure which might allow them to access and manage funding.</p> <p>2.12 It was agreed that some seed funding of up to £3,000 per group should be made available to work on issues such as collaborative promotion and marketing campaigns, events to increase footfall and customer loyalty initiatives. Initial discussions with traders have highlighted a wider range of issues including business rates; street cleansing; car parking and environmental improvements. We are working with colleagues from relevant departments and agencies as well as local Elected Members to see if these can be addressed. However for some of these groups, it may be some time before they can begin to work on the types of initiatives for which our support is intended.</p> <p>2.13 Potential Groups with whom some initial discussions have taken place:</p> <ul style="list-style-type: none"> - Oldpark/Cliftonville Circus – Officers have liaised with retailers in the area regarding the formation of a constituted traders group. Discussions with the retailers have shown a consensus in establishing such a group and have also highlighted other issues e.g. cleansing, litter bins etc. These issues have been passed on to the relevant Council department via the neighbourhood working groups. The traders have agreed to meet in January to discuss the formation of a constituted group and identify an action plan.
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	<ul style="list-style-type: none"> - Antrim Road – Officers have liaised with retailers on the Antrim Road regarding the re-formation of a traders group. There is a good level of interest and an initial meeting will be held in January. <p>While a number of groups have made contact directly with officers, members are asked to consider additional groups and areas that may benefit from this type of support.</p>
2.14	<p><u>Market start up programme</u></p> <p>This pilot programme will support six new-start entrepreneurs to explore market trading as a possible business model, in advance of progression to a retail outlet. They will receive a package of support to include workshops, one-to-one mentoring, best practice visits, assistance with product development, business plan support and undertake a test-trading period at St. George's Market. This programme will be launched in December 2012, in conjunction with a number of initiatives supported by the National Market Traders' Federation (NMTF).</p>
2.15	<p><u>Independent Retail Week</u></p> <p>Independent Retail Week will take place from 5-11 March 2012 and will include a range of events, workshops and activities to promote the range and quality of our independent traders and the services they offer. Traders have signed up to be included in the marketing materials, offer promotions and traders groups have agreed to organise local events to increase footfall within their area.</p>

3	Resource Implications
3.1	<p><u>Financial</u></p> <p>The independent retail support budget was approved by the Development Committee in June 2011.</p>

4	Equality and Good Relations Considerations
4.1	There are no specific equality or good relations considerations attached to this report.

5	Recommendations
5.1	Members are asked to note the contents of the report.

6	Decision Tracking
A report on progress will be brought back to Development Committee in April 2012.	
Timeframe:	April 2012
Reporting Officer:	Shirley McCay



Report to:	Development Committee
Subject:	Visit by Lord Mayor of City of London
Date:	13 December 2011
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officers:	Shirley McCay, Head of Economic Initiatives, ext 3549

1	Relevant Background Information
1.1	The Lord Mayor of the city of London – Alderman David Wootton – will visit Belfast on 27 January as part of a visit programme to a number of cities across the UK.
1.2	The objectives of this one day visit are: <ul style="list-style-type: none"> – To be briefed about the unique contribution of the area of the UK financial services offering – To hear regional views on the financial services environment – regulation, taxation etc. – To engage with civic leaders in each of the locations.
1.3	The visit is being managed locally by Invest NI and they have approached Belfast City Council for guidance and input on the civic elements of the programme in particular.

2	Key Issues
2.1	The Lord Mayor of the City of London's principal role is to be an ambassador for all UK-based financial and professional services. The current Lord Mayor is a former partner in the law firm Allen and Overy LLP which has recently invested in Belfast and which is currently recruiting staff to meet its targets, as agreed by Invest NI.
2.2	The Lord Mayor will arrive in Belfast at around 10.30 on the morning of 27 January, on a flight from the Isle of Man – which is the previous stop on his visit. He will also have visited Manchester, Bradford and Liverpool prior to coming

	here. Belfast is the last city on his visit programme.
2.3	<p>At this stage, a very draft programme for the visit has been organised, for endorsement by the office of the Lord Mayor of the city of London. This includes:</p> <ul style="list-style-type: none"> - Meeting with the Lord Mayor of Belfast or nominee (Lord Mayor is unlikely to be available – awaiting confirmation of availability of Deputy Lord Mayor) - Industry briefing on financial and business services sector in Northern Ireland - Meetings with representatives from academia and industry to discuss skills issues - Company visits - Reception (potentially in City Hall) with wider business representatives.
2.4	There will be an opportunity for representatives from the Development Committee to formally meet the Lord Mayor as part of the programme. This could present a useful platform for discussing a future visit to London to meet key representatives of the financial services industry and to promote the Council's investment package.
2.5	Given the historical linkages between the city of London and the city of Derry/Londonderry, the Lord Mayor of the city of London's office have asked whether the Mayor of Derry/Londonderry can be invited to Belfast for a meeting, as part of the visit programme. This is being discussed with our Lord Mayor's office.

3	Resource Implications
3.1	<p><u>Financial</u> No financial implications – Invest NI will cover all programme costs.</p>

4	Equality and Good Relations Considerations
4.1	There are no specific equality and good relations considerations attached to this report.

5	Recommendations
	<p>Members are asked to:</p> <ul style="list-style-type: none"> - Note the planned visit to Belfast by the Lord Mayor of the City of London - Note the opportunity for Members of the Development Committee to meet the Lord Mayor as part of this programme (official invitations to be issued by Invest NI).

6	Decision Tracking
	There is no specific decision tracking attached to this report.



Report to:	Development Committee
Subject:	The Black Box
Date:	13 December 2011
Reporting Officer:	Shirley McCay, Head of Economic Initiatives, ext 3459
Contact Officers:	Kerrie Sweeney, Tourism, Culture and Arts Manager, ext 3586

1	Relevant Background Information
1.1	Members will be aware that at a meeting of the Development Committee on the 10 February 2010, Committee agreed to offer a two year funding package comprising £25,000 in 2010/11 and 2011/12.
1.2	At the same meeting, Committee further agreed to provide no further funding after the 2011/12 period to the Black Box even if the Metropolitan Arts Centre (MAC) was not operational in 2012.
1.3	Members should note that the Black Box was treated as a special case and did not apply through the Annual or Multi Annual Culture and Arts funding programmes.
1.4	Committee recognised there was a major gap in the physical infrastructure pending the completion of the major capital development of the MAC which is due to open in early 2012.
1.5	<p>To date, the Black Box's public funders are Belfast City Council, Arts Council NI and Department for Social Development. The Black Box as an arts and culture performance space has achieved its objectives set out by its funders.</p> <ul style="list-style-type: none"> – It has contributed to/built the existing arts infrastructure in the Cathedral Quarter – expanded the range of opportunities for people to enjoy and participate in the arts – played a role in tourism – improved social cohesion.
1.6	It has provided the focus for Belfast City Council's Sunday's Programme, Late Night Art, Music Tourism and Culture Night. It also plays a vital role for Creative Industries with most local unsigned musicians choosing it as the venue to launch and profile new albums.

1.7	Since it's opening in 2006 the Black Box has won the Fate Award for Best Newcomer in 2007 and has attracted 193,000 people to the variety of events and activities it offers throughout the year. Audience numbers have increased between 2007 and 2010 rising from 31,150 to 43,000 which is a 38% growth in a period of recession.
1.8	1,800 events have been held in the Black box since April 2006 to July 2011 which 55% fall within the music event category.
1.9	Music growth alone has increased from 47% to 63% in 2011. Demand to watch and listen to local artists in an intimate setting has defined the Black Box's speciality/USP. Consultations with businesses have stated that the Black Box has played a key role in economic development and its closure would be missed.

2	Key Issues
2.1	Oxford Economics were commissioned by the Black Box Trust in September 2011 to undertake a feasibility study into the future operation of the venue as a cultural and artistic events space in co-existence with the opening of the MAC. A copy of this report is attached as Appendix 1 for Members consideration.
2.2	<p>In conclusion, Oxford Economics demonstrates that</p> <ul style="list-style-type: none"> – even with the opening of the MAC, there is a need and demand for the future operation of the Black Box; – the venue brings a niche product to the arts and culture sector and offers performances and events that will not be in direct competition with the MAC; – the Black Box has operated on a minimum amount of public sector funding and has become 82% self generating since opening in 2006. However its ongoing net deficit needs to be addressed for it to continue to exist and move towards greater sustainability.
2.3	The consultants considered a range of options from do nothing, closing or becoming more commercial. In conclusion, they recommended that the Black Box should continue however should broaden their funding base and recommended a range of potential funding schemes such as the Paul Hamlyn Foundation and Heritage Lottery Fund.
2.4	The consultants recognised that there is a need to secure funding for 2012/2013. Belfast City Council, Arts Council of Northern Ireland and DSD remain listed as potential funders. BCC Officers explained during the consultation process that the Black Box would be eligible to apply for culture and arts funding as part of any competitive funding programme in the future.
2.5	The overall financial support which the Black Box is seeking from its existing funders is £61,000. An application has been made to the Arts Council NI to their Annual Funding Programme for £26,000 and a decision will be made February 2012. DSD are considering their position as co-funders of both the MAC and Black Box, to continue funding would require a cohesive decision from all potential funders and ministerial approval. No formal funding application has been made to DSD.

2.6	ACNI and DSD are supportive that the Black Box can co-exist with the MAC following the need for an approved business plan focusing on sustainability and capacity building. All potential funders would need to contribute.
2.7	Members will be aware however the culture and arts annual and multi annual funding was extended for 2012 / 13 without an open call due to the ongoing work on the Integrated Cultural Strategy and review of funding programmes. Members will also be aware that officers have been asked to look at establishing a flagship fund for 2012/2013; however this has yet to be agreed. Therefore in summary there is no funding programme currently available for the Black Box to apply to.
2.8	Black Box are investigating the option of building purchase and may approach Council through the City Investment Fund at a future date.
2.9	Having reviewed the report and considered the current operating context of the Black Box, Members should note that the Black Box is a viable venue and can co-exist with the MAC. The options for providing financial support in 2012/13 are as follows: <ol style="list-style-type: none"> 1. Decline funding the Black Box post 31 March 2012 as per the committee decision on 10 February 2010, however invite them to apply for future culture and arts funding through the competitive process. Should the competitive flagship fund be agreed and opened for 2012/2013, the Black Box would be eligible to apply. However, due to time lag waiting for the fund scheme to open, there is a risk that Black Box will close by the end of March with a decision needing to be made by the Black Box Board in February 2012. 2. Extend the Black Box's funding for a further year, at the same rate of £25,000, on the basis that this is the same approach taken for all culture and arts organizations funded via the annual fund and multi annual fund. 3. Similar to option 2 above, however invite the Black Box to make a formal request for support based on the actual shortfall required within the context of the Oxford Economics Study and their advice to secure other additional sources of funding. Maximum available would be £25,000.

3	Resource Implications
3.1	One year funding with a maximum limit of £25,000 to come from within the Tourism, Culture and Arts budget 2012/2013.

4	Equality and Good Relations Considerations
4.1	There are no specific equality or good relations considerations attached to this report.

5	Recommendations
5.1	Members are requested to consider the one options outlined in 2.9 (above).

6	Decision Tracking
Further to ratification that the funding payment be allocated to the Black Box Timeframe: April 2012 Reporting Officer: Kerrie Sweeney	

7	Documents Attached
Appendix 1 - Oxford Economics Feasibility report.	

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OXFORD ECONOMICS

A Feasibility Study for the Black Box

November 2011

A report prepared for The Black Box Trust



**OXFORD
ECONOMICS**

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Executive Summary

Background

The Black Box Trust was formed in 2004 as a voluntary organisation with the aim of creating a dynamic and flexible performance space in Belfast City's Cathedral Quarter to build audiences in the area until the arrival of the proposed Metropolitan Arts Centre (MAC).

The Black Box opened in April 2006, operating from rented premises on Hill Street, at the heart of the Cathedral Quarter. Since then, the venue has provided space for a diverse range of artistic programming, including live music, theatre, literature, comedy, film, visual art, live art, circus and cabaret, attracting over 30,000 people each year.

Oxford Economics were commissioned by the Black Box Trust in September 2011 to undertake a feasibility study into the future operation of the venue as a cultural and artistic events space in co-existence with the opening of the MAC.

Strategic context

The future operation of the Black Box is set within the context of the current public sector funding environment, published strategies of key stakeholders and other relevant arts, culture and regeneration policies.

The operation of the Black Box as an arts and culture performance space has contributed to many of the key objectives of the strategies its funders - ACNI, BCC and DSD. It has improved recognition of the benefits arising from artistic events and performance spaces; it has contributed to the existing arts infrastructure in the Cathedral Quarter; expanded the range of opportunities for people to enjoy and participate in the arts; played a role in tourism in the City; and improved social cohesion during regeneration of the Northside of the City.

Assessment of need and demand

For the purposes of the feasibility report, the assessment of need and demand has been considered under the following headings:

- Audience performance
- Audience diversity
- Links with local business
- Engagement with Festivals and Promoters
- The Metropolitan Arts Centre (The MAC)

Winning the Fate Award for 'Best Newcomer' in 2007, the Black Box has attracted almost 193,000 people to the variety of events and activities it offers throughout each year since it opened its doors.

The venue's audience numbers have increased steadily between 2007 and 2010, rising from 31,150 to 43,000. This 38 percent growth in audiences over this period was not only remarkable for the Black Box as a new performance venue but also for the period of recession in which it operated.

There have been almost 1,800 events held in the Black Box between April 2006 and July 2011, 55 percent of which fall within the music event category. The proportion of music events to total events has grown from 47% in 2006 to 63% in 2011.

Growing demand to watch and listen to local artists in an intimate setting has defined small music events as the Black Box's speciality. Approximately 59 percent of the Black Box's total audience over the last five years have attended the venue specifically for this type of experience.

The mosaic analysis undertaken by Audiences NI provided a typology of the Black Box audience. They are a mix of young, affluent, mature and artistic type people, falling within the 'Cultural Avant Garde', 'Business Leadership', 'Terraced Melting Pot' and 'Local and Commercial' categories making up four of the top five types of household booker attending the venue. Although it should be noted that the results are based on the names and addresses of all the accounts within the Black Box's Worldpay booking system and did not include any mailing list data, door sales or through other ticket sellers.

Evidence gathered during consultations with local businesses indicates that the Black Box has played a key role as an arts and culture performance space and as a member of the local business community in the Cathedral Quarter. It has attracted people to the area, creating a spillover effect in terms of increased trade for local proprietors, and the fact that its presence would be missed if the venue was to close, suggests that there is a need for its future operation locally, in complementing existing infrastructure and resources.

All feedback gathered from the Festivals and Promoters, shows that the Black Box has provided a key performance space for arts and cultural events that is flexible, accessible, versatile, affordable and optimally sized, with the only downside not being fully licensed. Whilst the majority recognise the benefits of the MAC as a major addition to the arts and cultural offering in the area when it opens next year, they see the need for the Black Box to continue to operate as it complements what the MAC will be offering.

From evidence gathered from consultation, it is clear that the MAC will inevitably be in competition with many providers, both arts venues and commercial venues, given the broad range of programmes and activities that they will be offering. However, the Black Box tends to host one-off music and other events that are less mainstream, supporting indigenous artists, whereas the MAC, aspiring to be a 'world-class state-of-the-art venue' may showcase longer runs of artists that are better known to audiences. It is our view that the each will provide a different offer of performances and events in two very different venues, giving audiences a greater choice.

Financial analysis

The Black Box has done well to grow its turnover and income over the four years of its existence, although the current economic recession has seen this growth stall. This has been achieved with a reduced level of grant assistance from the public sector and the company had achieved a position of over 80% self generated income by 2009/10. In that year, trading

activities contributed to £293,000 out of total turnover of £358,000 with the balance of £65,000 coming from grant assistance from ACNI, Belfast City Council and DSD.

However, the company has not made profits in the first four years of its existence and an exceptional loss in 2008/09 has left the company with a large bank overdraft but it continues to operate as a going concern with the support of its major creditors. Whatever the way forward for the organisation, the bank overdraft created by this loss needs to be addressed as it constrains the future development of the company.

The company faces a number of financial challenges looking forward including the continuing economic recession which is impacting on the business. In these circumstances it will be important for the company to strengthen its financial management and reporting systems as it seeks to maximise revenues and control its costs.

Options for the way forward

In considering the way forward for the Black Box, we identified the opportunities and constraints facing the venue.

The specific opportunities include:

- The continuing growth of Cathedral Quarter as a cultural quarter of the city and the potential implementation of the Cathedral Quarter 5 Year Vision & Development Plan provide an important context for the Black Box;
- Having established itself over the last 5 years as a key element of the Cathedral Quarter scene with strong support and growing audiences, there is an opportunity to consider how to consolidate and enhance its position over the next 5 years;
- The events in Northern Ireland associated with 2012 and the associated projected growth in tourism visitors to Belfast next year and beyond represent an important opportunity for the Black Box;
- In our view, the opening of the MAC represents an opportunity rather than a threat, not just for the Black Box but for the whole Cathedral Quarter with increased numbers of visitors and footfall in the area; and
- The growing reputation of Belfast as a music city suggests that there will be increased demand for music venues across the city.

The constraints facing the Black Box's future operation include issues of public funding, temporary set-up, lease and usage of the building, venue and location.

- Public spending cuts have significantly curtailed organisational and departmental budgets. Therefore it is unlikely the building of the Black Box would be purchased by any public sector organisation and the level of funds previously provided maintained;
- With the Black Box not making any profits during the first four years of its existence and creating a substantial bank overdraft, it is unlikely that the Black Box would succeed in securing private sector investment or any debt finance from the bank until its overdraft is cleared or seen to being reduced;

- While the Black Box was set up as a temporary venue, it has created its own unique presence and has become accepted as a key element of the Cathedral Quarter, there is still a perception that it is threatened by the opening of the MAC.
- The current terms of leasing the Black Box building could not be renegotiated to lower the level of rent. Furthermore, the only permitted use of the building is a mixed performance venue for live music, comedy and other events.
- There are no suitable venues that capture the essence of the 'black box' feature and no alternative locations within the Cathedral Quarter or other parts of Belfast.

We considered a long list of options when considering the future operation of the Black Box. These options were then subjected to a short-listing process of which the majority fell under broader descriptions. These options were identified in context of the key objectives of the venue's continued existence.

Option 1: Status Quo

Option 2: Closure of the Black Box

Option 3: Becoming an independent/commercial venue

Option 4: Broadening the venue's funding base

Considering the advantages and disadvantages of each option, we identified Option 4 as the preferred option for the future operation of the Black Box. The advantages and disadvantages associated with Option 4 are presented in Table 1 below.

Table 1: Advantages and disadvantages of Option 4

Advantages	Disadvantages
Attract new monies and investment from relevant organisations such as the Paul Hamlyn Foundation, Heritage Lottery Fund, NITB	Additional time and resource required to prepare applications on top of existing applications to traditional providers
Increase the probability of attaining funding	May not meet some of previous funders' new criteria and the criteria of potential funders
Become less dependent on traditional sources of funding	Competition for funding is high and available monies are limited
Help to increase the job security of existing venue staff and equipment suppliers	Potential delay in delivery of funding
Increase opportunities for staff development, as specific grants for training can be obtained	

Advantages cont...	Disadvantages cont...
Increase opportunities to move towards becoming more sustainable, generating additional income	
Additional resource to programme more performances and events	

In our view, applying to additional sources of public sector funding and other relevant sources is the preferred option for the continued existence of the Black Box. It will also help to mitigate against the risk of not receiving funding.

The preferred option to 'continue with public sector and other support' will have a number of associated risks and uncertainties that potentially will affect successful implementation. These were considered in terms of the following:

- Lack of public funding
- Restricted lending
- Criteria of other funding sources
- Competition for funding
- Lack of business case

Conclusions and actions

The overall evidence gathered and analysis provided has shown that the Black Box has established its own unique identity and audience and that there is a need and demand for the future operation of the venue, in terms of the meeting the strategic objectives set out by key stakeholders, attracting a growing audience, adding to the arts and culture offering, contribution to local business and creating its own identity and audience type.

It is our view that the Black Box brings a niche product to the arts and culture sector and offers performances and events that will not be in direct competition with the offering provided by existing or planned infrastructure, such as the MAC as a result of its unique nature.

The Black Box has operated on a minimum amount of public sector funding and has become 82% self-generating since opening in 2006. However, its ongoing net deficit needs to be addressed for it to continue to exist and move towards greater sustainability.

A number of steps will need to put in place to address these issues going forward and to make the preferred option to continue with public sector funding and attract other support viable.

The first step the Black Box will need to take is to prepare a robust business plan for its future operation. A summary action plan is included in Table 2 below:

Table 2: Action plan and timeframe for implementation

Actions	Timeframe for implementation
Business plan setting out the venue's vision over the next 3 to 5 years, providing strategic plans in relation to its marketing and sales, staff, customers and operations going forward. It must also include a financial analysis, setting out goals to meet for the venue to move towards sustainability, in line with its aspiration to be 100% self-generating, and the level of support it will need to meet these targets.	Within the next 6 months
Introduce an in-house system to record the number of events by type, the audience they attract and the revenue they generate through ticket sales, rental of space and bar sales. This will enable the Black Box to monitor their performance and know which events benefit the business most. It will also build a baseline for projecting future audiences.	Within the next 3 months on an ongoing basis
Carry out market research of those attending events and performances at the venue to develop a deeper understanding of the customer base. This will identify any gaps in the characteristics of those who typically attend specific events and enable the Black Box to broaden their marketing strategy.	Within the next 3 months on an ongoing basis
Complete a skills audit of board members to ensure all the expertise required to run the Black Box effectively are in place and identify any gaps. The Board has already identified a need to strengthen its financial management and strategic planning.	Within the next 2-3 months and annually thereafter
Consider making greater use of volunteers to work in the Black Box to reduce the wage bill of the venue.	Within the next 6 months
Engage with the MAC and other arts providers in the Cathedral Quarter, including Oh Yeah! and the University on programming and pricing issues, if necessary facilitated by the Arts Council.	January 2012 onwards (aligned to the MAC's programming and pricing becoming publicly available)

We understand that the Black Box plans to apply for funding from the ACNI, BCC and DSD for financial year 2012/13. This funding is intended for continuing the operation of the venue. To mitigate against the risk of not receiving the required level of funding from these organisations, the Black Box have already investigated some of the other funds that may be available for them to apply for, one being the Paul Hamlyn Foundation. We have identified other potential streams, such as the Heritage Lottery Fund, and others, of which details are included in Annex A.

1 Introduction

1.1 Background

The Black Box Trust was formed in 2004 as a voluntary organisation with the aim of creating a dynamic and flexible performance space in Belfast City's Cathedral Quarter to build audiences in the area until the arrival of the proposed Metropolitan Arts Centre (MAC). The organisation was incorporated as a Company limited by guarantee.

The new Company was established at virtually no cost to the ratepayer, using a range of grant aid sources from the Arts Council for Northern Ireland (ACNI), Belfast City Council (BCC) and the Department for Social Development (DSD), with the initial set up costs funded by the Laganside Corporation, the Department for Culture, Arts and Leisure (DCAL), BCC and the Millennium Commission amounting to £275,000. The Millennium Commission provided the most significant proportion of the initial set up costs at £195,000. This fund was made available to cities, such as Belfast, that lost out on the bid to become the European City of Culture.

The objectives of the Black Box were clearly set out in the Business Plan prepared in 2005:

- To meet an urgent need in the local arts infrastructure, specifically in the Cathedral Quarter, with the opening of a temporary venue by 2006;
- To contribute to the regeneration of Belfast's north city centre through the arts and cultural sectors;
- To assist in the promotion of Belfast as an attractive cultural tourist destination, with 180 events during a twelve month period;
- To provide a showcase for the best local talent;
- To highlight the social, celebratory and enjoyable aspects of engagement with the arts;
- To appeal to less mainstream, less traditional and younger audiences; and
- To create employment for eight people.

The Black Box opened in April 2006, operating from rented premises on Hill Street, at the heart of the Cathedral Quarter. Since then, the venue has provided space for a diverse range of artistic programming, including live music, theatre, literature, comedy, film, visual art, live art, circus and cabaret, attracting over 30,000 people each year.

Despite its perceived success, its temporary nature and the imminent arrival of the MAC mean the future of the Black Box is uncertain. The Trust currently receives the minimum amounts of funding to keep the venue running from the Arts Council (£25,000), Belfast City Council (£25,000) and DSD (£11,000), each of which faces demands on their limited budgets from a range of organisations in the area including the MAC.

Oxford Economics were commissioned by the Black Box Trust in September 2011 to undertake a feasibility study into the future operation of the venue as a cultural and artistic events space in co-existence with the opening of the MAC.

The mission statement of the Black Box Trust is as follows:

“The Black Box is a vibrant arts space in the heart of Belfast’s cultural Cathedral Quarter. Affordability, accessibility and quality are key to the work and events we present. We believe in removing barriers to audiences and improving the ability of all to experience, enjoy and engage with the arts. We present work across the sectors including music, literature, theatre, film, comedy, live art and cabaret; and provide a high performance incubation space for emerging artists, curators and promoters to experiment and present their art form to audiences. As a not-for-profit arts venue, the Black Box has strong links with both community initiatives as well as Belfast’s highest profile festivals. We aim to continue to encourage the growth of Belfast’s creative talent, play a role in the city’s arts offer to all of its audiences and be a valued employer throughout the sector.”

1.2 Objectives of this study

The overarching objective of this study is to identify and evaluate the potential future options for the Black Box. The research has the following aims:

- Establish the strategic context for the Black Box, considering key stakeholder policy objectives and strategies at a local, national and international level;
- Assess the ‘need’ and ‘demand’ of the Black Box in relation to current infrastructure and resources, its location and audience performance;
- Evaluate the co-existence of the Black Box and the new Belfast Metropolitan Arts Centre (MAC) and the impact of long term stand alone sustainability of the venue;
- Identify and describe the options for development including requirements of scale and form of development;
- Identify potential income generating streams including consideration of private sources, trusts, foundations, gifting, corporate sponsorship, joint ventures and earned income;
- Consider governance and capacity building implications including mechanisms for the future operation of such a development;
- Establish a set of a set of clear recommendations including the preferred option showing outline costs, benefits and associated risk assessments with each option allowing for the development of a full economic appraisal; and
- Identify the possible implications of the closure of the Black Box with specific emphasis on arts provision and economic impact to the Cathedral Quarter and Belfast.

1.3 Report structure

The remainder of this report is structured as follows:

- Strategic Context:
- Assessment of Need and Demand
- Financial Analysis
- Governance
- Options for the way forward
- Conclusions and actions

2 Strategic Context

In assessing the strategic context for the Black Box, it is important to reflect on the 'fit' of the venue with strategies relevant to the development of the local arts and culture infrastructure in Belfast and Northern Ireland. In order to ensure these strategies were fully understood, Oxford Economics consulted with a number of local government departments and other key stakeholders. Table 2.1 below summarises the organisations consulted and the relevant strategy/policy documents reviewed.

Table 2.1: Key stakeholders and relevant documentation

Stakeholders/Consultees	Strategy/Policy documents reviewed
Arts Council for Northern Ireland (ACNI)	Creative Connections Five year strategy 2007 – 2012 Funding for the Arts 2011 – 2015
Belfast City Council	Cultural Tourism Strategy Integrated Cultural Strategic for Belfast Tourism
Department for Social Development (OSD)	Urban Regeneration Policies North East Quarter Master plan North West Quarter Master plan Budget 2011-15 Savings Delivery Plan
Cathedral Quarter Steering Group	Cathedral Quarter Five Year Strategic Vision and Development Plan 2011 - 2015
	Additional Documents
	Programme for Government (PfG)
	Regional Development Strategy 2011 – 2015
	Programme for Cohesion, Sharing and Integration (CSI)
Additional Consultees	
Local Business Owners	Detailed further in Section 4 – Assessment of Need and Demand
Festival and Promoters	Detailed further in Section 4 – Assessment of Need and Demand
The Metropolitan Arts Centre (MAC)	Detailed further in Section 4 – Assessment of Need and Demand
Similar art and culture performance spaces	Detailed further in Section 5 – Governance

In addition, we consulted with key business owners located in the Cathedral Quarter area. The purpose of this consultation was to develop a deeper understanding of the role of the Black Box in the Cathedral Quarter and its interaction with other local businesses in order to assess the 'need' for the continued operation of the venue alongside the arrival of the MAC. A questionnaire was also distributed to the Festivals and Promoters who use the Black Box to

gain their perspective on the role of the venue as a culture, arts and events space and understand its demand going forward in relation to the opening of the new MAC. This anecdotal evidence is detailed in section 3 (Assessment of Need and Demand).

We also consulted with another similar performance space, The Bongo Club in Edinburgh. The focus of these discussions was on the funding, organising and operating structure of these venues to compare and contrast with that of the Black Box. This case study information is included in section 5 (Governance).

2.1 Policy review

2.1.1 NI Executive

It is important to consider the future operation of the Black Box in light of a period of significant public sector cuts. The Northern Ireland Executive's four year budget (2011-2015) represents the most challenging spending review to face the government for over a generation.

The Department for Culture, Arts and Leisure was one of the hardest hit in the initial draft budget, with a 17.7% current expenditure reduction in real terms over four years. Although there was a slight increase in funding identified in the final budget, DCAL will encounter a 16.7% reduction in current expenditure in real terms over 4 years.

ACNI have a capital budget of £3.83 million in financial year 2011/12 which will reduce to £0.56m in financial year 2012/13 and will be further reduced in financial year 2013/14 to £0.45m.

The Department for Social Development was also affected by the plans to reduce overall public expenditure of £4 billion over the next four years. Starting with the Department's 2010/2011 baseline of £521.1 million, there will be an 18.2 percent increase in the additional cumulative revenue allocations between 2011 and 2015, as well as a 17.8 percent decrease in the proposed budget cuts over the four year period. This will result in a net income of 4 percent equating to £2.3 million. The Department's budget increase over the following four years is only 0.4 percent.

The impact of the final budget has increased competition for limited departmental and organisational budgets at a time when existing or planned capital projects will be looked after first. The budgetary constraints will also eliminate the potential for any new capital investments over the next four years.

2.1.2 NI Programme for Government

The Northern Ireland Programme for Government (PfG) sets the strategic context for annual budgets and the Investment Strategy for Northern Ireland (ISNI). The last PfG covered the period 2008-2011, detailing its vision prior to the current economic downturn. This being the case, it is unlikely that the commitments outlined with the programme will be delivered given the current budgetary constraints facing the public sector.

The new Executive is currently in the process of agreeing a new PfG; therefore we have considered the operation of the Black Box in light of the existing programme for Government given it is the most recently available statement of intent by the Executive.

The PfG aims to support business and to create conditions in which an enterprise can flourish. By ensuring greater levels of investment in arts and culture, the Government wishes to boost tourism numbers and ultimately improve the quality of life in Belfast. Through promoting access to arts and culture, the Government aims to meet educational, health and economic goals - enhancing Northern Ireland's attractiveness to locals and visitors. The overarching aim is to enable as many people, local or tourist, to access culture and arts in the area.

The Black Box is consistent with PSA 5 'Tourism' and PSA 9 'Promoting access to culture, arts and leisure'.

PSA 5 – Tourism

Aim: To develop our tourism sector and promote Northern Ireland as a must-visit destination to facilitate growth in business and leisure visitors

Two objectives outlined in PSA 5 are to:

- *Enhance Northern Ireland's tourism infrastructure; and*
- *Promote the growth of the tourism sector.*

PSA 9 - Promoting access to culture, arts and leisure:

Aim: Contribute to Northern Ireland's economic, health and educational goals by increasing participation and access to Culture, Arts and Leisure Activities

The most relevant objective set out in PSA 9:

- *Enable as many people as possible to improve their quality of life by experiencing, participating and accessing the excellence of our cultural assets.*

The success of the Cathedral Quarter in Belfast is testament to the fact that investment in culture and arts can be a catalyst for regeneration within city areas, transforming them into visitor destinations.

The regeneration of the listed bank building into The Merchant Hotel helped to increase the momentum of the Cathedral Quarter, coincidentally opening, along with its trendy bar/restaurant the Cloth Ear, at the same time as the Black Box, in April 2006. This added capacity for visitors and tourists to stay and participate in the cultural and artistic events on offer in the area. Since then, there have been numerous hotel openings in the Cathedral Quarter, including a Premier Inn and a Ramada Encore, adding to the tourism infrastructure of Belfast's 'Cultural Hub'.

The development of new venues, events and festivals is critical in changing the international perception of Belfast and attracting tourists from Great Britain and Europe. The Black Box has played a key role in organising a variety of events and festivals within the Cathedral Quarter and has been successful in attracting different audiences to the area, contributing to the objectives set out in PSA 5 and PSA 9. Furthermore, the presence of numerous hotels in the Cathedral Quarter automatically makes it an area of interest to visitors.

2.1.3 Regional Development Strategy

The Regional Development Strategy (RDS) provides a planning framework for the future development of Northern Ireland to 2025. Although the main focus of the RDS is not the culture and arts sector of Northern Ireland, it is identified as one of the key drivers to attracting public and private investment, particularly for business and regeneration initiatives.

The strategy recognises the arts and culture sector to be a key player in the enhancement of the environment and also for attracting tourism to key urban areas. The RDS aims **“to create a thriving Metropolitan Area centred on a revitalised City of Belfast to ensure that it can compete internationally as a place to locate business, work and visit. This will mean building a critical mass to ensure that it has higher order services, a range of facilities and cultural amenities”**.

The Black Box has been a popular cultural venue in the Cathedral Quarter since its opening in 2006. It has been a part of the revitalisation of the Cathedral Quarter area and has contributed to the diverse range of cultural and artistic attractions available in Belfast, attracting locals and visitors to its musical, artistic and creative events. The presence of the venue contributes to the Regional Development Strategy's aim to establish Belfast as a multifunctional centre and the continued operation of the venue would help to achieve critical mass of cultural amenities when the Metropolitan Arts Centre (MAC) opens in April 2012.

2.1.4 Programme for Cohesion, Sharing and Integration (CSI)

In July 2010, OFMDFM launched a new strategy, the Programme for Cohesion, Sharing and Integration (CSI), replacing the ‘Shared Future’ strategy implemented by the direct rule administration. CSI aims to ‘bring about real changes for people and places across our society’ and ‘to build a strong community where everyone, regardless of race, colour, religious or political opinion, age, gender, disability or sexual orientation can live, work and socialise in a context of fairness, equality, rights, responsibilities and respect’. Public consultation took place in the second half of 2010 and a report on the responses was published earlier this year.

The Black Box contributes to a number of the themes in the CSI, including the creation of shared space, respecting cultural diversity and supporting local communities.

2.1.5 North East Quarter Masterplan

In 2005, the Department for Social Development (DSD) published its North East Quarter regeneration Masterplan. The North East Quarter of the city, defined by the department comprises the Cathedral Quarter area, within which the Black Box is centrally located.

The Masterplan refers to **‘the need to increase the mix and quality of uses in the North East Quarter (NEQ)’** and emphasises the importance of **injecting other uses such as restaurants, bars, sports and arts facilities to enhance the day-long life of the area**.

The presence of the Black Box as an artistic and cultural performance space in the Cathedral Quarter has built upon the mix of uses the area has to offer. Located at the heart of the Cathedral Quarter, the venue is surrounded by a cluster of restaurants and bars, the numbers of which have grown since the advent of the Black Box in April 2006.

In consultation with DSD, the ‘Out to Lunch Arts Festival’ was cited as one of the most successful events organised by the Black Box as it brought people into the area during the day, where they could enjoy a show whilst having lunch. The department stated that with **“year on year events using it, it has added to the cultural offering of the area.”**

2.1.6 Cathedral Quarter Belfast Five Year Strategic Vision and Development Plan 2011-2015

Given the Black Box's central location within the Cathedral Quarter, it is important to consider how its operation 'fits' with the area's vision and plan for going forward.

The Cathedral Quarter Steering Group (CQSG) was formed in 2008 to analyse issues and opportunities and create a plan for the development of the Cathedral Quarter. The group's mission is **"to develop the Cathedral Quarter as the thriving hub of Belfast's cultural life"**.

The Cathedral Quarter Five Year Strategic Vision and Development Plan sets out four key priorities, each with their own set of objectives and targets. The priorities are:

1. To support the Cathedral Quarter as a centre for the arts and creative industries
2. To support the growth of the mixed-use economy in the Cathedral Quarter
3. To generate high levels of public participation
4. To build and maintain a supportive infrastructure

Within the first priority **"to support the Cathedral Quarter as a centre for the arts and creative industries"** there is an objective to **"stimulate public and private investment for venues"**, specifically identifying one of its key targets to include **"sustained operation of the Black Box as a crucial cultural venue."**

One of the big challenges the plan has identified over the next five years will be sustaining vital cultural resources such as the Black Box, in the context of fully supporting the MAC as it establishes itself. It also highlights the need for accessible and affordable space to develop its characteristic variety of cultural activity and offerings for everyone.

In consultation with a member of the Cathedral Quarter Steering Group (CQSG), it was evident that the presence of the Black Box was important to the area, stating that **"while the Black Box was set up originally as a temporary venue, it has created its own distinct identity. Both its nature, in terms of the events it hosts, and its location, in Hill Street at the heart of the Cathedral Quarter, are both very important"**.

The CQSG member also highlighted the need for a mix of art and cultural offerings in the area and that the opening of the new MAC would not affect the operation of the Black Box, stating **"the Cathedral Quarter needs a variety of venues, not just the MAC... The Black Box is clearly not a state of the art venue but it is very affordable which makes it very attractive to many events...It is the opposite of the MAC – its small, flexible and is suitable for edgy type performers."**

Overall the Black Box, in addition to the other local arts and culture offerings, and the upcoming opening of the new MAC, which will not only provide a monolithic landmark for the arts in the Cathedral Quarter, it will all help to firmly stamp the area as the arts, culture and creative hub of Belfast.

2.1.7 Strategies of the funders – Arts Council Northern Ireland

The Black Box has received funding from the ACNI, on an annual basis over financial years 2008-2011.

In light of the Executive's decision to re-instate a significant proportion of the organisation's budget, the ACNI's Annual Support for Organisations Programme (ASOP), which is open to all

art venues and groups, will be highly competitive. Therefore aligning the strategy and vision of the organisation is relevant to the future success of the Black Box and for gaining funding for financial year 2012.

The ACNI's current five year strategy, Creative Connections 2007-2012, focuses on four key themes, including:

- Art at the heart: promoting the value of the arts
- Strengthening the arts
- Growing audiences and increasing participation
- Improving our performance

The core to these themes is recognition of the contribution artists and arts organisations make to society and the need for support and development of the arts sector offering going forward.

The strategy states that art organisations are **'important cultural assets'** that form part of the basic infrastructure of the arts. It also highlights how regeneration of urban areas has benefitted arts and culture, resulting in audiences enjoying more opportunities to experience arts in a wider range of spaces and places.

In consultation with the ACNI, it recognised the role the Black Box has played in the arts and cultural offering of the Cathedral Quarter, stating **"it has provided a hub to the night time economy and they have a year round programme"**.

The ACNI also acknowledged that **"there are no other venues like the Black Box in Northern Ireland"** and **"it has attracted an audience that didn't exist before – quirky, young, experimental"**.

However, the ACNI reiterated the point that the Black Box was set up as a temporary venue and that funding by the Council was provided on that basis as it was not part of a regular funding programme. The Annual Support for Organisations Programme (ASOP) was identified as a funding option for the Black Box going forward, highlighting that the application process would be very competitive for limited pots of money and that capital projects would be prioritised. The alternative for the Black Box would be to apply for project funding under the Lottery funded programme which will be launched next spring.

The ACNI also suggested that if the Black Box wishes to move from its current temporary funding status to ongoing funding as an arts organisation, it would need to articulate as clearly as possible its artistic vision. This would assist funders to understand its ethos and the basis for the programme of activity that it offers. .

Overall the operation of the Black Box as an arts and culture performance space has advanced through the majority of key objectives set out by the ACNI's strategy. In particular it has improved recognition of the benefits arising from artists and performance spaces; it has contributed to the existing art infrastructure in the Cathedral Quarter; and expanded the range of opportunities for people to enjoy and participate in the arts.

2.1.8 Strategies of the funders – Belfast City Council

Similar to the ACNI, Belfast City Council has contributed annually to the funding of the Black Box over financial years 2008-2011 through its City Development fund. This fund was made

available at the discretion of the Council's director and committee members. It is typically used for 'one-off' or 'innovative' projects, however was made available to the Black Box on the basis of its nature as a 'temporary' arts and culture performance space until the arrival of the new MAC.

Given the Black Box will have to compete alongside other arts and culture organisations for funding for financial year 2012, provided through the Tourism, Culture and Arts Unit of Belfast City Council, it is important to consider how the operation of the Black Box complements the Council's new 'Integrated Cultural Strategy for Belfast' and its 'Integrated Strategic Framework for Belfast Tourism'.

Although the new 'Integrated Cultural Strategy is not yet in place, it will have an impact on future funding applications, in terms of criteria, and will be intrinsically linked to the decision process of the Council in awarding funding to organisations.

Building upon the Culture and Arts Plan in 2003, Belfast City Council has been working with the Department of Culture, Arts and Leisure and the Arts Council for Northern Ireland to develop and Integrated Cultural Strategy for Belfast.

The shared vision of the 'Integrated Cultural Strategy for Belfast' is:

"To create a vibrant, cultural capital where arts and culture are placed firmly at the centre of economic, social and environmental regeneration in a way which inspires, empowers and elevates those who live, work and visit the city"

The operation of the Black Box and its continuation as an arts and culture performance space complement the majority of objectives set out in the strategy, particularly in:

- The development of new and existing cultural products with particular focus on summer, evening and outdoor programming;
- Development of creative talent;
- The development of cultural quarters such as the Cathedral Quarter;
- Making culture more accessible and growing audiences;
- Showcasing talent and good practice;
- Enhancing and promoting cultural use of public spaces;
- Widening access and removing barriers to arts and heritage participation; and
- Diversifying audiences for the arts.

The Black Box has established itself as part of the arts and culture fabric of the Cathedral Quarter in Belfast. It attracts a range of events from small poetry readings to theatrical and musical performances and festivals. The venue appeals to a varied audience with attendance growing year on year. It was recently involved 'Culture Night', when the entire Cathedral Quarter area was cordoned off and pedestrianised for the evening, encouraging people to walk through the area and visit each of the venues hosting local performances.

In consultation with the Council, they recognised that ***"the Black Box has become a critical space...most events sell out - it has a very distinctive programme and a huge following"***. They also identified the Black Box as ***"the anchor venue of the Cathedral Quarter, the one to bring all the festivals in the city together."***

The Council also cited music as one of the key genres of their tourism strategy going forward with the MTV Europe Music Awards coming to Belfast. The Council aim to develop, support and grow music as a key offer that brings visitors to the city. Although the Black Box is a small venue hosting live music by mainly indigenous artists, the Council recognised its potential to contribute towards tourism in Belfast ***“through the number of visitors that use it and locals, it has a huge following”***.

This would complement the Council’s ‘Integrated Strategic Framework for Belfast Tourism 2010-2014’ under the banner of the Belfast Tourism: Gateway To The Future. This is the new framework to help Belfast and its tourism industry to benefit from continued growth in tourism, despite the economic downturn. It identifies ‘music’ tourism as well as ‘creative’ tourism as two of its key priority areas.

Although the council recognised the benefits of the Black Box has brought to Belfast in terms of culture and visitors, they raised the fact that they may not be in a position to sustain the level of funding (£25,000) they already provide to the venue.

The Council currently fund a significant number of organisations at £3,000 up to £150,000 and are aiming to bring their £3,000 threshold up to £10,000. This will mean shedding the small funding packages in an attempt to increase the amount the Council can fund overall.

The Council plan to extend their current funding to the multi-annual and annual clients for one year to be in line with their Culture Strategy:

“There will be a further fund that we will set up that is going to committee. We haven’t got a time for that fund yet, we are hoping for the next month and a half. The Black Box can apply for this and that will just be for one year, after that our multi annual funding will be open right across the sector, so this is just an interim year”.

According to the Council, the Black Box are well positioned to apply for this funding in terms of their audience numbers and their ability to deliver, assuming these are the criteria for the new funding which have not yet been set..

Although it is important to note that the Council’s ‘flagship’ projects will take up a significant proportion of the limited funds available for application.

2.1.9 Strategies of the funders – Department for Social Development

The Laganside Corporation provided the initial funds for the Black Box with the aim of regenerating the Cathedral Quarter area and the River Lagan. In 2007, DSD took over the Laganside Corporation’s functions and continued providing similar types of funding to the venue.

DSD fund the Black Box directly through the ‘Laganside Events Grants’ and indirectly through funding for events, such as festivals that are held within the Cathedral Quarter area.

The Department provided funding of £50,000 in the financial year of 2008 alongside equally matched amounts of funding from the ACNI and Belfast City Council for the Black Box to invest in a pizza oven and refurbishment of its Green Room to make it public facing and help generate a steady stream of income with the aim of making the venue more sustainable.

The main objective of the Department is to enhance the quality of life and well being for the residents of Northern Ireland by:

“Promoting strong sustainable communities where people want to live, work and socialise”

The Cathedral Quarter has undergone major investment in recent years in terms of improved public realm and increased business activity, making the area attractive to work in and visit. The Black Box is at the heart of the Cathedral Quarter and provides opportunities for a variety of audience types to socialise and enjoy the cultural activities on offer. The Department recognises that ***“anecdotally there is a lot of encouragement for the Black Box; people love it – the intimate nature and the type of acts that come to it”***.

Although the Department recognises the strengths of the Black Box in terms of bringing people together to socialise within the Cathedral Quarter, it is aware that the venue has relied heavily on the public funds provided over the course of its operation. In a period of public austerity and the imminent arrival of the MAC, the Department recognises that it is a ‘last chance saloon’ situation for the future continuation of the venue with added emphasis placed on the need for it to review its governance and provide evidence on its future sustainability.

2.1.10 Conclusion

Cuts in public spending have ushered in a new era, whereby the public sector in Northern Ireland is no longer in a position to provide the same level of support to the private and voluntary sectors as it did in the decade before the recession in terms of programme funding and capital investment. It is within this environment of public austerity that the Black Box currently sits and will be competing against other arts and culture organisations’ applying for future funding.

The concerns of the public sector funders of the Black Box surrounding the future operation and sustainability of the venue in the light of budgetary constraints and the arrival of the new MAC have been noted in previous sections, although it is worth addressing these in response to the success of the Black Box to date.

In early 2008 the ACNI, BCC and DSD agreed to fund the Black Box a total of £150,000 (£50,000 each) over three years. The DSD agreed to provide funding for improvement to the front space (Green Room) by way of improvements to its kitchen facilities (including a pizza oven) to the total of £12,000 and two months core funding for the year 2007/8 which totalled £38,000. The ACNI and BCC provided £25,000 each over the following two years.

A report was prepared by the Black Box in September 2011, providing evidence to DSD on the impact of their investment in the Green Room. It shows that there has been a return on the Department’s investment, with total income figures for the space increasing by just over 205% Q2 2007 on Q2 2011, which reflect pre and post works periods. It is recognised that the investment by DSD ‘directly increased sales’ but also catalysed further investment from the private sector, with Heineken funding improvement of the bar/service area to the amount of £1,000 in late 2010.

It should be noted that total income from the Green Room includes the revenue generated from hiring out the room and bar sales, in addition to the income provided by selling pizzas. Therefore, despite the closure of daytime trading as a café in early 2010, only opening Thursday to Saturday 5pm to 11pm, the investment in the overall refurbishment of the Green Room has not been a wasted opportunity as it has contributed to the success of it becoming a public facing space, generating additional income.

The Black Box has operated with the support of public funds since its inception. Taking into account, overheads such as the cost of renting the building amounting to approximately £70,000 per annum, it has managed to increase the level of income it generates year on year, from 51% in 2006/07 up to 82% in 2010/11. It is the aspiration of the Black Box to become 100% self-generating, however the challenging economic environment has impacted upon the business.

The Black Box venue operates with a proper governance structure in place, comprising Management Committee of Board Members, details of which are provided in Section 5 – Governance.

2.2 Policy summary

By way of summary, table 2.2 provides an overview of the policy and strategy documents reviewed and illustrates the links between each of their objectives.

Table 2.2: Summary of relationships between key policy/strategy objectives

The Black Box Strategy Analysis		Key objectives from selected strategies							
		Increase participation and access to Culture, Arts and Leisure activities	Enhance Northern Ireland's tourism infrastructure (through the arts)	Improve quality of life by experiencing, participating and accessing the excellence of our cultural assets	Establish the role of multi-functional urban centres	Keep pace with the artistic and cultural expectations of a modern society	Stimulate public and private investment for venues	Sustain operation of the Black Box as a crucial cultural venue	Improve people's experience of working, visiting and living in the Cathedral Quarter
Key Publications	Programme for Government Regional Development Strategy 2025	✓	✓	✓			✓		
	North East Quarter Masterplan				✓				✓
	Cathedral Quarter Belfast - Five-Year Strategic Vision and Development Plan 2011-2015	✓	✓	✓		✓	✓	✓	✓
	Arts Council Creative Connections - a 5 year plan for developing the arts 2007-2012	✓	✓			✓	✓		✓
	Belfast City Council 'Integrated Cultural Strategy for Belfast'	✓		✓					✓
	Belfast City Council 'Integrated Strategic Framework for Belfast Tourism'	✓	✓			✓			✓
	Department of Social Development Urban Regeneration				✓				✓

3 Assessment of Need and Demand

This section assesses the demand for the Black Box and its future operation, taking into account, current infrastructure and resources, audience figures and the arrival of the new MAC.

The activities of the Black Box and its performance, in terms of attracting audiences and events as well as its relationship with existing infrastructure and resources are examined under the following headings:

- Audience performance
- Audience diversity
- Links with local business
- Engagement with Festivals and Promoters
- The Metropolitan Arts Centre (The MAC)

In addition to the performance of the Black Box, we also address, in overview, the economic environment in Northern Ireland and Belfast and outline some challenges that the venue may face in the future.

3.1 Setting the scene

The year 2012 is cited as one of the biggest opportunities for tourism in Northern Ireland, with a range of events, celebrations, commemorations and projects coming on stream. The most relevant project in the context of this study is the completion of The MAC in April 2012. Other highlights include the opening of Titanic Belfast, the Giant's Causeway Visitor Centre, the Olympic & Paralympic Games 2012 Torch Relay, the Centenary of Titanic's Maiden Voyage, the arrival of the Clipper Round the World Yacht Race to Derry~Londonderry and the 50th Belfast Festival at Queens, all of which are envisaged to place Northern Ireland firmly on the global tourism map.

The Northern Ireland Tourist Board (NITB) *'ni 2012: our time our place'* emphasises the need to capitalise on these opportunities in order to 'drive visitor numbers' and 'generate economic impact'. NITB expect the '7 Big Events' of 2012 to contribute to the targets of the Draft Tourism Strategy 2010-2020 set out by the Department of Enterprise, Trade and Investment (DETI) to:

"Increase tourism spend to £1 billion by 2020" and ***"Increase visitor numbers to 4.5 million by 2020"***

NITB's estimates of the benefits potentially accrued, as a result of the 7 Big Events in 2012 over the period to 2015, would account for approximately 14% and 18.5% of DETI's targets to increase tourism spend and visitor numbers by 2020 respectively.

The Draft Tourism Strategy 2010-2020 is accompanied by a detailed action plan that includes timescales for achievement. The action plan covers the period to 2013/14 and sets out key areas of focus, one being 'targeted marketing' which identifies immediate future priority market segments including:

- City Breaks – especially event led short breaks;

- Culture/experience seekers; and
- Activity/special interest breaks especially music, golf, angling, walking, gardens, cruising and cycling.

Following years of investment and planning, it appears that the developments in 2012 are intended to provide a platform for attracting new visitors and creating opportunities to market Northern Ireland to new audiences.

The opening of The MAC in St. Anne's Square will play a significant role in attracting tourists into the Cathedral Quarter in 2012. The cluster of hotels, restaurants, bars and existing arts and culture performance spaces such as the Black Box, Oh Yeah Music Centre and the Crescent Arts Centre located in the area, will add to the overall 2012 offering and will also help in attracting the market priority market segments identified in the Draft Tourism Strategy's action plan.

3.2 The Black Box

The Black Box venue comprises a 'black box' room to house a range of artistic programming including live music, theatre, literature, comedy, film, visual art, live art, circus and cabaret, with the capacity to hold up to 240 guests. It also contains a 'Green Room' which has the capacity to hold up to 60 guests. This space is used for small events and meetings such as poetry readings and community group gatherings, but also acts as a 'night time' café serving pizza slices and drinks from Thursday to Saturday.

Aims and objectives of the Black Box:

“Increased access and participation is at the very centre of the Black Box Trust’s work. We aim to take the theatre out of theatres, for example, to remove the intimidation people feel, and place the arts experiences in a space which is social and relaxed.

By presenting arts in a less formal way, we believe we can greatly increase access to the arts and build audiences for the future.”

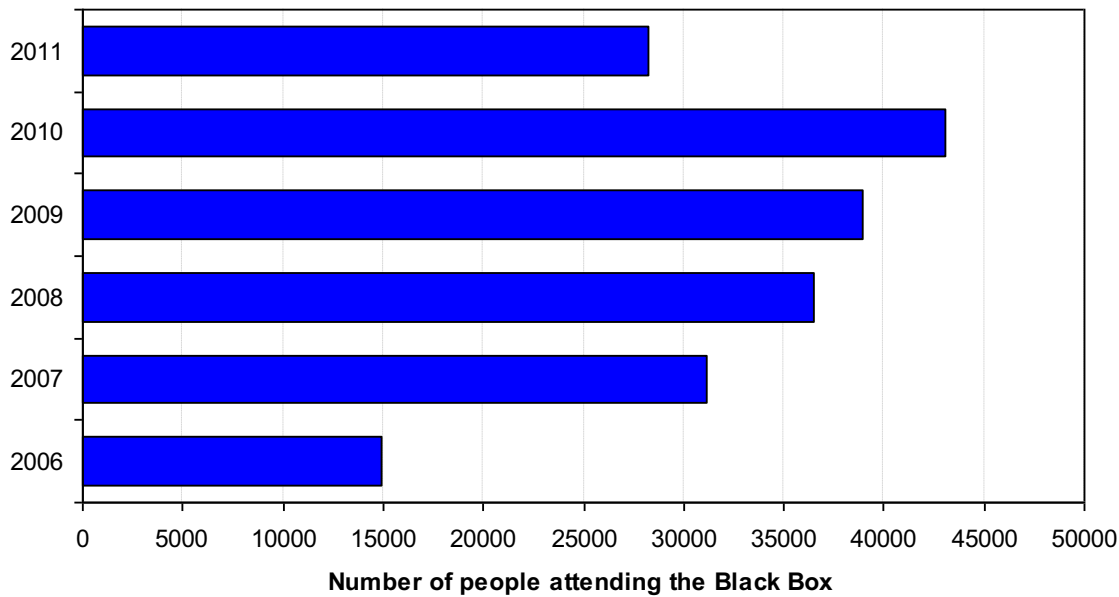
3.3 Audience performance

The Black Box opened in April 2006, operating as a temporary performance space, to address the major gap in the physical, artistic and cultural infrastructure pending the completion of the MAC. This was on the basis that on opening, the MAC development would fulfil the cultural and infrastructural needs of the Cathedral Quarter. However, the Black Box has become a very popular venue for visitors and tourists and has provided a mid-scale home for festivals and events in the city centre.

3.3.1 A growing audience

Winning the Fate Award for 'Best Newcomer' in 2007, the Black Box has attracted almost 193,000 people to the variety of events and activities it offers throughout each year since it opened its doors. Figure 3.1 below shows the number of people who have attended the venue each year.

Figure 3.1: Black Box annual audiences, April 2006-July 2011



Source: *The Black Box*

Note: Figures include people attending performances in and usage of the café in the Green Room

Note: 2006 figures represent audiences from April to December and 2011 figures represent audiences from January to July

Taking full years of operation of the venue, as the venue only ran for nine months in 2006, audience numbers have increased steadily between 2007 and 2010, rising from 31,150 to 43,000. This 38 percent growth in audiences over this period was not only remarkable for the Black Box as a new performance venue but also for the period of recession it operated in.

The contagion of effects as a result of the recession was felt by the majority of households in Northern Ireland. The housing market crash in late 2007/early 2008, where prices plummeted by almost 50 percent, coupled with rising unemployment and increasing fears over job security, had a detrimental affect on consumer confidence and spend.

In uncertain economic times, consumers tend to rein back their spending on 'luxury' items or leisure activities, such as theatre tickets and concert seats as they are seen as an 'indulgence', and to save a greater proportion of their disposable income.

There was overall consensus from the consultations that the Black Box was "**good value for money**". As a "**niche and cheap**" venue it has managed to attract a growing audience. Perhaps, this is part of the Black Box's charm, offering quality entertainment on a budget has stimulated demand for the venue with "**tickets for most events selling out**".

This is likely to be the trend going forward, given the mass of pay freezes within the public and private sectors, the escalating rate of inflation and lack of job opportunities. These are all factors putting downward pressure on household incomes.

It appears that the Black Box has created its own demand for the events it hosts as it provides visitors and tourists the opportunity to enjoy the arts and cultural activities at relatively low prices. Furthermore, in the current economic environment we are living in, where increasingly people are demanding more 'value for money', has dictated the 'need' for an affordable performance space such as the Black Box.

“The size of it (The Black Box) is what makes it work and the price – its not expensive, very seldom are you talking £20 in there, more likely £10-£12, sometimes £5-£6, which is a very cheap night out these days. The venue adds enormously to the area.” Nick Price of Nick’s Warehouse restaurant, Cathedral Quarter Belfast.

3.3.2 A range of events

The Black Box programmes and is involved in the organisation of different artistic performances and cultural events throughout the year. Located at the heart of the Cathedral Quarter it benefits from the wide range of festivals held in the area, such as Culture Night, Outburst Queer Arts Festival, Out to Lunch, Belfast Film Festival and Open House Festival. Table 3.1 below provides an overview of the events by type for each year since the Black Box opened.

Table 3.1: Events at the Black Box, April 2006-July2011

Event type:	2006	2007	2008	2009	2010	2011	Total
Comedy	5	15	17	12	21	21	91
Literature	8	30	29	22	7	1	97
Theatre	17	23	23	18	24	9	114
Charity & Family	7	21	14	13	14	8	77
Music	77	133	181	186	234	172	983
Other	25	29	25	44	28	16	167
Film	10	23	31	12	8	18	102
Visual & Performance Art	11	2	8	3	8	4	36
Dance	1	0	3	9	18	15	46
Circus & Cabaret	1	3	10	7	6	0	27
Words & Ideas	0	3	0	3	19	9	34
Total	162	282	341	329	387	273	1774

Source: *The Black Box*

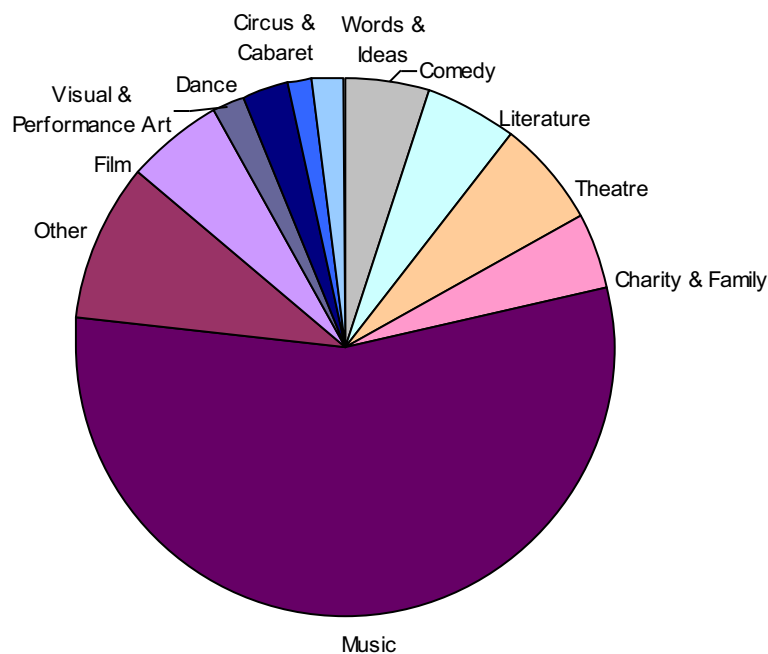
There have been almost 1,800 events held in the Black Box between April 2006 and July 2011, 55 percent of which fall within the music event category. Over the years, the Black Box has built up its reputation as a popular music venue, giving indigenous artists the opportunity to perform. Music has been the most successful art form for the Black Box in terms of meeting its overall objectives as a temporary venue. It has showcased the best local talent such as ‘Cara Dillon’ and has attracted less mainstream, less traditional and younger audiences by putting on performances from rock and punk bands such as ‘Black Sunday’. The proportion of music events to total events has grown from 47% in 2006 to 63% in 2011.

Since April 2006, the Black Box has successfully programmed approximately 22 percent of the total events it hosts, approximately 69% of which have been music related. The Black Box’s curation of music events has grown steadily from 62% (of total curated events) in 2006 to almost 71% in 2011, an increase of 9%.

The majority of consultees indicated that the Black Box fulfilled the 'need' for a small music venue, stating that *“every town should have some type of small venue that is not specifically a pub, but like a small performing arts centre, the Black Box works really well as a music venue, it is intimate”*. Nick Price of Nick’s Warehouse restaurant, Cathedral Quarter Belfast.

As well as becoming popular for music events, the Black Box is home to many Festivals , which encompass a variety of activities, including music, but also film, theatre, comedy and other activities, which collectively account for just over 26 percent of the events organised by the Black Box over the last five years. Figure 3.2 below illustrates the proportion of total events by type.

Figure 3.2: Proportion of total events by type, April 2006-July 2011



Source: *The Black Box*

Growing demand to watch and listen to local artists in an intimate setting has defined small music events as the Black Box’s speciality, catering for all tastes from punk rock to country and western styles. Approximately 59 percent of the total audience over the last five years have attended the venue specifically for this type of experience. The relaxed nature and character of the venue, coupled with its location on Hill Street, which was identified as Google’s fourth trendiest street in 2011, make it appealing to audiences who enjoy socialising and eating out in the cluster of restaurants in close proximity.

3.4 Audience diversity

It has been widely commented throughout consultation with key stakeholders that the Black Box has ***“created its own identity”, “its own type of audience”, “it appeals to most people - the audience is bohemian, eclectic and quirky”***. DSD, ACNI, Audiences NI, CQSG

To determine whether these perceptions provided a true reflection of the type of audience the Black Box attracts, we requested a mosaic analysis from Audiences NI to profile the characteristics of those who had attended the venue between August 2008 and October 2011.

The mosaic information was provided based on the names and addresses of all the accounts within the Black Box’s Worldpay booking system. It did not include any mailing list data, door sales or through other ticket sellers. It is worth noting that a significant proportion of tickets are likely to be sold at the door of the venue, therefore the actual size of attending audiences will be greater and may boost the details of characteristics within certain groups.

The dataset was de-duped and then compared against Mosaic Northern Ireland for demographic profiling. Further details of the analysis provided by Audiences NI, is provided in Annex B.

3.4.1 What sort of people booked at the Black Box in Belfast?

At least 0.6 percent of the households, who booked their tickets for events in advance online, in Northern Ireland, attended the Black Box between August 2008 and October 2011. Approximately 70 percent of these households fall within four main Mosaic NI Groups, namely ‘Wealth and Wisdom’, ‘Better Off Families’, ‘Ageing Suburbanites’ and ‘Students and Singles’. Table 3.2 below provides an overview of the nine main groups representing the types of audience attending the Black Box.

Table 3.2: Mosaic NI Groups attending the Black Box, Aug 2008-Oct 2011

Mosaic NI Group	Number of Household bookers since August 2008	% of household bookers since August 2008	Overall NI Households	NI Household Penetration
A Wealth and Wisdom	918	22.7%	50,222	1.8%
B Better Off Families	499	12.3%	64,586	0.8%
C Ageing Suburbanites	745	18.4%	120,127	0.6%
D Younger Nestmakers	256	6.3%	67,847	0.4%
E Small Town Renters	202	5.0%	79,421	0.3%
F Students and Singles	688	17.0%	42,453	1.6%
G Poor Seniors and Solos	230	5.7%	68,186	0.3%
H Housing Exec Tenants	252	6.2%	111,215	0.2%
I Farming Communities	259	6.4%	108,715	0.2%
Total	4,049	100%	712,772	0.6%

Source: Audiences NI

'Wealth and Wisdom' groups generally live desirable locations around Belfast such as North Down, East Antrim and South and East Belfast, which experience little deprivation. Typically they are married couples, aged 46 years and above, with older or grown up children. They are generally educated to a degree level with strong professional and technical skills and earn high incomes. Most of their homes are semi-detached or detached and owned outright. Generally they are interested in antiques/fine art, golf, wine and listening to classical music.

'Better Off Families' are predominantly aged between 45 and 64 years with children. They are highly focussed on home and family and tend to live modern housing they own with a mortgage, in areas around Lisburn such as Strangford and Lagan Valley. Stereotypically, the breadwinner of the family is a high grade professional working in the service sector, earning an annual salary of £50,000 upwards. Their general interests consist of bird-watching, golf and country pursuits.

Groups of **'Ageing Suburbanites'** tend to live in semi-detached housing in locations surrounding Bangor. Typically they are aged between 45 and 64 years, working in intermediate roles within the public sector and earning an annual salary between £25,000 and £49,999. Most are married couples with children who either no longer live at home or are still living at home, contributing to the household income. Their leisure activities generally include cycling and eating out.

'Students and Singles' are generally undergraduates or graduates who are well educated but have low incomes, earning on average £7,500 to £13,499. They are usually aged between 18 and 24 years, are single or co-habiting in a variety of house types in and around the main arteries leading to Belfast. Stereotypically, the group are socially and politically aware but

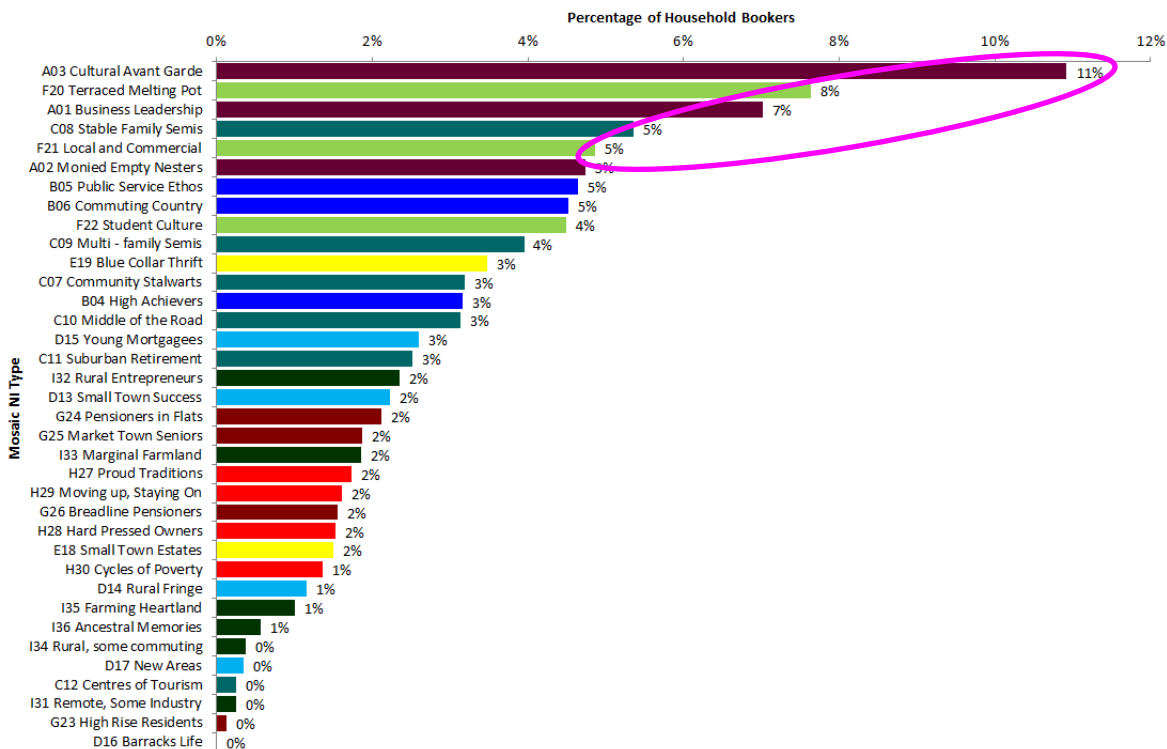
financially carefree, with above average levels of unemployment. They tend to frequent cafes and bars and enjoy cinema/films and rock music.

Over the last three years, the Black Box has attracted an above average level of **'Wealth and Wisdom'** and **'Students and Singles'** groups compared to other Belfast arts venues, bringing 23 percent of household bookers compared to 14 percent, and 17 percent compared to 7 percent respectively. This Comparison is based on an analysis of twelve Belfast based arts organisations connected to Audiences NI's Vital Statistics data analysis software across a three year period.

3.4.2 Audience 'Typology'

Whilst the Mosaic NI Groups provide a more general top level view of audience characteristics, looking more closely at the Mosaic NI Types provides a clearer indication of specific audience traits. Figure 3.3 below details the different 'type' of audiences who have visited the Black Box. Each of the thirty-six types are alphabetically and colour coded according to the nine 'parent groups', previously illustrated in table 3.2.

Figure 3.3: Mosaic NI Type of audience attending the Black Box, Aug 2008-Oct 2011



Source: Audiences NI

The 'Cultural Avant Garde', 'Business Leadership' (both part of the 'Wealth and Wisdom' Group) and the 'Terraced Melting Pot' and 'Local and Commercial' (both part of the 'Students and Singles' Group) make up four of the top five types of household booker attending the Black Box, defining the characteristics of the audience the venue attracts. Box 3.1 below details the typology of the Black Box audience.

Box 3.1: The Black Box audience typology

The Cultural Avant Garde are well educated people working in 'newer' professions such as information technology, arts and entertainment, leisure services, advertising and marketing and the caring professions, earning an annual salary of £50,000 upwards. The city is an exciting focus for these people for leisure activities as well as employment, with most living close by, South and East of Belfast. This young middle-class are typically aged 25-44 years, married or co-habiting with children slightly younger than those living in the more peripheral upmarket suburbs. People in Cultural Avant Garde tend to be busy, and foreign travel and eating out consume a higher than average proportion of household income. Many participate in sports and visit fitness centres and are more likely to visit the cinema where they watch avant garde films opposed to mainstream blockbusters.

Business Leadership contains people who have benefited from degree level education, likely to be supplemented by higher educational or professional qualifications. They have led highly successful careers, earning upwards of £50,000 per annum and tend to live in the most exclusive and expensive neighbourhoods in Northern Ireland. Typically, they are aged between 45 and 64 years and married, with teenage or grown up children either at university or advancing their own professional careers. Approaching retirement age much, of their discretionary time is spent on charitable and community activities and engaging in and supporting the arts.

The Terraced Melting Pot contains a cosmopolitan mix of young professionals and students, living in privately rented, post-industrial Belfast terraced housing, ideally located in close proximity to universities and new professional jobs. The peak age group for living in these neighbourhoods is 25-29 years, having largely completed formal education but are not ready to start lifelong relationships. Generally these people are interested in spending their money on experiences such as the arts, eating out or holidays and many will practice a performing art themselves.

The Local and Commercial contains many single people, both young and old, who live in small apartments in large old Victorian houses, or above shops, often located in the city centre or along important radial arteries. There are disproportionate numbers of single people and childless couples, including students and other young singles, but also lifelong singles, co-habitees and significant numbers of people who have come out of long term relationships. The peak age group is 25 – 29 and occupations are usually within sales and customer services and hotels and catering, with annual earnings under £7,499.

The mosaic analysis confirms the type of audience perceived to attend the Black Box - they are a mix of young, affluent, mature and artistic type people. In describing the range and diversity of the audience, one consultee stated that ***“the venue attracts the young guy with a fiver in his pocket and then you get the sophisticated type, who is most likely a millionaire, through the door.”*** Willy Jack of the Duke of York, Cathedral Quarter Belfast

3.5 Links with local business

To gain a deeper understanding of the role of the Black Box in the Cathedral Quarter and its interaction with other local businesses, we consulted with local business owners to qualify the ‘need’ for the continued operation of the venue and to establish what impact they expect the MAC to have on the Black Box and the local area.

We consulted with restaurateur Nick Price of Nick’s Warehouse and publicans Willy Jack of the Duke of York and Gerry White of the John Hewitt, all of which have been running their businesses within the Cathedral Quarter for the last ten to twenty-five years.

Since they set up their businesses, they have witnessed massive changes in the Cathedral Quarter area, particularly over the last decade as it has been transformed by regeneration and has benefitted from increasing business activity, becoming one of the most popular places to visit and socialise in Belfast.

“The Cathedral Quarter was a rundown, scary place and now it is a vibrant and exciting area” Willy Jack of the Duke of York, Cathedral Quarter Belfast

The opening of the Black Box has played a significant role alongside the other local businesses in changing the perceptions of the Cathedral Quarter area, attracting people in to attend its year round programme of arts and cultural events, which has encouraged people to eat and drink in nearby restaurants and pubs and stay in the range of hotels situated in the area.

“The impact of the Black Box’s existence has been huge – it plays a large role in all the festivals” Gerry White of the John Hewitt, Cathedral Quarter Belfast

“It has helped to increase the number of visitors and tourists to the area and has encouraged residents from across the boarder to stay long weekends” Gerry White of the John Hewitt, Cathedral Quarter Belfast

It was also evident from the consultations that the Black Box has not only added to the cultural offering of the Cathedral Quarter but has also become a valued member of the business community. The festivals the venue is involved in and the events it hosts bring benefits to all the local businesses. They are considered to be well organised and attract the “right type” of people to the area, maintaining it as a safe place to socialise, as well as providing additional revenue through chance/passing trade.

“Culture Night was amazing, fantastic; closing off the Cathedral Quarter area made a huge difference and made it better than the year previous. The area was totally bunged but there was no trouble, the place was safe” Gerry White of the John Hewitt, Cathedral Quarter Belfast

“The Black Box has benefitted our business by approximately 5%” Willy Jack of the Duke of York, Cathedral Quarter Belfast

“The Black Box has certainly benefitted our business. It has brought people into the area, particularly in January when they have the ‘Out to Lunch’ Festival, the only January festival in Europe which is brilliantly organised and draws people in pre and post events for drinks” Gerry White of the John Hewitt, Cathedral Quarter Belfast

“...they bring a huge element of ‘chance’ custom; we may only have 20 people booked and actually do 80.” Nick Price of Nick’s Warehouse, Cathedral Quarter Belfast.

“The Black Box events and festivals bring approximately 10 to 15 percent additional business” Gerry White of the John Hewitt, Cathedral Quarter Belfast

There was overall consensus that the Black Box had created its own audience based on the types of events it hosts. It was recognised as becoming an increasingly popular music venue, offering performances from country and western style artists to rock bands attracting a mix of audience characteristics – young, mature, quirky, sophisticated.

The Black Box was also described as being ‘relaxed and intimate’ with all types of performers ‘getting the chance’ to perform.

“The Black Box is experimental and hosts all kinds of events and performances from people from all backgrounds, giving once marginalised groups the opportunity to perform” Willy Jack of the Duke of York, Cathedral Quarter Belfast

The upcoming arrival of the MAC to the Cathedral Quarter was welcomed by the consultees, agreeing that ***“anything that adds to this area as a cultural hub for the city and keeps that aura of quality about it is good”*** Nick Price of Nick’s Warehouse, Cathedral Quarter Belfast.

The MAC was also expected to have a positive effect on the local area ***“The MAC will have a brilliant effect on the Cathedral Quarter, top-notch exhibition galleries, everyone in the area should benefit from its location”*** Gerry White of the John Hewitt, Cathedral Quarter Belfast.

Consultees all agreed that there was a place for the Black Box to exist alongside the MAC as the two venues would provide different offerings to different audience types and would not be in direct competition with one another.

“The Black Box and the MAC can co-exist if they keep it focussed on their specialities. The MAC has always been about drama and performance art, whereas the Black Box to me has always been about music, of which the offering is fantastic” Nick Price of Nick’s Warehouse, Cathedral Quarter Belfast.

“The Black Box and the MAC wouldn’t run in competition – each will provide a different offering. The MAC will have more well-known shows and performances, whereas the Black Box brings in up and coming bands that no one has heard of but are class. Both could definitely work independently and complement one another” Gerry White of the John Hewitt, Cathedral Quarter Belfast.

However, it was highlighted that if it was decided that the two venues could not co-exist and the Black Box was to close ***“it would decrease turnover and the impact on the area would be dramatic”*** Willy Jack of the Duke of York, Cathedral Quarter Belfast.

It was agreed across all of the consultations that the Black Box had complemented the existing infrastructure and resources of the Cathedral Quarter area and that the Black Box would be missed if it was to close.

“We want to keep the area (Cathedral Quarter) unique and the Black Box adds to this and if we lose it, that’s something that makes up what has now become Belfast’s most popular venue” Nick Price of Nick’s Warehouse, Cathedral Quarter Belfast.

Based on the evidence gathered during the consultations with local businesses, it appears that the Black Box has played a key role as an arts and culture performance space and as a member of the local business community in the Cathedral Quarter. It has attracted people to the area, creating a spillover effect in terms of increased trade for local proprietors, and the fact that its presence would be missed if the venue was to close, suggests that there is a need for its future operation locally, in complementing existing infrastructure and resources.

While the MAC is expected to have a positive effect on the Cathedral Quarter, it is also considered to be very different from the Black Box in terms of the type of events it will host and the audiences it will attract, suggesting that the two venues could co-exist.

3.6 Engagement with Festivals and Promoters

To better understand the role of the Black Box as an arts, culture and events space, we distributed a questionnaire to a selection of Festivals and Promoters who use the Black Box to showcase their acts/performances. We also wanted to identify the Black Box’s strengths and weaknesses, as well as gauge the need for the venue and what impact the arrival of the MAC would have on its future operation.

The Festivals and Promoters who provided feedback to the questionnaire use the Black Box for events, acts and activities of all genres throughout the year.

The flexibility of the venue, its location, size, versatility and affordable prices were identified as key strengths of the Black Box.

“The Black Box has many strengths and attractions to a festival organisation like ours. There is no other Belfast venue that is so flexible in terms of concert seating/standing arrangements. It has a fantastic location on Hill Street which is right in the heart of the Cathedral Quarter and in terms of size, it allows us to programme small and mid-scale – and therefore affordable - festival events. The Black Box is crucial to our festival needs and unique in its informal atmosphere which is paramount to any music or arts event”
Kieran Gilmore, Director of Open House Festival.

“It (the Black Box) is the most welcoming and accessible venue in Belfast, with down to earth and friendly staff... The staging area is very versatile and it’s great having flexibility with seating arrangements and styles. The location is excellent, right in the heart of the city but with a lovely hidden-away gem feel to it. The price is always reasonable as well”
Ruth McCarthy, OUTBURST Queer Arts Festival

Since its opening the Black Box has become well known within the arts and culture sector and given its growing audience base and the lack of similar venues in Northern Ireland, Festivals and Promoters are keen to showcase their events and acts at the venue throughout each year. In some instances, it is the only venue that Festivals and Promoters will consider.

“The Black Box has a feel and an atmosphere that both artists and audience love. It is always the first venue I consider when booking an artist to play in Belfast. It has become

a centrepiece for the arts in the city with a wide ranging programme of events all year round” Darren Smyth, Independent Promoter, Strange Victory

“The Black Box has been a real asset to the performing arts community and its audience since it opened” Brian Carson, Promoter, Moving on Music

“There are no other alternatives in the vibrant arts and cultural flavoured Cathedral Quarter, which is the new heart and soul of a resurgent Belfast city centre” Kieran Gilmore, Director of Open House Festival.

The only weakness of the Black Box pinpointed, was that it did not have a full licence which was considered to be restrictive in terms of the time that could potentially be spent socialising in the venue following performances but also in terms of generating income which could be used to move towards greater sustainability.

“The lack of a full (and late) alcohol license represents its only weakness. It is a busy arts venue but it is also a very important and strategic meeting place and any such restrictions such as limited serving times put it at a disadvantage with other venues in Belfast” Kieran Gilmore, Director of Open House Festival.

“The licensing issue is of course the Black Box’s biggest weakness...the amount of revenue they could generate is severely curtailed. With a full licence I feel The Black Box would go some way to becoming more self sufficient in terms of not having to rely so much on outside funding. I can understand the reservations from local publicans over granting a full licence to The Black Box but I would actually say that footfall and overall spend has increased in the Cathedral Quarter since the venue opened in 2006” Darren Smyth, Independent Promoter, Strange Victory

Based on the feedback from the questionnaires, it is evident that the Black Box has increasingly become a key arts and culture space in the Cathedral Quarter, particularly to Festivals.

“Open House Festival was the first festival to take place in the Cathedral Quarter, long before the Black Box opened in 2006 but since then it has established itself as the single most important venue to our festival” Kieran Gilmore, Director of Open House Festival.

“It is almost the optimum size for a venue, its location is great, sightlines and acoustics and excellent, it is extremely versatile, it is affordable to hire and the staff are extremely welcoming and accommodating. I could do with 3 Black Boxes during the Festival period” Sean Kelly, Director of Cathedral Quarter Arts Festival and Out to Lunch Festival.

The Festivals and Promoters share similar views to the local businesses consulted, regarding the upcoming arrival of the MAC to the Cathedral Quarter and the impact it will have on the Black Box. While there was overall consensus that the MAC would bring benefits to the arts and culture sector, it was evident that the Festivals and Promoters did not want its arrival to result in the closure of the Black Box; instead, they would prefer the two venues to both exist with some suggesting they would consider using the MAC for some the events they run.

“I would like to see both venues (the Black Box and the MAC) co-existing and co-operating together which would be a positive thing in terms of audience choice and spotlighting Belfast as a real city of culture” Darren Smyth, Independent Promoter, Strange Victory.

“I think the only effect will be a positive one for both organisations in that it will create a critical mass of people in the area who are drawn to the arts and entertainment. Both

spaces can complement each other” Sean Kelly, Director of Cathedral Quarter Arts Festival and Out to Lunch Festival.

All parties agreed the Black Box would be different to the MAC in terms of its current involvement in Festivals and acting as a platform for upcoming talent, roles that are not envisaged to be fulfilled by the MAC.

“I don’t honestly see the MAC as being a space that is about nurturing talent and new ideas, and that’s fine, it can be something else. Black Box is about risk taking and going with the flow of what’s interesting in the world” Ruth McCarthy, OUTBURST Queer Arts Festival

“We cannot envisage a future without the Black Box and a theatre venue such as the MAC will not fulfil the same crucial role, if in fact it fulfils any role within our festival” Kieran Gilmore, Director of Open House Festival.

Based on the all the feedback gathered from the Festivals and Promoters, it is evident that the Black Box has played a key role in providing a key performance space for arts and culture events that is flexible, accessible, versatile, affordable and optimally sized, with the only downside not being fully licensed. Whilst the majority recognise the benefits of the MAC as an addition to the arts and culture offering in the area, they see the need for the two venues to exist going forward.

3.7 The Metropolitan Arts Centre (MAC)

To determine the artistic programming for the MAC and whether it would be in competition with the Black Box, we consulted with its Chief Executive and Director of Programmes.

The MAC is in the process of finalising all aspects of its programme in advance of its sales launch in January and its opening in April next year. They were able to confirm that they would be hosting a range of events under broad categories such as visual art, theatre, dance, comedy and live music.

The team behind the MAC originate from the Old Museum Arts Centre (OMAC) and are working collaboratively with other similar venues such as the Grand Opera House in Belfast, where they have agreed a joint marketing strategy. In addition, they have collaborative working practices with the National Theatre of Scotland and Theatre Wales, Tate, all NI festivals and almost all local producers across the artforms.

The MAC view themselves as a totally different entity to the Black Box. The case for the creation of and funding (capital and revenue) for The MAC has been framed in the context of developing a world-class state-of-the-art venue that will drive significant footfall into the city centre. They were reluctant to link the opening of The MAC with the closure of any arts organisation, including the Black Box, but noted that by establishing the argument for its initial funding as a temporary venue in advance of the arrival of The MAC, the Black Box had defined itself in relation to The MAC in terms that have proven unhelpful for both parties.

The MAC has specific targets, such as attracting 177,000 visitors each year, and will be operating in a competitive rental market. They reiterated the importance of focussing on their own business development and engaging a new audience, as they are establishing an entirely new business in a difficult economic environment. This will automatically place them in competition with all arts venues and leisure facilities in Belfast and Northern Ireland overall.

“Everyone is competition – Island Arts Centre in Lisburn, the Black Box, Nick’s Warehouse”

Plans for the upcoming opening of the MAC were not revealed in detail as the information was commercially sensitive and it is common practice not to share such information in advance of the sales launch in January. However, it was evident that the venue would be competing for similar events currently hosted by the Black Box stating ***“we will have a customer focussed music programme”***. Focussing on targets for delivery, the MAC will negotiate their costs for specific events it really wants to host.

Although for commercial reasons the MAC’s programming and pricing information was not available at the time of consultation in order for us to gauge the degree to which it will be ‘competing’ with the Black Box, it is clear that the MAC will inevitably be in competition with many providers, both arts venues and commercial venues, given the broad range of programmes and activities that they will be offering.

In any case, the offering of the two venues is likely to be quite different. The Black Box tends to host one-off music and other events that are less mainstream, supporting indigenous artists, whereas the MAC, aspiring to be a ‘world-class state-of-the-art venue’ may showcase longer runs of artists that are better known to audiences. It is our view that the each will provide a different offer of performances and events in two very different venues, giving audiences a greater choice. It is important therefore for the Black Box to articulate clearly its artistic vision so that it is clear to potential funders what it is about and where it fits in the spectrum of provision.

It might be argued that the Black Box is more in competition with other licensed pubs and bars that offer live entertainment, such as the Limelight and others. However, on the basis of the evidence we have gathered, it is our view that the Black Box is not in direct competition with other pubs/bars, in that it is an arts and culture performance space first and foremost, only facilitating the selling of alcohol, as a complementary feature to generate additional income.

Furthermore, the licensing of the venue restricts the serving of alcohol to only when performances are put on and only between the hours of 5pm to 11pm. In addition, the building is only permitted to be used as a ***‘mixed performance venue for live music, comedy and other events’*** under the Use of Planning (Use Classes) Order (NI) 2004. Therefore it does not operate as a bar that hosts music events, which are typically occasional; it is an arts and culture space that serves alcohol when acts perform.

Anecdotal evidence suggests that there are no comparable venues in Belfast or Northern Ireland and that the Black Box is unique in its size, flexibility, versatility and location. The latter being of particular importance given that it is based centrally within the Cathedral Quarter, renowned for being ‘Belfast’s Cultural Hub’. Also, the consultations with local businesses supported the fact that the Black Box was not in competition with them and were unable to suggest who might be, with one stating the ***“Black Box complements other local businesses. They hold events that we could not facilitate and are adaptable to all types of events”*** Gerry White of the John Hewitt, Cathedral Quarter Belfast.

The following section concludes the key findings from the consultation phase and provides an overall assessment of the need and demand for the venue going forward.

3.8 Conclusion

Based on the results of the audience analysis, showing year on year growth in the numbers attending the Black Box for various performances and events, and the information gathered through consultations with local businesses and Festival and Promoters, there is clear evidence of demand for the venue going forward.

The location of the Black Box is one of the key factors in its success, nestled amongst popular places to socialise and eat out. In addition, its flexibility and versatility as a performance space and its affordable prices were all cited as strengths of the venue.

Since its inception, the Black Box has been a platform for indigenous artists and performers and grown in popularity based on the types of events it hosts. The venue has created its own audience, a mix of young, affluent, mature and artistic type people, who will not simply transfer to the MAC once it opens.

It is important to have something unique like the Black Box – yes, we are getting the MAC but at this stage it is an unknown quantity” Nick Price of Nick’s Warehouse, Cathedral Quarter Belfast.

“The Black Box has created its own audience; those people would not transfer to the MAC if the Black Box was to close” Gerry White of the John Hewitt, Cathedral Quarter Belfast.

While it was originally established as a temporary venue to exist until the MAC opened, the Black Box has successfully created its own niche with its own very supportive audience. Although, the MAC will be running its own live music programme which will potentially provide some of the same product as the Black Box and draw on some of the same audiences, the level of crossover between them is likely to be low. According to the latest annual Audience Review by Audiences NI, the majority of arts organisations have a low level of crossover between them, at 38% in Northern Ireland.

It is worth pointing out that the MAC is a completely different type and scale of venue and will be competing with a whole range of other venues for all the types of activities on offer, which will widen the choice of audiences. It is our view that the two venues (the MAC and the Black Box) are not directly comparable, although they are intended as arts and culture performance spaces; they are completely different in terms of scale, output and customer experience.

4 Financial Analysis

4.1 Overview

The accounts of the Black Box show that turnover at the venue has more than doubled since it opened in 2006 from just over £160,000 to around £360,000 in the year ended March 2010, an increase of over 120% (see Table 4.1 below). (Audited accounts are not yet available for the financial year 2010/11.) All of the growth has been in the contribution of trading activities which is over 3.5 times greater than in the first year of operation. As a result, the company has reduced its grant dependency and almost 82% of income was self generated in 2009/10.

Table 4.1: Income & Expenditure Account for Black Box, 2006/07 to 2009/10

	2006/07	2007/08	2008/09	2009/10
Incoming resources:				
Grants	80,000	88,100	81,545	65,000
Contribution from trading activities	81,690	153,619	237,142	293,230
Total incoming resources	161,690	241,719	318,687	358,230
<i>Self generated income</i>	<i>50.5%</i>	<i>63.6%</i>	<i>74.4%</i>	<i>81.8%</i>
Resources expended:				
Charitable activities	158,589	237,495	360,971	356,634
Governance costs	3,007	5,368	3,232	3,300
Total resources expended	161,596	242,863	364,203	359,934
Net income /(deficit) for year	94	(1,144)	(45,516)	(1,704)
Adjustment			6,072	
Total funds carried forward	94	(1,050)	(40,494)	(42,198)

Source: Annual Accounts

For the first four years of operation, the company did not make a profit on its operations (except for a very small surplus in the first year). However, losses were small with exception of a large deficit of over £40,000 incurred in 2008/09. This has been attributed to:

- an overspend on the renovations to the kitchen area,
- the new cafe taking a while to bed in resulting in wages increasing faster than income, and
- there were a couple of self promoted shows with large outlays which did not do as well as expected.

The company has continued to operate since then as a going concern with the support of the bank and its major creditors.

The 2010/11 accounts are not yet available but management accounts for the year show a profit of just over £2,300.

Table 4.1 also demonstrates that the company has steadily increased its self sufficiency from 50.5% of self generated income in the first year of operation to 81.8% by 2009/10, despite a reduced income from grants in the final year.

4.2 Grant income

There are currently three main sources of grant income (see Table 4.2 below) – Belfast City Council, Arts Council for Northern Ireland and the Department for Social Development (DSD). Initial funding for the establishment of the Black Box came from the Millennium Commission and amounted to £195,000

Table 4.2: Sources of Grant Income, 2006/07 to 2009/10

	2006/07	2007/08	2008/09	2009/10	% of total
Belfast City Council	10,000	15,700	25,300	25,000	38.5%
DCAL	50,000	0	0	0	
Arts Council NI	0	12,125	37,125	25,000	38.5%
Laganside	20,000	0	0	0	
DSD	0	60,275	19,120	15,000	23.1%
Total grants	80,000	88,100	81,545	65,000	100.0%

Source: Annual Accounts

We understand that total operational grant funding for the Black Box in the current year (2011/12) amounts to £61,000 and comes from the same three sources:

- **Belfast City Council** funding is provided under development funding from the Cultural Tourism department and is awarded annually. The Black Box was awarded **£25,000** for the current year. In future the Black Box would envisage applying for multi-annual funding;

- **Arts Council** funding is also awarded on annual basis on a one-off basis and is worth **£25,000** in the current year. The Arts Council has indicated that from next year, if the Black Box wishes to continue to receive funding, it will have to apply to one of the Council's regular grant programmes – the Annual Support for Organisations Programme (ASOP) or Project Funding;
- **DSD** funding is provided under the Laganside Events Programme and is worth **£11,000** in the current year.

4.3 Trading income

The Black Box has been particularly successful in growing its trading income over the four years of its existence, as illustrated in Table 4.3 below. Net trading income, after purchases and expenses, has increased from just over £80,000 in 2006/07 to almost £300,000 in 2009/10, an overall increase of 260%. There are three sources of this income – the bar, the café and hire of the venue. The bar contributes 44.1% of income, while the café and room hire contribute around 28% each. It is important to acknowledge that this excludes the costs of staff and other operating costs of the venue.

Table 4.3: Contribution from trading activities, 2006/07 to 2009/10

	2006/07	2007/08	2008/09	2009/10	% of total
Bar	70,540	95,499	113,329	129,227	44.1%
Café	4,121	20,268	48,645	82,319	28.1%
Room hire	7,029	37,852	75,168	81,684	27.9%
Total	81,690	153,619	237,142	293,230	100.0%

Source: Annual Accounts

The management accounts show that gross turnover from these activities fell from £444,424 in 2009/10 to £390,067 in 2010/11, or 12.2%) and that in the first 5 months of 2011/12 gross turnover was 4.2% below the level for the same period in the previous year. These falls in activity reflect the impact of the current economic recession.

4.4 Operating expenditure

Operating costs have also risen during the last four years, just over doubling to almost £385,000 by 2009/10. As Table 4.4 below shows, the largest increase has been in expenses associated with 'artistes & travel' which relates to the costs of productions presented by the Black Box itself rather than by independent promoters. The total expenditure on this item increased to just over £35,000 in 2009/10, although this represented a significant reduction on the previous year.

Table 4.4: Operating expenditure for the Black Box, 2006/07 to 2009/10

	2006/07	2007/08	2008/09	2009/10	% change
Wages, NI & training	54,144	95,566	155,547	180,264	233%
Licensing costs	8,682	1,699	2,575	1,824	-79%
Advertising	6,403	5,388	15,428	9,795	53%
Sound, lighting & equipment	2,043	5,024	12,990	12,168	496%
Performing rights	2,338	2,644	3,671	4,092	75%
Artistes & travel	615	24,444	52,704	35,550	5680%
Rent	52,498	69,996	69,996	69,996	33%
Repairs & cleaning	10,863	10,808	12,200	11,311	4%
Heat, light & power	8,060	3,544	13,336	11,387	41%
Insurances	5,310	5,366	5,092	4,520	-15%
Telephone & internet	1,115	1,270	2,708	1,652	48%
Stationery and postage	575	1,088	3,308	965	68%
Bank and other charges	964	2,268	2,852	6,567	581%
Accountancy & payroll	2,225	5,721	3,417	2,675	20%
Miscellaneous	1,462	1,277	1,367	214	-85%
Depreciation	26,481	26,581	30,745	30,619	16%
Total expenditure	183,778	262,684	387,936	383,599	109%
Amortisation of capital grants	-25,189	-25,189	-26,965	-26,965	
Total expenditure as per accounts	158,589	237,495	360,971	356,634	

Source: Annual Accounts

Other items that have increased significantly over the four years include 'sound, lighting & equipment' (up 496%), 'wages & national insurance' (up 233%) and 'bank & other charges' (up 581%). The increase in bank charges largely reflects the overdraft facility following the large deficit incurred in 2008/09.

In the current year (2011/12), management accounts show that operating costs are running at 12% below the level for the same period in the previous year, reflecting the lower level of activity at the venue referred to earlier.

The major items of expenditure at the Black Box are 'wages & NI' and 'rent' which together account for almost two thirds of total expenditure (see Table 4.5 below). The next largest item of expenditure is 'artistes & travel' which amounted to £35,550, or almost 10% of total spend in 2009/10.

Table 4.5: Operating expenditure, 2009/10

	2009/10	% of total
Wages, NI & training	180,264	47.0%
Licensing costs	1,824	0.5%
Advertising	9,795	2.6%
Sound, lighting & equipment	12,168	3.2%
Performing rights	4,092	1.1%
Artistes & travel	35,550	9.3%
Rent	69,996	18.2%
Repairs & cleaning	11,311	2.9%
Heat, light & power	11,387	3.0%
Insurances	4,520	1.2%
Telephone & internet	1,652	0.4%
Stationery and postage	965	0.3%
Bank and other charges	6,567	1.7%
Accountancy & payroll	2,675	0.7%
Miscellaneous	214	0.1%
Depreciation	30,619	8.0%
Total expenditure	383,599	100.0%

Source: Annual Accounts

The wages bill covers the employment of two full time staff – a Manager and Assistant Manager – and various part time or casual staff. The list of staff and their rates of pay are shown in Table 4.6 below.

Table 4.6: Black Box staffing and rates of pay, October 2011

Position	Wage
Manager	£22,061/yr
Assistant Manager	£9.05/hr
Book Keeper	£8.50/hr
Duty Manager	£8/hr
Admin Assistant	£8/hr
Green Room Supervisor	£7/hr
Bar Staff	£6.08/hr

Source: *The Black Box*

Total staffing costs in the first 6 months of the current year amounted to £63,241, compared with £72,234 in the same period last year, a reduction of 12.4%.

The other major item of expenditure for the Black Box is rent. The premises currently occupied by the Black Box are held on a 10 year lease which will expire in 2016 with an option to continue for another 5 years. The annual rental cost is £70,000.

We have not had the opportunity to examine the operating costs of the organisation in any detail to see if there are any opportunities to become even more efficient. However we consider that going forward the Board might wish to undertake a closer examination of its costs and how these are controlled on an ongoing basis.

4.5 Conclusion

The Black Box has done well to grow its turnover and income over the four years of its existence, although the current economic recession has seen this growth stall. This has been achieved with a reduced level of grant assistance from the public sector and the company had achieved a position of over 80% self generated income by 2009/10.

However, the company had not made profits in the first four years of its existence and an exceptional loss in 2008/09 has left the company with a large bank overdraft and operating as a going concern. Whatever the way forward for the organisation, the bank overdraft created by this loss needs to be addressed as it constrains the future development of the company.

The company faces a number of financial challenges looking forward including the continuing economic recession which is impacting on the business. In these circumstances it will be important for the company to strengthen its financial management and reporting systems as it seeks to maximise revenues and control its costs.

5 Governance

5.1 Organisational structure

The Black Box venue operates under a formal governance structure, comprising a Management Committee of board members including a Chairperson, Company Secretary, Director and two board members, each of which have a wealth of experience within the arts and culture sector. The details of each Management Committee member are provided below:

Chairperson:

Colette Norwood

British Council Northern Ireland, Arts Manager

Company Secretary:

Sean Kelly

Cathedral Quarter Arts Festival & Out to Lunch Festival, Director

Director:

Declan Hill

Forum for Alternative Belfast, Director

Board Member:

Stephen Hackett

Belfast Film Festival, Programmer

Board Member:

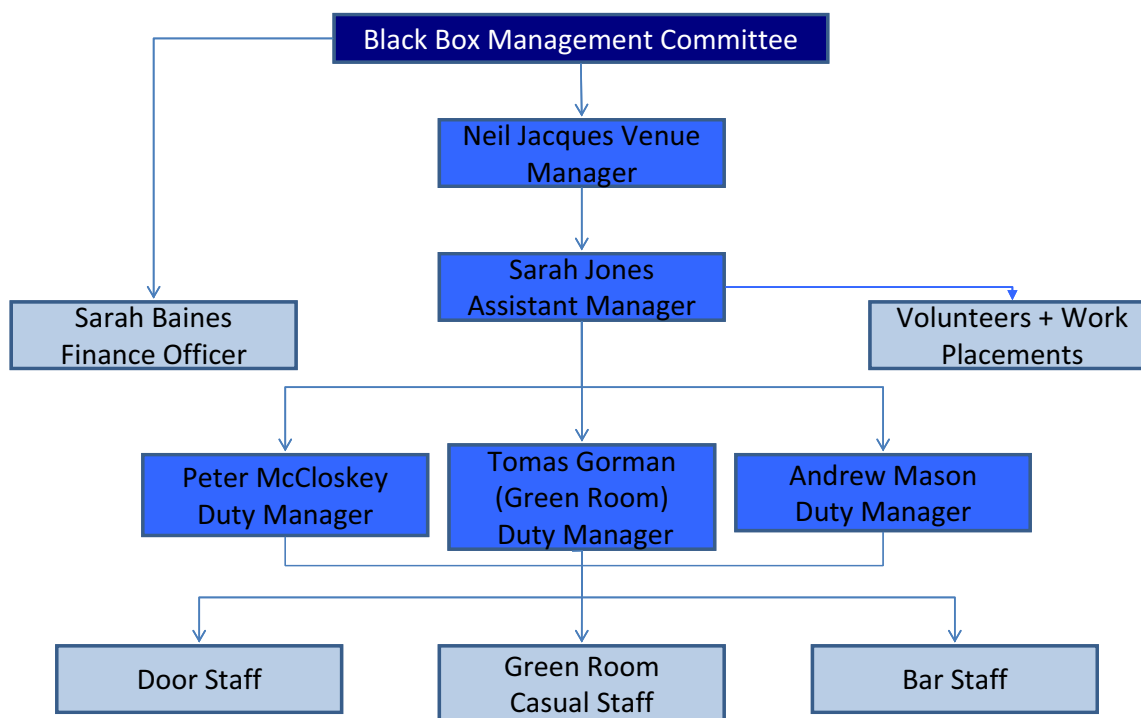
David Hyndman

NVTV (Northern Visions), Director

The Company Secretary is responsible for arranging board meetings which are attended by the rest of the Management Committee on a regular basis. The minutes of each are recorded and then summarised at the beginning of subsequent meetings with the aim of resolving any issues outstanding from previous meetings. The purpose of the board meetings is to review overall performance and make decisions regarding the operation of the venue.

The venue is run day-to-day by the Venue Manager and the Assistant Manager with additional support provided by three Duty Managers and a mix of bar staff, door staff, volunteers and work placements. The company accounts are managed by an appointed finance officer. The organisational structure of the Black Box is summarised in Figure 5.1 below.

Figure 5.1: Black Box organisational structure



The Management Committee recognise the need to review its board members to ensure that the venue is operating under a diverse profile of skills and expertise to make informed decisions for the organisation and to guide it in the right direction going forward.

The Committee have recently concluded that the Black Box would benefit from having board members with a background in finance and experience of helping organisations move towards greater sustainability. They have identified two appropriate candidates who fit with these criteria and have invited them accordingly to join as board members. New board members will be appointed in November/December 2011.

The proposed members, should they accept, will play a significant role in addressing the concerns highlighted by the venue's key stakeholders, regarding the current level of funding provided to the Black Box, and its future funding and sustainability.

In view of the great support that the Black Box enjoys from its audiences, the Board may also wish to consider how it might make greater use of volunteers in running and assisting in the operation of the venue. We appreciate the challenges of using volunteers and mixing volunteers and paid staff but would suggest that it might be considered as part of the way forward.

5.2 Case studies

In order to gain a deeper understanding of the funding, organisational and operational structure of the Black Box and the challenges it faces, we felt it would be beneficial to consult with other venues of a similar nature. We also wished to gain a perspective of 'best practice' in operating an arts and culture performance space.

We identified The Bongo Club in Edinburgh, The Arches in Glasgow and the Norwich Arts Centre as suitable comparators given there are no venues similar to the Black Box in Northern Ireland. However we were only able to secure an interview with one of these venues - The Bongo Club, despite our endeavours to engage with the other two venues within the tight timescale of this study

5.2.1 The Bongo Club, Edinburgh

The Bongo Club has been operating as an arts and culture performance space since 1996, running as a meeting and rehearsal space during the day and transforming into a multi-functional, multi-media venue for live music, theatre and clubs at night.

It moved from 'disintegrating' premises in 2003 to a building owned by Edinburgh University which was previously a student union. The venue specialises in 'art and music of the underground', supporting marginalised artists, both local and international, mixing live music, film, theatre and DJs.

The Bongo Club is not publicly or privately funded, although occasionally it would apply for funding for particular artistic projects. The venue is the trading arm of an arts and education charity. It is a commercial outlet that funnels money back into the central charity.

"We are what Oxfam shops are to Oxfam" Venue Manager, The Bongo Club

Marketing of The Bongo Club is largely via hand flyers, posters, online marketing campaigns and word of mouth. It does not do a lot of high profile advertising but has a presence on both Twitter and Facebook.

The venue is similar to the Black Box in size, although it has slightly greater capacity and is spread over two floors. Generally the events The Bongo Club hosts are not fully seated due to their nature. The entire capacity is 500 over both floors, equating to 100 upstairs and 400 downstairs when standing and 50 upstairs and 200 downstairs when seated.

Unlike the Black Box, The Bongo Club is fully licensed to 3am. Previously in The Bongo Club's former premises they operated using occasional licences, however the full entertainment licence they have currently works well in generating income for the venue. Drink can be served with live entertainment, but that can be a DJ.

"Effectively we run as a live music nightclub venue with some artistic programming that brings us closer to the Black Box in terms of programming, theatre, dance, film launches, etc. We have lots of things you wouldn't find in other nightclub venues, but the nightclub venue side of it is what funds us really, through bar sales" Venue Manager, The Bongo Club

The Bongo Club opened a café when it moved to its new premises in 2003, however have phased it out since then, apart from during the major festival held in Edinburgh, it is a venue within, over the month of August each year.

According to The Bongo Club's venue manager, there was a clash of space between running a night club to 3am and running a space to eat. It was possible, but the cleaning, turnover and maintenance of the space did not sit with running the night club and proved to be a financial drain. However, opening it during the Edinburgh Festival works as ***"we have stuff drawing people down during the day, to see shows. We are central but there is not a huge amount***

of passing trade, people will come down if there is something to see, otherwise there is not enough passing trade to run the restaurant”.

The Bongo Club rent their building from the Edinburgh University, which is provided on reasonable terms, for approximately £50,000 per annum, whereas the Black Box rent their premises from a private landlord for £70,000 each year. The Bongo Club's building was previously a student union, part of a smaller college that was bought over by the University.

“People know it is a venue, it works well because we have some students surrounding us, so this is inevitably part of the custom” Venue Manager, The Bongo Club

Similar to the Black Box, The Bongo Club attract a “quirky” and “bohemian” type audience depending on what is put on. Generally, the performances are less mainstream, ranging from very small local acts to very large international acts.

“You’ll see your mate’s daughter one night and your others mate’s dad another night, our programming goes from jazz to heavy metal across the board” Venue Manager, The Bongo Club

The Bongo Club hire the venue to artists for them to put on events themselves; occasionally they will be involved, either through co-promotion or self promotion of a specific event. However largely, they rent the space and choose the most appropriate events. An early evening slot for live music, 7pm – 10pm would be charged at £200 to £250 depending on the day of the week. A late night slot is charged at the same rate, with the exception of weekends, which is charged at £600 – £650, Friday and Saturday nights up to 3am. The venue also charges £5 per hour for rehearsal space during the day. Furthermore, if the space is booked it is charged at £20 per hour, depending on what the artists hiring require i.e. no staff or technical requirements will lower the cost.

“A film launch is having the 7-10pm slot for £75 due to an artistic program we are on and their staff requirements are low. Basically we hope to cover costs via venue hire and then seek to make money from the bar” Venue Manager, The Bongo Club

In total, The Bongo Club has approximately 25 employees which increases to 50 during the Festival period in August. There are 3 core staff that are employed full time, namely the venue manager, assistant manager and night time operations manager. There are also, 10 to 12 staff who are employed on an hourly basis, such as security personnel, bar staff, technical staff and PR staff.

The Bongo Club has competition from other commercial outlets with similar capacities, mainly other night club/live music venues.

“Because of our success over the years some of them try to appear like an arts and culture type venue. On the arts and culture side we have a few competitors that get set up usually similarly to the way we started off as a sort of collective of people and being perhaps a little more ad hoc and slowly coalescing and coming together. They are typically smaller than us and don’t always have longevity whereas we have managed to strike a balance between the two and secure a long term lease. It has been a hard space to hold on to as it is a small city with a large amount of competition” Venue Manager, The Bongo Club

Where the initial set-up costs for the Black Box were provided by the Laganside Corporation, Millennium Commission, DCAL and BCC, The Bongo Club received no set-up costs for the

venue. It cost approximately £30,000, which the venue has been working its way through for the past 8 years. This was done through juggling creditors.

“It wasn’t a relaxing process but we have sort of seen ourselves clear in the past couple of years. We are now more sustainable” Venue Manager, The Bongo Club

When asked ‘what actions did you put in place to become more sustainable?’ the venue manager responded:

“My background is technical production, light and sound etc. I had to manage the whole product over all; I had to pull in a lot of advice. An example of some funding we got was peer advice through a local enterprise trust, basically advice from people in the industry (licensed trade) like how bars work, how to run things and how to keep on top of the financial dealings. I worked quite heavily on implementing the advice gained for a good few years and slowly it start to make a difference” Venue Manager, The Bongo Club

5.2.2 Real life lessons

While the Black Box and The Bongo Club appear to share numerous similarities such as the nature and size of the venues, how they are marketed, the audiences they attract, the types of events they host, and the number of full-time staff they employ, they have been successful as arts and culture performances space in their own right for different reasons.

The evidence gathered from the consultation with The Bongo Club has given an insight to the success of the venue, providing some examples of good practice that the Black Box might consider applying to its future operation. Taking into account the Black Box’s aspiration to become 100% self-generating it is useful to consider the actions The Bongo Club put in place to overcome its challenges and become more sustainable.

Prior to moving to new premises in 2003, The Bongo Club operated using an ‘occasional licence’ which catered for the sale of alcohol at the venue for a period of not more than fourteen consecutive days as it did not have a premises licence.

The Black Box operates in a similar nature to how The Bongo Club did previously, obtaining an occasional licence from the John Hewitt pub for special events throughout the year. The remainder of the year, it is operating under a theatre licence, which restricts the serving of alcohol to times only when performances are on and between 5pm and 11pm.

Since 2003, The Bongo Club has been licensed to sell alcohol to 3am which has been cited as the main driver in generating income for the venue, through its bar sales.

The restriction on serving alcohol has been pinpointed as the Black Box’s only weakness throughout our research and although applying for a full licence may raise concerns from key stakeholders and local publicans, in terms of the venue becoming more commercial and competitive, bar sales have funded The Bongo Club and helped it move towards becoming self-sustaining. It is possible that the Black Box would experience similar success if it was to obtain a full licence.

The Bongo Club closed its café as it was not financially viable and was a drain on resources. The café now only opens during the major festival period in Edinburgh in August, when footfall in the area is high.

The Black Box also closed its café for the same reasons as The Bongo Club, which was as a result of a lack in passing trade and local competition. Although, the closure of the café only applied to daytime trading hours, still operating each week Thursday to Saturday 5pm to 11pm. It is only open during the day over the twenty-five days of January for the Out to Lunch Festival, a similar basis to that of The Bongo Club during its busy festival time.

The decision by both venues to close their cafes and operate them only on temporary or periodical terms seems to have worked well for both parties. Some may argue that the Black Box's decision to close the café during the day is a wasted opportunity in generating additional income, however given the experience of The Bongo Club as a similar arts and culture venue and the lack of footfall in the Cathedral Quarter during the day, it makes sense for the Black Box to only open the café on a temporary basis or when there are particular performances or festivals on to draw people in.

The Bongo Club rent their building from Edinburgh University, which was previously the university's student union. The terms of the lease were provided at a reasonable rate of £50,000 per annum to The Bongo Club on the basis of its charitable aims as the trading arm of an arts and education charity. Whereas, the Black Box currently pays a rate of £70,000 per annum to a private landlord, which they recently tried to negotiate downwards, however no agreement to lower the rent could be reached.

Plans for the University of Ulster's Jordanstown campus to move to a new landmark building in the Cathedral Quarter are expected to make ***"a major contribution to the economic and cultural regeneration of the city's north side, including the Cathedral Quarter, injecting vitality and energy into this important part of the city. This plan will help transform the Cathedral Quarter and surrounding areas into a dynamic cultural, creative and educational destination"*** Professor Richard Barnett, Vice Chancellor, University of Ulster

As a popular venue for 'students and singles' and its involvement in the development of the city's north side as a place to socialise and enjoy the arts and culture, the Black Box could explore whether the university would be interested in supporting the venue's operation going forward, , connecting education to arts, culture and creativity.

The Bongo Club have a peak and off-peak pricing structure in place, whereby they charge higher prices for evenings and weekends. Although the rates it charges would not be applicable to the Black Box, as it is a slightly larger venue with a full licence, the Black Box Management Committee could review the current pricing structure and adopt The Bongo Club's concept of charging slightly higher prices for renting spaces. At weekends an uplift in charges could be introduced without diminishing one of its key strengths as being 'reasonable' and 'affordable'.

The Bongo Club sought funding for training and advice from industry experts. Its venue manager then applied the knowledge he had gained to the operation of the venue which has helped significantly in terms of becoming more sustainable.

Having the right skills set is the key to the success of any business. The Black Box has already taken steps to gain advice regarding finance and moving towards sustainability by inviting two new members with experience in both fields to the Management Committee of the venue. In addition the Board might wish to consider providing training for staff in financial management, ultimately moving towards developing a sustainable business plan.

Consulting with The Bongo Club regarding its funding, organisational structure and operation has deepened our understanding of the challenges that other arts and culture performance spaces,

similar to the Black Box, have faced and how they have overcome them. The evidence gathered has provided real life lessons for the Black Box to consider applying to its operations. It has also helped to inform our method of identifying viable options for the Black Box's continued existence in Section 6 – Identification of Options.

6 Options for the way forward

This section considers the strategic context and the need identified in the previous sections and provides an overview of the objectives, opportunities and constraints of the continued operation of the Black Box. It then examines the options for the way forward.

6.1 Key objectives

In light of the strategic context and the need identified, the primary objectives for the future operation of the Black Box are:

- To deliver increased access to and participation in artistic and cultural activities;
- To sustain and develop the current activities of the venue;
- To contribute and complement existing/planned infrastructure and resources;
- To move towards greater sustainability; and
- To help achieve the strategic objectives of the ACNI, BCC and DSD.

These achievements should result in a number of social, economic and cultural benefits for Belfast and its communities, such as:

- Increased complementary expenditure in the local area from visitors and tourists;
- Increased social cohesion through the provision of a neutral space;
- Less dependency on public funds going forward; and
- Increased recognition and popularity of the Cathedral Quarter area as the arts and cultural hub of the city.

6.2 Opportunities

In our view there are specific opportunities for the Black Box to consider going forward.

- The continuing growth of Cathedral Quarter as a cultural quarter of the city and the potential implementation of the Cathedral Quarter 5 Year Vision & Development Plan provide an important context for the Black Box;
- Having established itself over the last 5 years as a key element of the Cathedral Quarter scene with strong support and growing audiences, there is an opportunity to consider how to consolidate and enhance its position over the next 5 years;
- The events in Northern Ireland associated with 2012 and the associated projected growth in tourism visitors to Belfast next year and beyond represent an important opportunity for the Black Box;
- In our view, the opening of the MAC represents an opportunity rather than a threat, not just for the Black Box but for the whole Cathedral Quarter with increased numbers of visitors and footfall in the area; and

- The growing reputation of Belfast as a music city suggests that there will be increased demand for music venues across the city.

6.3 Constraints

The constraints facing the future operation of the Black Box include issues of public funding, temporary set-up, lease and usage of the building, venue and location.

6.3.1 Public funds

The sources of public funding that the Black Box has received to date are unlikely to be so readily available as before. During an era of public austerity, the Black Box must apply for funding through appropriate funding channels provided by the ACNI, BCC and DSD, as any other arts and culture organisation.

Public spending cuts have significantly curtailed organisational and departmental budgets, thus increasing the competition between artistic and cultural groups for limited pots of money as flagship projects are prioritised. Capital budgets have been particularly restricted and therefore, it is unlikely the building of the Black Box would be purchased by any public sector organisation. In addition, the level of funding previously provided by each key stakeholder may not be matched in the future provision of funds.

Furthermore, there is significant urgency on securing public funds for the continued operation of the venue as its current funding is based on it operating to the end of March 2012.

6.3.2 Private/bank funding

With the Black Box not making any profits during the first four years of its existence and a significant loss in 2008/09 of approximately £45,500, creating a substantial bank overdraft, it constrains its development and potential for investment.

For these reasons, it is unlikely that the Black Box would succeed in securing private sector investment or any debt finance from the bank until its overdraft is cleared or seen to being reduced.

6.3.3 Temporary set-up

The Black Box was set up as a temporary venue to address the critical lack of performance space in the Cathedral Quarter in April 2006, with the aim of building audiences in the area until the arrival of the planned MAC was operational. While it has created its own unique presence and has become accepted as a key element of the Cathedral Quarter, there is still a perception that it is threatened by the opening of the MAC. In our view this is not a real threat, as the MAC is a different scale and type of venue.

6.3.4 Lease and nature of building

The Black Box Management Committee met with the landlord of the building to review and negotiate the terms of lease of the building, currently equating to £70,000 per annum. Unfortunately there was no agreement reached in terms of lowering the cost of the rent.

Furthermore, the only permitted use of the building is a mixed performance venue for live music, comedy and other events. This would therefore impact upon any long term investment decision from the private sector.

6.3.5 Venue and location

The Black Box has built up its reputation over the years as a popular arts and culture performance space at the heart of the Cathedral Quarter. Its identity has been defined by the characteristics of the venue and its location.

There are no suitable venues that capture the essence of the 'black box' feature and no alternative locations within the Cathedral Quarter or other parts of Belfast. There is no option to move the Black Box.

6.4 Identification of options

We considered a long list of options when considering the future operation of the Black Box. These options were then subjected to a short-listing process of which the majority fell under broader descriptions. These options are identified below in context of the key objectives of the venue's continued existence.

Option 1: Status Quo

Option 2: Closure of the Black Box

Option 3: Becoming an independent/commercial venue

Option 4: Broadening the venue's funding base

Each of the options is described and an explanation is provided as to why a particular option has/has not been taken forward for further consideration in the 'Option advantages and disadvantages' section below.

6.5 Option advantages and disadvantages

6.5.1 Option 1 – Status Quo

The Black Box has operated to date with annual funding provided by the ACNI, BCC and DSD up to an approximate value of £60,000 out of a total annual turnover of almost £400,000.

This option would involve the Black Box operating within its current state of affairs or existing arrangement, having already received the funding from the ACNI, BCC and DSD for financial year 2011/12. It is assumed that the Black Box will apply for new funding provided by these sources for financial year 2012/13. However there is no guarantee that renewed funding will be available on the same basis and we therefore consider that this option is not sustainable.

Although this option does not meet the objectives of the Black Box going forward and could eventually lead to its closure, it has been included as a baseline for comparison with other options in line with good practice.

6.5.2 Option 2 – Closure of the Black Box

This option would involve the Black Box continuing to operate based on the funding it has received up to the end of financial year 2011/1 and applying for future funding for financial year 2012/13 and beyond where relevant. It assumes the venue would be unsuccessful in acquiring the funds applied for, ceasing to exist beyond March 2012.

The advantages and disadvantages of this option are presented in Table 6.1 below.

Table 6.1: Advantages and disadvantages of Option 2

Advantages	Disadvantages
Public sector would no longer have to provide funding for the Black Box and could focus on the needs of other arts organisations and flagship projects	Black Box stakeholders would potentially have to pay back the venue's outstanding debts
	Staff employed by the Black Box would become unemployed
	Reduction in charitable contributions
	Potentially reduce footfall that would otherwise have been in the Cathedral Quarter area
	Potentially impact upon tourist visits, nights and spend in the area
	Potentially reduce complementary spending in local businesses, reducing turnover
	Loss of a flexible and affordable performance space
	No home for year on year Festivals and events currently hosted/facilitated by the Black Box
	Loss of a unique product and niche audience in the arts and culture sector
	Less support for indigenous artists
	Less suitable spaces for events used by Promoters

Although this option would not take up further funding from the public sector, its closure would potentially have significant implications for the local area and the overall arts and culture sector in Belfast, in terms of reduced visits and complementary spending in the Cathedral Quarter and the loss of a suitable space for regular events and Festivals facilitated year on year by the venue.

There are many disadvantages associated with this option compared to advantages, of which we have only been able to identify one, no further public investment in the venue.

The closure of the Black Box is a reality if it is not successful in acquiring funding to continue its operation, it cannot survive without support. This is not an option the Black Box wishes to consider; rather it is what will happen without funding, not through choice.

Given the success of the Black Box since its inception and the benefits attributed to its existence, we do not consider closing the venue as a viable option.

6.5.3 Option 3 – Becoming an independent/commercial venue

This option would involve the Black Box becoming independent of any public funding and operating as a purely commercial venue. It would assume either a continuation of the current lease agreement of the building, or a full or joint purchase with a partner of the Black Box building as well as the purchase of a premises licence.

The advantages and disadvantages of this option are presented in Table 6.2 below.

Table 6.2: Advantages and disadvantages of Option 3

Advantages	Disadvantages
Potentially own or part own an asset, paying interest only on a loan, reducing outlays	Additional costs/responsibilities of owning a commercial premises i.e. business rates, maintenance
Secure the venue's location and potentially its operation going forward	Additional pressure in meeting business targets/key performance indicators - sales, revenue, etc
Extend serving and opening times	Less charitable support if exclusively commercial
Generate more income through additional bar sales and higher prices of renting spaces to performers and events	Less support for indigenous artists/performances becoming more mainstream if purely commercial
	Become less affordable
	Become less flexible in terms of booking style, events planned well in advance

Advantages cont...	Disadvantages cont...
	Potentially objections from local businesses in becoming competition
	Lose financial backing and support of the public sector

Although this option would meet the majority of key objectives to the continued operation of the Black Box, unless a potential private partner is identified, it is unlikely that the venue would be capable of becoming an independent/commercial venue.

Its operation with an ongoing net deficit and reliance on public sector funding to date would also limit the opportunity to attract a private investor or obtain a loan from the bank to run as a stand alone business.

In addition, operating as an independent/commercial venue would conflict with the Black Box's mission statement as a not-for-profit arts venue. Applying for a premises licence, extending the hours it could serve alcohol to customers would also raise objections from the local business community.

Therefore, we do not consider this to be a viable option for the continued existence of the Black Box and will not be carrying it forward for consideration.

6.5.4 Option 4 – Broaden support from public sector and other sources

This option would involve the Black Box continuing to operate with support through public sector and/or other funding. It assumes that the venue will apply for funding from a wider range of sources other than the providers to date i.e. in addition to its applications for funding to the ACNI, BCC and DSD, to broaden its funding base.

The advantages and disadvantages of this option are presented in Table 6.3 below.

Table 6.2: Advantages and disadvantages of Option 4

Advantages	Disadvantages
Attract new monies and investment from relevant organisations such as the Paul Hamlyn Foundation, Heritage Lottery Fund, NITB	Additional time and resource required to prepare applications on top of existing applications to traditional providers
Increase the probability of attaining funding	May not meet some of previous funders' new criteria and the criteria of potential funders
Become less dependent on traditional sources of funding	Competition for funding is high and available monies are limited

Advantages cont...	Disadvantages cont...
Help to increase the job security of existing venue staff and equipment suppliers	Potential delay in delivery of funding
Increase opportunities for staff development, as specific grants for training can be obtained	
Increase opportunities to move towards becoming more sustainable, generating additional income	
Additional resource to programme more performances and events	

This option agrees with the key objectives of the Black Box going forward as it involves funding/investment in its operation going forward. The advantages of this option outweigh the disadvantages and help to mitigate against the risk of not receiving funding.

In our view, applying to additional sources of public sector funding and other relevant sources is the preferred option for the continued existence of the Black Box.

6.6 Preferred option and assessment of risk

The preferred option to 'continue with public sector and other support' will have a number of associated risks and uncertainties that potentially will affect successful implementation. These have been considered against the following headings:

- Lack of public funding
- Restricted lending
- Criteria of other funding sources
- Competition for funding
- Lack of business case

6.6.1 Lack of public funding

The ACNI, BCC and DSD budgets have been cut significantly in light of the planned cuts in public spending over the next four years and may not be able to provide the same level of funding as provided to the Black Box in previous years.

This is a major risk to the future operation of the venue as it requires this level of funding going forward.

6.6.2 Restricted lending

Banks' lending practices and provision of credit have been reinvented and restored to strict guidelines as a result of the credit crunch. Easy credit is no longer available and debt has become expensive as banks try to recoup losses in their balance sheets.

With the Black Box's current overdraft, carrying the venue's net deficit as a going concern, it is unlikely the bank would continue to support the Black Box going forward, without public sector or other financial backing, despite it being 82% self-generating.

6.6.3 Other sources of funding

Identifying other sources of funding, as well as the type of funding the Black Box will apply for will be key to its future operation as it will have to meet the funders' criteria.

One risk is that the Black Box will not meet the criteria of other sources of funding and will be relying solely on existing applications. The second risk is that the potential sources will only agree to fund the venue on the basis that existing or other funders comply in matching funds. The final risk is that available funding will not be aligned to other agreed funds, incurring a shortfall in funds for the venue to remain open for business.

It is also, worth pointing out that the Black Box may have already missed opportunities to submit applications to other sources of funding and will have to wait until they are open for application the following year, or on whatever time period they are offered.

6.6.4 Competition for funding

Competition for funding in the current period of public austerity will increase as organisations apply for limited pots of money and government departments try to do more with less, prioritising existing or planned flagship projects.

The risk to the Black Box will be it not being viewed as a priority case and the basis on which it was set-up as a temporary venue.

6.6.5 Lack of a business case

The lack of a robust business case for the Black Box's continued operation will place the venue at a disadvantage when applying to funders.

Given the impetus to gain funding for financial year 2012/13 for the venue's continued operation, the risk is that applications for potential funds will be required sooner rather than later and the Black Box will not have a suitable business case prepared in time to append to its applications

7 Conclusions and actions

This section concludes the options for the way forward and provides actions for the Black Box to take to make the preferred option happen.

This study has provided evidence on the feasibility of the Black Box as an arts and culture performance space going forward.

The evidence gathered and analysis provided has shown that there is a need and demand for the future operation of the venue, in terms of the meeting the strategic objectives set out by key stakeholders, attracting a growing audience, adding to the arts and culture offering, contribution to local business and creating its own identity and audience type.

It is our view that the Black Box brings a niche product to the arts and culture sector and offers performances and events that will not be in direct competition with the offering provided by existing or planned infrastructure, such as the MAC as a result of its unique nature.

The Black Box has operated on a minimum amount of public sector funding and has become 82% self-generating since opening in 2006. However, its ongoing net deficit needs to be addressed for it to continue to exist and move towards greater sustainability.

A number of steps will need to put in place to address these issues going forward and to make the preferred option to continue with public sector funding and attract other support viable.

The first step the Black Box will need to take is to prepare a robust business plan for its future operation. The evidence provided in this study will form the basis of the plan in setting the strategic context, assessing the need and demand for the venue, reviewing governance and identifying relative strengths, weaknesses, opportunities and threats.

We have identified specific actions for the Black Box to undertake to overcome the issues identified and in preparation of a business case in Table 7.1 below:

Table 7.1: Action plan and timeframe

Actions	Timeframe for implementation
Business plan setting out the venue's vision over the next 3 to 5 years, providing strategic plans in relation to its marketing and sales, staff, customers and operations going forward. It must also include a financial analysis, setting out goals to meet for the venue to move towards sustainability, in line with its aspiration to be 100% self-generating, and the level of support it will need to meet these targets.	Within the next 6 months
Introduce an in-house system to record the number of events by type, the audience they attract and the revenue they generate through ticket sales, rental of space and bar sales. This will enable the Black Box to monitor their performance and know which events benefit the business most. It will also build a baseline for projecting future audiences.	Within the next 3 months on an ongoing basis

Actions cont...	Timeframe for implementation cont...
Carry out market research of those attending events and performances at the venue to develop a deeper understanding of the customer base. This will identify any gaps in the characteristics of those who typically attend specific events and enable the Black Box to broaden their marketing strategy.	Within the next 3 months on an ongoing basis
Complete a skills audit of board members to ensure all the expertise required to run the Black Box effectively are in place and identify any gaps. The Board has already identified a need to strengthen its financial management and strategic planning.	Within the next 2-3 months and annually thereafter
Consider making greater use of volunteers to work in the Black Box to reduce the wage bill of the venue.	Within the next 6 months
Engage with the MAC and other arts providers in the Cathedral Quarter, including Oh Yeah! and the University on programming and pricing issues, if necessary facilitated by the Arts Council.	January 2012 onwards (aligned to the MAC's programming and pricing becoming publicly available)

It will take time to put these actions in to place and it will require additional funding, separate to the funds required for the operation of the venue, to become effective. We would recommend the Black Box to apply for 'transitional' funding to support the action plan outlined above. This funding would:

- Provide additional resource to record and monitor venue data and information;
- Provide training for existing staff in financial management;
- Provide the opportunity to employ a financial director/senior manager; and
- Enable the Black Box to seek advice and guidance on the preparation of a business plan.

We understand that the Black Box plans to apply for funding from the ACNI, BCC and DSD for financial year 2012/13. This funding is intended for continuing the operation of the venue. To mitigate against the risk of not receiving the required level of funding from these organisations, the Black Box have already investigated some of the other funds that may be available for them to apply for, one being the Paul Hamlyn Foundation. We have identified other potential streams, such as the Heritage Lottery Fund, and others, of which details are included in Annex A.

Annex A

Table A: Other potential streams of funding

Funding provider	What the funding can be used for	Eligibility	Applications due	When funding becomes effective	Funding available	Notes
Your Heritage - Heritage Lottery Fund	This fund supports projects that look after and enhance the UK's heritage, increase participation in heritage activities and improve access to and enjoyment of heritage.	Not for profit organisations	Rolling programme - no deadlines for applications	Decisions on applications are made within 10 weeks from receipt	£3,000 - £50,000	Projects should conserve and enhance the UK's diverse heritage or encourage communities to identify, look after and celebrate their heritage and ensure that everyone can learn about, have access to, and enjoy their heritage
John Moores Foundation - Grants for Northern Ireland	This scheme provides grants to registered Northern Ireland charities to help them grow and develop. It will support: start-up and running costs volunteer and programme costs education and training costs venue and travel costs one-off project costs equipment	Charity or not for profit organisations	Rolling programme - there are no deadlines for applications	-	Maximum amount is discretionary but aim to give small amounts to a large number of organisations	-
Community Relations Council - Community relations, Cultural diversity grant scheme	This funding is intended to help community/voluntary groups throughout Northern Ireland develop their capacity to engage in community relations work and to enhance the community relations potential of projects they undertake.	The scheme is aimed at locally based groups such as community development groups, cultural organisations, and other organisations and groups involved in community relations, reconciliation projects and cultural engagement .	-	8 - 12 weeks	Maximum amount: £10,000	There is no restriction on the number of applications any one group can make to the scheme. However, if a group has received funding in the past, it may need to demonstrate that new proposals will build upon earlier achievements.
Foyle Foundation	The foundation will support charities in the U.K. The dominant purpose of which is to benefit either the Arts or Learning.	Generally they make grants for specific projects/activities such as building projects. However they will consider applications for core funding, generally from small organisations.	Applications are accepted all year round	-	£10000 - £50000	Requires supporting evidence with application. Is not exclusive to Northern Ireland.
Esmée Faisbairn	Fund Charitable activities of organisations Consider work which others may find hard to fund, perhaps because it breaks new ground, appears too risky, requires core funding, or needs a more unusual form of financial help such as a loan. Also takes initiatives where new thinking is required or where we believe there are important unexplored opportunities. Commit £30 million annually towards a wide range of work.	Our primary interests are in the arts, education and learning, the environment and enabling disadvantaged people to participate fully in society.	Applications accepted all year round	-	Wide range of funds from this organisation	Have a Finance Fund for not-for-profit organisations such as the Black Box
Elephant Trust	Committed to helping artists and institutions that depart from the routine and signal new, distinct and imaginative sets of possibilities. Priority is given to artists and small organisations and galleries who should submit well argued, imaginative proposals for making or producing new work or exhibitions.	-	16th January 2012	-	Not generally exceeding £2000	Appear to have funded quite a lot of small organisations like the Black Box, for example galleries.

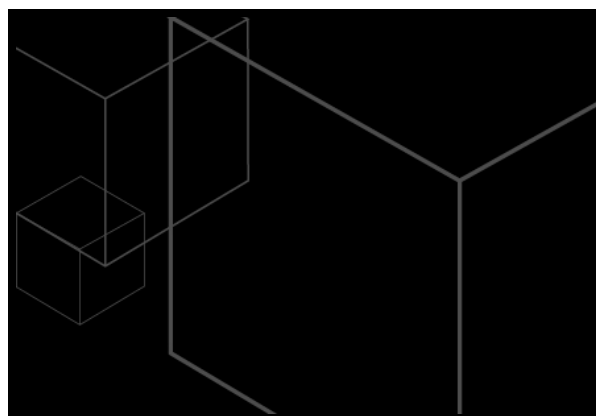
Annex B

Audiences NI Black Box Mosaic Analysis

Mosaic NI Analysis

Black Box

August
2008 to
October
2011



Mosaic Analysis Black Box, August 2008 to October 2011

Brief: To provide a demographic analysis of bookers for arts events at the Black Box Belfast in Belfast between August 2008 and October 2011, based on data for advance sales online.

Methodology: The Black Box downloaded the names and addresses of all the accounts within their Worldpay booking system that had booked tickets for at least one event between August 2008 and mid-October 2011. This dataset did not include any mailing list data, door sales or sales through other ticket sellers. The dataset was de-duped and then compared against Mosaic Northern Ireland for demographic profiling.

The impact of data collection: The dataset provided is representative of advance sales online only, and therefore potentially provides a partial picture of the audience.

- Tickets/events sold through other ticketing systems (e.g. Ticketmaster, Cathedral Quarter Arts Festival, Belfast Welcome Centre) are not represented within this dataset.
- Tickets sold on the door are not represented within this dataset.
- Events where no ticket was issued are not represented within this dataset.
- Use of facilities such as the café are not represented within this dataset.

Mosaic Northern Ireland:

The population of Northern Ireland are segmented into 9 Mosaic NI Groups, and 36 Mosaic NI Types, and each of the Types has a parent Group. The segmentation is constructed by considering a diverse range of characteristics (based half on Census 2001 data and half on ongoing primary research). Post codes are classified into a particular Mosaic NI Type dependent on the shared characteristics of the majority of households in that post code. Mosaic NI Types are also grouped together into wider segments sharing some (but not all) similar characteristics called Mosaic NI Groups.

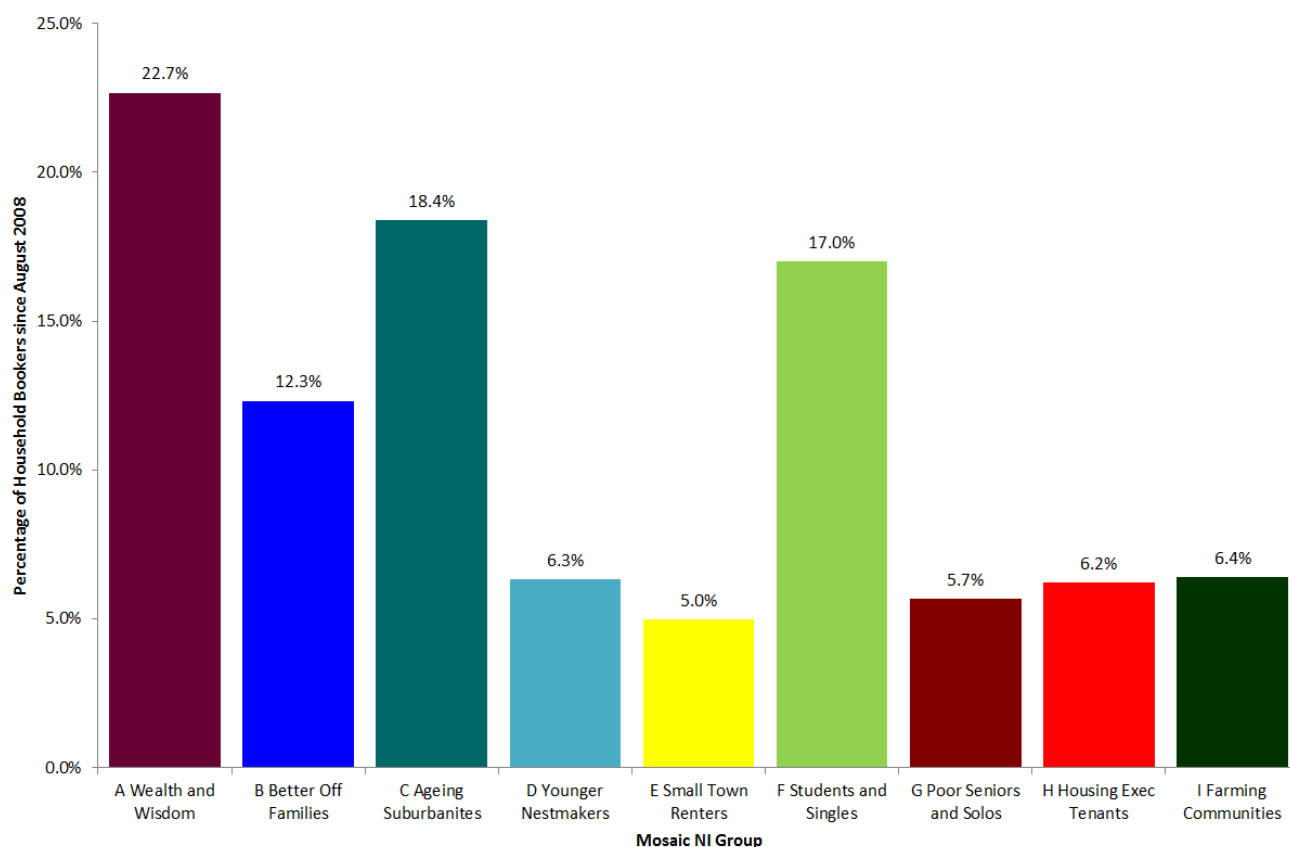
Mosaic NI Groups therefore provide a more general top level overview (where some detail is sacrificed), while Mosaic NI Types provide a more detailed analysis of demographic characteristics.

Interpreting Mosaic NI Group/Type characteristics:

No postcode in Northern Ireland is completely homogenous, and all contain some level of variation across each variable used to construct the segmentation, both between and within households. Therefore, when you are considering any of the characteristics discussed here - such as age range - this must be interpreted within the various age ranges which are above average/average for that group rather than as a single stereotypical age range for that group.

These results indicate what is above average or average for each Mosaic NI Type, based on index scores against the population as a whole. As such, some groups are more above average than others. This information has not been included here, but can be assessed by consulting the Mosaic NI E-Handbook (available at www.audiencesni.com/download/files/Mosaic_Northern_Ireland_E-handbook.pdf). This also provides numerous other variables which may support the analysis beyond those requested by the client.

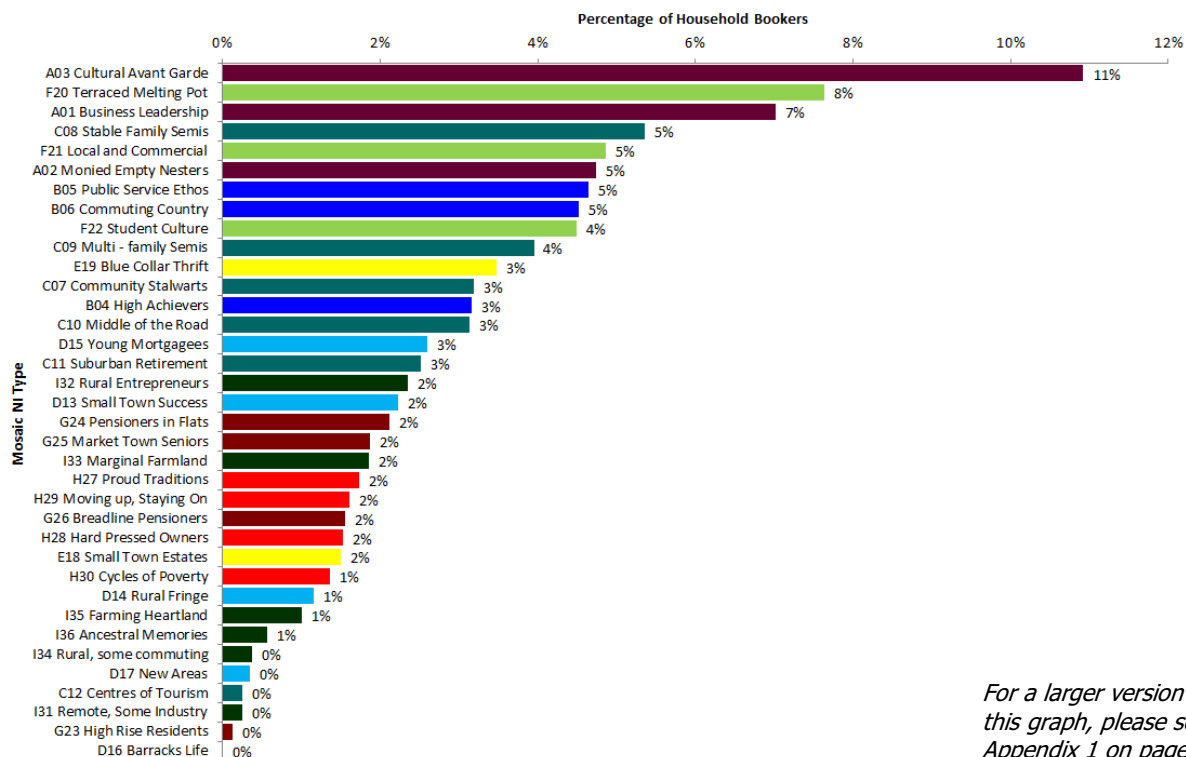
What sort of people booked at the Black Box in Belfast?



Mosaic NI Group	Number Of Household bookers since August 2008	% of household bookers since August 2008	Overall NI Households	NI Household Penetration
A Wealth and Wisdom	918	22.7%	50,222	1.8%
B Better Off Families	499	12.3%	64,586	0.8%
C Ageing Suburbanites	745	18.4%	120,127	0.6%
D Younger Nestmakers	256	6.3%	67,847	0.4%
E Small Town Renters	202	5.0%	79,421	0.3%
F Students and Singles	688	17.0%	42,453	1.6%
G Poor Seniors and Solos	230	5.7%	68,186	0.3%
H Housing Exec Tenants	252	6.2%	111,215	0.2%
I Farming Communities	259	6.4%	108,715	0.2%
Total	4,049	100%	712,772	0.6%

What sort of people booked at the Black Box in Belfast?

- At least 0.6% of the households in Northern Ireland have attended the Black Box between August 2008 and October 2011. This figure is representative solely of those who have booked tickets for events in advance online and should be treated as a minimum level, rather than an overall total.
- An analysis at Mosaic NI Group level (the 9 groups across Northern Ireland listed on the previous page) provides a general overview, by grouping the 36 Mosaic NI Types together into wider segments with some (but not all) similar characteristics.
- 70% of the households come from one of four Mosaic NI Groups – Wealth & Wisdom, Better Off Families, Ageing Suburbanites and Students & Singles. To help get a top level understanding of demographics, consult the short pen portraits of these four groups on Page 7
- Compared to audiences for Belfast arts venues generally, the Black Box Belfast is bringing in an above average level of Wealth & Wisdom (14% of bookers generally, 23% at the Black Box) and Students & Singles (7% of bookers generally, 17% of Students & Singles bookers).¹
- However, a Type level analysis provides more specific details on the demographics of each constituent segment of the audience demographics – but in turn presents a more complex picture to interpret. The 36 types below are alphabetically coded (A-H) and colour coded according to their parent Group, and their characteristics are broken down in the tables from Pages 7 to 12.
- For full portraits of these Groups and Types please see the Mosaic NI E-Handbook (available at [www.audiencesni.com/download/files/Mosaic Northern Ireland E-handbook.pdf](http://www.audiencesni.com/download/files/Mosaic%20Northern%20Ireland%20E-handbook.pdf))



For a larger version of this graph, please see Appendix 1 on page 13.

¹ Comparison based on an analysis of 12 Belfast based arts organisations connected to Audiences NI's Vital Statistics data analysis software across a 3 year period.

What sort of people booked at the Black Box in Belfast?

Mosaic NI Type	Number Of Household bookers since August 2008	% of household bookers since August 2008	Overall NI Households	NI Household Penetration
A03 Cultural Avant Garde	442	10.9%	15,971	2.8%
F20 Terraced Melting Pot	309	7.6%	10,370	3.0%
A01 Business Leadership	284	7.0%	15,424	1.8%
C08 Stable Family Semis	217	5.4%	26,453	0.8%
F21 Local and Commercial	197	4.9%	25,154	0.8%
A02 Monied Empty Nesters	192	4.7%	18,827	1.0%
B05 Public Service Ethos	188	4.6%	20,158	0.9%
B06 Commuting Country	183	4.5%	29,373	0.6%
F22 Student Culture	182	4.5%	6,929	2.6%
C09 Multi - family Semis	160	4.0%	17,177	0.9%
E19 Blue Collar Thrift	141	3.5%	42,562	0.3%
C07 Community Stalwarts	129	3.2%	22,632	0.6%
B04 High Achievers	128	3.2%	15,055	0.9%
C10 Middle of the Road	127	3.1%	30,317	0.4%
D15 Young Mortgagees	105	2.6%	25,331	0.4%
C11 Suburban Retirement	102	2.5%	19,584	0.5%
I32 Rural Entrepreneurs	95	2.3%	26,667	0.4%
D13 Small Town Success	90	2.2%	25,499	0.4%
G24 Pensioners in Flats	86	2.1%	13,954	0.6%
G25 Market Town Seniors	76	1.9%	29,325	0.3%
I33 Marginal Farmland	75	1.9%	31,508	0.2%
H27 Proud Traditions	70	1.7%	36,972	0.2%
H29 Moving up, Staying On	65	1.6%	25,617	0.3%
G26 Breadline Pensioners	63	1.6%	23,287	0.3%
H28 Hard Pressed Owners	62	1.5%	22,415	0.3%
E18 Small Town Estates	61	1.5%	36,859	0.2%
H30 Cycles of Poverty	55	1.4%	26,211	0.2%
D14 Rural Fringe	47	1.2%	13,625	0.3%
I35 Farming Heartland	41	1.0%	24,257	0.2%
I36 Ancestral Memories	23	0.6%	17,437	0.1%
I34 Rural, some commuting	15	0.4%	4,822	0.3%
D17 New Areas	14	0.3%	2,725	0.5%
C12 Centres of Tourism	10	0.2%	3,964	0.3%
I31 Remote, Some Industry	10	0.2%	4,024	0.2%
G23 High Rise Residents	5	0.1%	1,620	0.3%
D16 Barracks Life	0	0.0%	667	0.0%
Total	4,049	100.0%	712,772	0.6%

Characteristics of Four Prominent Mosaic NI Groups

Wealth & Wisdom (23% overall): These are generally married couples with grown up children. They are well educated and comfortable, with prestigious jobs on high incomes. They live in detached homes on spacious plots. They are comfortably off and enjoy golf and classical music.

Age Ranges:	Marital Status:	Qualifications ² :	Employment Status:	Income Bands:
Above average levels of 45-64, 65+ and 85+ year olds.	Above average levels of married couples.	Above average levels of 5+ 'O' Levels, 2 + 'A' Levels and Degrees	Above average level of full time and part time employment.	Above average levels of annual household incomes of £25,000+ and £50,000+.

Better Off Families (12% overall): These are generally married couples with children who are family focused. They have professional occupations on good incomes, and are ambitious with a strong work ethic. They live in modern detached housing with generous gardens and like to keep up appearances. They are generally well informed and financially astute.

Age Ranges:	Marital Status:	Qualifications:	Employment Status:	Income Bands:
Above average levels of 5 – 17 year olds and 45 – 64 year olds. Average levels of 25 – 44 year olds.	Above average levels of married couples.	Above average levels of 5+ 'O' Levels, 2 + 'A' Levels and Degrees	Above average level of full time and part time employment.	Above average levels of annual household incomes of £25,000+ and £50,000+. Average levels of £13,500 - £24,999.

Ageing Suburbanites (18% overall): These are generally married couples, many of whom are empty nesters and approaching retirement. They live in semi-detached housing and have White collar office jobs. They represent the "Middle" Northern Ireland and have the middle incomes to match, so they are careful with money. They have strong community networks and enjoy golf and wine.

Age Ranges:	Marital Status:	Qualifications:	Employment Status:	Income Bands:
Above average levels of 45 – 64 year olds, 64 + and 85+ year olds. Average levels of 25 – 44 year olds.	Above average levels of married couples. Average levels of co-habiting couples.	Above average levels of 1+ 'O' Levels, 5+ 'O' Levels, 2+ 'A' Levels and Degrees	Above average level of full time and part time employment.	Above average levels of annual household incomes of £13,500 - £24,999, £25,000+ and £50,000+.

Students & Singles (17% overall): These are generally students or graduates, well-educated but with low incomes. They live in a variety of house types in and around the main arteries into Belfast. They are socially and politically aware, but financially carefree. They tend to frequent cafes and bars.

Age Ranges:	Marital Status:	Qualifications:	Employment Status:	Income Bands:
Above average levels of 18-24 year olds, 25-44 year olds and 85+ year olds. Average levels of 65+ year olds.	Above average levels of single, co-habiting and divorced people. Average levels of widowers.	Above average levels of 2+ 'A' Levels and Degrees	Above average levels of unemployed and full time employment.	Above average levels of annual household incomes of under £7,500 and £50,000 +. Average levels of £7,500 to £13,499.

² Or GCSEs, or equivalent NVQs etc.

Age Ranges of all Mosaic NI Types

Type	Household Bookers	% Booker	Above average levels of:	Average levels of:
A03 Cultural Avant Garde	442	11%	46-55, 56-65 and 66+	36 – 45
F20 Terraced Melting Pot	309	8%	26-35 and 36-45	None
A01 Business Leadership	284	7%	18-25, 46-55 and 56-65	None
C08 Stable Family Semis	217	5%	56-65 and 66+	46 – 55
F21 Local and Commercial	197	5%	26-35, 36-45 and 66+	None
A02 Monied Empty Nesters	192	5%	46-55, 56-65 and 66+	None
B05 Public Service Ethos	188	5%	18-25, 46-55 and 56-65	None
B06 Commuting Country	183	5%	18-25, 46-55 and 56-65	None
F22 Student Culture	182	4%	26-35 and 36-45	None
C09 Multi - family Semis	160	4%	18-25 and 46-55	None
E19 Blue Collar Thrift	141	3%	55-65 and 66+	None
C07 Community Stalwarts	129	3%	18-25, 46-55, 56-65 and 66+	None
B04 High Achievers	128	3%	18-25, 26-35, 36 to 45 and 46-55	None
C10 Middle of the Road	127	3%	18-25, 26-35, 36 to 45 and 46-55	55-65
D15 Young Mortgagees	105	3%	26-35 and 36 to 45	None
C11 Suburban Retirement	102	3%	56-65 and 66+	None
I32 Rural Entrepreneurs	95	2%	18-25 and 46-55	None
D13 Small Town Success	90	2%	26-35 and 36 to 45	None
G24 Pensioners in Flats	86	2%	36-45, 56-65 and 66+	None
G25 Market Town Seniors	76	2%	56-65 and 66+	None
I33 Marginal Farmland	75	2%	18-25, 46-55 and 56-65	None
H27 Proud Traditions	70	2%	26-35 and 66+	36-45
H29 Moving up, Staying On	65	2%	18-25, 46-55 and 56-65	66+
G26 Breadline Pensioners	63	2%	56-65 and 66+	36-45
H28 Hard Pressed Owners	62	2%	26-35 and 36-45	None
E18 Small Town Estates	61	2%	18-25 and 46-55	None
H30 Cycles of Poverty	55	1%	18-25, 26-35 and 46-55	None
D14 Rural Fringe	47	1%	26-35 and 36 to 45	None
I35 Farming Heartland	41	1%	56-65 and 66+	46-55
I36 Ancestral Memories	23	1%	26-35 and 36-45	None
I34 Rural, some commuting	15	0%	56-65 and 66+	None
D17 New Areas	14	0%	18-25 and 26 – 35	36-45 and 56-65
C12 Centres of Tourism	10	0%	36 to 45, 56-65 and 66+	None
I31 Remote, Some Industry	10	0%	18-25 and 46-55	None
G23 High Rise Residents	5	0%	56-65 and 66+	26-35 and 36-45
D16 Barracks Life	0	0%	26-35 and 36 to 45	18-25 and 46-55
Total	4,049	100%		

Marital Status of all Mosaic NI Types

Type	Household Bookers	% Booker	Above average levels of:	Average levels of:
A03 Cultural Avant Garde	442	11%	Co-habiting, Married and Widowed	None
F20 Terraced Melting Pot	309	8%	Single, Co-habiting and Divorced	None
A01 Business Leadership	284	7%	Married	None
C08 Stable Family Semis	217	5%	Married and Widowed	Co-habiting
F21 Local and Commercial	197	5%	Single, Co-habiting, Divorced and Widowed	None
A02 Monied Empty Nesters	192	5%	Married and Widowed	None
B05 Public Service Ethos	188	5%	Married	None
B06 Commuting Country	183	5%	Married	None
F22 Student Culture	182	4%	Single and Co-habiting	None
C09 Multi - family Semis	160	4%	Married	Single
E19 Blue Collar Thrift	141	3%	Co-habiting, Divorced and Widowed	None
C07 Community Stalwarts	129	3%	Married	None
B04 High Achievers	128	3%	Married	None
C10 Middle of the Road	127	3%	Co-habiting and Married	None
D15 Young Mortgagees	105	3%	Co-habiting and Married	None
C11 Suburban Retirement	102	3%	Divorced and Widowed	None
I32 Rural Entrepreneurs	95	2%	Married	None
D13 Small Town Success	90	2%	Married	None
G24 Pensioners in Flats	86	2%	Single, Co-habiting, Divorced and Widowed	None
G25 Market Town Seniors	76	2%	Single, Co-habiting, Divorced and Widowed	None
I33 Marginal Farmland	75	2%	Married	Single
H27 Proud Traditions	70	2%	Single, Co-habiting, Divorced and Widowed	None
H29 Moving up, Staying On	65	2%	Single, Divorced and Widowed	None
G26 Breadline Pensioners	63	2%	Single, Divorced and Widowed	None
H28 Hard Pressed Owners	62	2%	Single, Co-habiting and Divorced	Married
E18 Small Town Estates	61	2%	Single and Widowed	None
H30 Cycles of Poverty	55	1%	Single, Co-habiting and Divorced	None
D14 Rural Fringe	47	1%	Co-habiting and Married	None
I35 Farming Heartland	41	1%	Married	None
I36 Ancestral Memories	23	1%	Married	None
I34 Rural, some commuting	15	0%	Married	None
D17 New Areas	14	0%	Co-habiting and Married	None
C12 Centres of Tourism	10	0%	Widowed	Single
I31 Remote, Some Industry	10	0%	Married	None
G23 High Rise Residents	5	0%	Single, Co-habiting, Divorced and Widowed	None
D16 Barracks Life	0	0%	Married	None
Total	4,049	100%		

Qualifications of all Mosaic NI Types

Type	Household Bookers	% Booker	Above average levels of:	Average levels of:
A03 Cultural Avant Garde	442	11%	5+ 'O' Levels, 2+ 'A' Levels, Degree	None
F20 Terraced Melting Pot	309	8%	2+ 'A' Levels and Degree	None
A01 Business Leadership	284	7%	5+ 'O' Levels, 2+ 'A' Levels, Degree	None
C08 Stable Family Semis	217	5%	1+ 'O' Level , 5+ 'O' Levels, 2+ 'A' Levels, Degree	None
F21 Local and Commercial	197	5%	2+ 'A' Levels	1+ 'O' Level
A02 Monied Empty Nesters	192	5%	5+ 'O' Levels, 2+ 'A' Levels, Degree	None
B05 Public Service Ethos	188	5%	5+ 'O' Levels, 2+ 'A' Levels, Degree	None
B06 Commuting Country	183	5%	5+ 'O' Levels, 2+ 'A' Levels, Degree	None
F22 Student Culture	182	4%	2+ 'A' Levels and Degree	None
C09 Multi - family Semis	160	4%	5+ 'O' Levels, 2+ 'A' Levels, Degree	1+ 'O' Level
E19 Blue Collar Thrift	141	3%	1+ 'O' Level	None
C07 Community Stalwarts	129	3%	5+ 'O' Levels, 2+ 'A' Levels, Degree	None
B04 High Achievers	128	3%	5+ 'O' Levels, 2+ 'A' Levels, Degree	1+ 'O' Level
C10 Middle of the Road	127	3%	1+ 'O' Level , 5+ 'O' Levels, 2+ 'A' Levels, Degree	None
D15 Young Mortgagees	105	3%	1+ 'O' Level , 5+ 'O' Levels, 2+ 'A' Levels, Degree	None
C11 Suburban Retirement	102	3%	5+ 'O' Levels, Degree	None
I32 Rural Entrepreneurs	95	2%	5+ 'O' Levels	2+ 'A' Levels
D13 Small Town Success	90	2%	1+ 'O' Level , 5+ 'O' Levels, 2+ 'A' Levels, Degree	None
G24 Pensioners in Flats	86	2%	None	None
G25 Market Town Seniors	76	2%	None	1+ 'O' Level
I33 Marginal Farmland	75	2%	5+ 'O' Levels	1+ 'O' Level
H27 Proud Traditions	70	2%	1+ 'O' Level	None
H29 Moving up, Staying On	65	2%	None	1+ 'O' Level
G26 Breadline Pensioners	63	2%	None	None
H28 Hard Pressed Owners	62	2%	1+ 'O' Level , 5+ 'O' Levels, 2+ 'A' Levels	None
E18 Small Town Estates	61	2%	None	1+ 'O' Level
H30 Cycles of Poverty	55	1%	1+ 'O' Level	None
D14 Rural Fringe	47	1%	1+ 'O' Level , 5+ 'O' Levels, 2+ 'A' Levels	Degree
I35 Farming Heartland	41	1%	5+ 'O' Levels	None
I36 Ancestral Memories	23	1%	5+ 'O' Levels	1+ 'O' Level
I34 Rural, some commuting	15	0%	5+ 'O' Levels	None
D17 New Areas	14	0%	1+ 'O' Level , 5+ 'O' Levels, 2+ 'A' Levels, Degree	None
C12 Centres of Tourism	10	0%	5+ 'O' Levels, 2+ 'A' Levels, Degree	None
I31 Remote, Some Industry	10	0%	5+ 'O' Levels	1+ 'O' Level
G23 High Rise Residents	5	0%	None	1+ 'O' Level
D16 Barracks Life	0	0%	1+ 'O' Level , 5+ 'O' Levels, 2+ 'A' Levels	None
Total	4,049	100%		

Employment Status of all Mosaic NI Types

Type	Household Bookers	% Booker	Above average levels of:	Average levels of:
A03 Cultural Avant Garde	442	11%	Full Time, Part Time, Self-employed (with staff), Employee, Providers of unpaid care	None
F20 Terraced Melting Pot	309	8%	Full Time, Employee	None
A01 Business Leadership	284	7%	Part Time, Self-employed (with staff), Self – Employed (without staff), Work at home, Small or home office, Providers of unpaid care	None
C08 Stable Family Semis	217	5%	Full Time, Part Time, Employee, Providers of unpaid care	None
F21 Local and Commercial	197	5%	Unemployed	Full Time, Employee
A02 Monied Empty Nesters	192	5%	Part Time, Self-employed (with staff), Self – Employed (without staff), Work at home, Providers of unpaid care	Full time, Employee
B05 Public Service Ethos	188	5%	Full Time, Part Time, Self-employed (with staff), Employee, Providers of unpaid care	None
B06 Commuting Country	183	5%	Part Time, Self-employed (with staff), Self – Employed (without staff), Employee, Providers of unpaid care	Full Time
F22 Student Culture	182	4%	None	None
C09 Multi - family Semis	160	4%	Full Time, Part Time, Providers of unpaid care	Self –employed (without staff), Employee
E19 Blue Collar Thrift	141	3%	Full Time, Part Time, Employee	None
C07 Community Stalwarts	129	3%	Full Time, Part Time, Self-employed (with staff), Employee, Providers of unpaid care	None
B04 High Achievers	128	3%	Full Time, Part Time, Self-employed (with staff), Employee, Providers of unpaid care	None
C10 Middle of the Road	127	3%	Full Time, Part Time, Employee	Providers of unpaid care
D15 Young Mortgagees	105	3%	Full Time, Part Time, Employee	None
C11 Suburban Retirement	102	3%	Self-employed (with staff), Employee	None
I32 Rural Entrepreneurs	95	2%	Self-employed (with staff), Self –Employed (without staff), Work at home, Small of home office, Providers Of Unpaid Care	None
D13 Small Town Success	90	2%	Full Time, Part Time, Self-employed (with staff), Self –Employed (without staff), Employee, Work at home, Providers of unpaid care	None
G24 Pensioners in Flats	86	2%	Unemployed	Employee
G25 Market Town Seniors	76	2%	Unemployed, Employee	None
I33 Marginal Farmland	75	2%	Self-employed (with staff), Self –Employed (without staff), Work at home, Small of home office, Providers Of Unpaid Care	None
H27 Proud Traditions	70	2%	Unemployed, Part Time, Employee	None
H29 Moving up, Staying On	65	2%	Unemployed, Providers Of Unpaid Care	None
G26 Breadline Pensioners	63	2%	Unemployed	None
H28 Hard Pressed Owners	62	2%	Unemployed, Part Time	Full Time, Employee
E18 Small Town Estates	61	2%	Unemployed, Self-employed (with staff), Self –Employed (without staff), Work at home, Small of home office	None

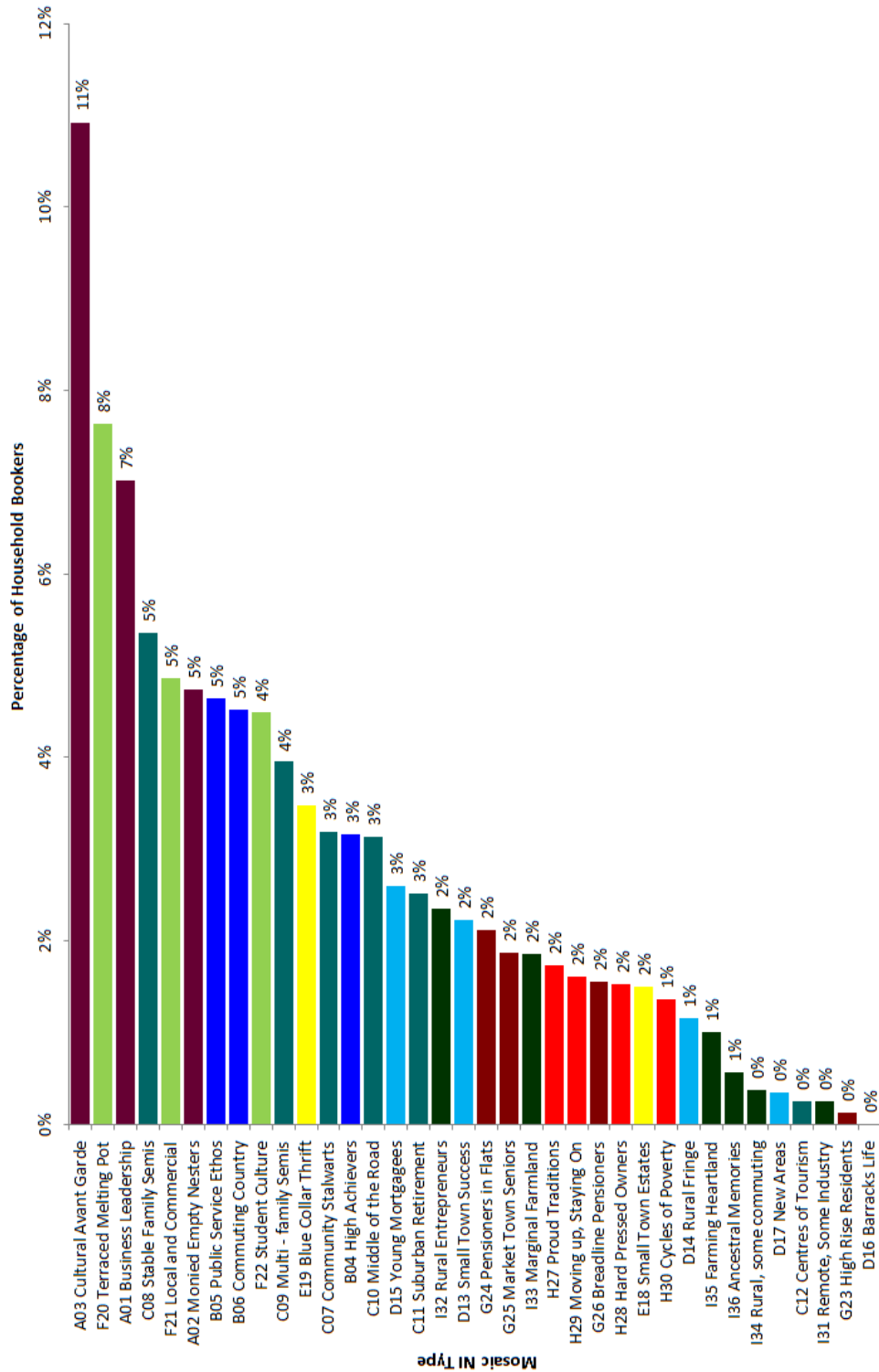
Employment Status of all Mosaic NI Types (continued)

Type	Household Bookers	% Booker	Above average levels of:	Average levels of:
H30 Cycles of Poverty	55	1%	Unemployed, Providers Of Unpaid Care	None
D14 Rural Fringe	47	1%	Full Time, Self-employed (with staff), Self – Employed (without staff), Employee	None
I35 Farming Heartland	41	1%	Self-employed (with staff), Self –Employed (without staff), Work at home, Small of home office, Providers Of Unpaid Care	None
I36 Ancestral Memories	23	1%	Self-employed (with staff), Self –Employed (without staff), Work at home, Small of home office, Providers Of Unpaid Care	None
I34 Rural, some commuting	15	0%	Self-employed (with staff), Self –Employed (without staff), Work at home, Small of home office, Providers Of Unpaid Care	Part Time
D17 New Areas	14	0%	Full Time, Self-employed (with staff), Self – Employed (without staff), Small of home office	Employee, Providers of unpaid care
C12 Centres of Tourism	10	0%	Self-employed (with staff), Self –Employed (without staff), Work at home, Small or home office	None
I31 Remote, Some Industry	10	0%	Self-employed (with staff), Self –Employed (without staff), Work at home, Small of home office, Providers Of Unpaid Care	None
G23 High Rise Residents	5	0%	Unemployed	None
D16 Barracks Life	0	0%	Full Time, Employee, Small of home office, Providers of unpaid care	None
Total	4,049	100%		

Household Income Levels of all Mosaic NI Types

Type	Household Bookers	% Booker	Above average levels of:	Average levels of:
A03 Cultural Avant Garde	442	11%	£25,000 - £49,999 and £50,000 +	None
F20 Terraced Melting Pot	309	8%	£25,000 - £49,999 and £50,000 +	£13,500 - £24,999
A01 Business Leadership	284	7%	£25,000 - £49,999 and £50,000 +	None
C08 Stable Family Semis	217	5%	£13,500 - £24,999 and £25,000 - £49,999	None
F21 Local and Commercial	197	5%	Under £7,499 and £7,500 - £13,499	None
A02 Monied Empty Nesters	192	5%	£25,000 - £49,999 and £50,000 +	£13,500 - £24,999
B05 Public Service Ethos	188	5%	£25,000 - £49,999 and £50,000 +	None
B06 Commuting Country	183	5%	£25,000 - £49,999 and £50,000 +	£13,500 - £24,999
F22 Student Culture	182	4%	Under £7,499	None
C09 Multi - family Semis	160	4%	£13,500 - £24,999, £25,000 - £49,999 and £50,000 +	None
E19 Blue Collar Thrift	141	3%	Under £7,499 and £7,500 - £13,499	None
C07 Community Stalwarts	129	3%	£13,500 - £24,999, £25,000 - £49,999 and £50,000 +	None
B04 High Achievers	128	3%	£25,000 - £49,999 and £50,000 +	None
C10 Middle of the Road	127	3%	£13,500 - £24,999, £25,000 - £49,999 and £50,000 +	None
D15 Young Mortgagees	105	3%	£25,000 - £49,999 and £50,000 +	£13,500 - £24,999
C11 Suburban Retirement	102	3%	Under £7,499 and £7,500 - £13,499	£13,500 - £24,999
I32 Rural Entrepreneurs	95	2%	£13,500 - £24,999, £25,000 - £49,999 and £50,000 +	None
D13 Small Town Success	90	2%	£13,500 - £24,999, £25,000 - £49,999 and £50,000 +	None
G24 Pensioners in Flats	86	2%	Under £7,499	£7,500 - £13,499
G25 Market Town Seniors	76	2%	Under £7,499 and £7,500 - £13,499	None
I33 Marginal Farmland	75	2%	£13,500 - £24,999, £25,000 - £49,999 and £50,000 +	None
H27 Proud Traditions	70	2%	Under £7,499 and £7,500 - £13,499	None
H29 Moving up, Staying On	65	2%	Under £7,499 and £7,500 - £13,499	£13,500 - £24,999
G26 Breadline Pensioners	63	2%	Under £7,499 and £7,500 - £13,499	None
H28 Hard Pressed Owners	62	2%	£7,500 - £13,499 and £13,500 - £24,999	Under £7,499 and £25,000 - £49,999
E18 Small Town Estates	61	2%	£7,500 - £13,499 and £13,500 - £24,999	Under £7,499
H30 Cycles of Poverty	55	1%	Under £7,499 and £7,500 - £13,499	None
D14 Rural Fringe	47	1%	£13,500 - £24,999, £25,000 - £49,999 and £50,000 +	None
I35 Farming Heartland	41	1%	£13,500 - £24,999	£7,500 - £13,499 and £25,000 - £49,999
I36 Ancestral Memories	23	1%	£13,500 - £24,999	£7,500 - £13,499 and £25,000 - £49,999
I34 Rural, some commuting	15	0%	£13,500 - £24,999, £25,000 - £49,999	£7,500 - £13,499
D17 New Areas	14	0%	Under £7,499, £7,500 - £13,499 and £13,500 - £24,999	None
C12 Centres of Tourism	10	0%	Under £7,499 and £7,500 - £13,499	None
I31 Remote, Some Industry	10	0%	£13,500 - £24,999, £25,000 - £49,999 and £50,000 +	None
G23 High Rise Residents	5	0%	Under £7,499 and £7,500 - £13,499	None
D16 Barracks Life	0	0%	£13,500 - £24,999 and £25,000 - £49,999	None
Total	4,049	100%		

Appendix 1: Mosaic NI Types Graph (Larger)



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OXFORD
ECONOMICS



Report to:	Development Committee
Subject:	Enterprise Support Initiatives Funded by ERDF
Date:	13 December 2011
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officers:	Shirley McCay, Head of Economic Initiatives, ext 3459

1	Relevant Background Information
1.1	Members will be aware that the Council's business and economic development support activities may be match funded by the European Regional Development Fund (ERDF). This requires an application for funding to be submitted and, if successful, a letter of offer is issued containing range of conditions which must be met before the funding can be drawn down.
1.2	Funding of up to 75% of overall project cost can be drawn down from Invest NI and Department for Enterprise, Trade and Investment (DETI) to support eligible activity, which complements other programmes and activities. The funding is provided under a measure which is ring-fenced for local council-led applications.
1.3	At the 10 October meeting of the Development Committee, Members were reminded of the opportunities offered by the support and were informed that a number of locally-based enterprise proposals had been presented to Council officers for consideration. Members agreed to officers working with local partners to develop appropriate enterprise development initiatives and submitting feasible projects for ERDF funding by the end of October 2011.
1.4	There is a rolling deadline for the submission of projects under this measure and the turnaround time from application to approval is generally up to 6 months.

2	Key Issues
2.1	As agreed by the October Committee, officers have engaged with some local partners to consider appropriate locally-based enterprise support initiatives and have also engaged in discussion with Invest NI to confirm that the proposed activities are potentially eligible for support and complement existing provision, subject to further assessment.
2.2	Invest NI have confirmed that, while some of the proposed activity may be eligible, the application – if successful – would be subject to relevant public procurement stipulations. This would mean that all activities and programmes would have to be tendered (as is currently the case for all Council-led activity in this field).
2.3	The implication for the locally-based schemes is that any funding being sought for local consortium-building or for establishing a local resource to manage the scheme would also have to be open to procurement or public advert. This is because the measure is a ring-fenced Council measure and any other delivery agent must be recruited through a public procurement exercise.
2.4	Much of the discussion with local partners to date has focused on the potential to establish a local resource to develop and manage a coordinated programme of delivery over a 2-3 year period.
2.5	At present, we have received an application from a Shankill-based enterprise consortium to support a range of enterprise development and social economy initiatives. We are also aware that an application is being prepared by a consortium group in west Belfast.
2.6	In order to progress these locally-based approaches, it is proposed that a joint application for local enterprise development activities be developed for the west Belfast and greater Shankill Task Force area. The content of this proposal will be developed by Council staff, in conjunction with relevant local partners in the respective areas – including Elected Members. This can then be submitted to Invest NI for funding. Members should be aware that this application process is currently taking around six months. The decision as to whether or not support can be granted is made by a panel consisting of Invest NI personnel. If approved, the programme elements would still be subject to public procurement.
2.7	This process is contrived because the ERDF measure is for Council-led projects only. There may be other funding sources that would be explored e.g. Social Investment Fund, Neighbourhood Renewal Funding, where the organisations or consortia can apply directly for funding. If relevant, Belfast City Council could consider providing match funding to these initiatives, instead of making the ERDF application.
2.8	In the current climate, it is clear that there is a need for focusing of resources in the areas of most need. The government departments – including Invest NI – have refocused their offering and the Council is planning to do the same through the proposed Stimulus Investment Package. However the administrative stipulations of some programmes often mean that a package of resources from a range of sources is required to address a specific challenge.
2.9	In the interim, there is still a programme of enterprise development activity under way by Council and other partners and there is always an opportunity to consider

	how this can be better targeted to get results and contribute to addressing the current challenges, including area-specific issues. However consideration does have to be given to the available resources for this work – both revenue and human resources – given that there are significant administrative and monitoring requirements involved in these programmes.
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3	Resource Implications
3.1	<u>Financial</u> Financial implications for Council dependent on scale of activity proposed and agreed. Up to 75% of project costs potentially available from Invest NI and DETI – for ERDF applications.

4	Equality and Good Relations Considerations
4.1	There are no specific equality and good relations considerations.

5	Recommendations
5.1	Members are asked to: <ul style="list-style-type: none"> - Note the update on the locally-based enterprise development activity - Note and agree proposed way forward to progress this issue.

6	Decision Tracking
	There is no specific decision tracking attached to this report.

7	Key to Abbreviations
	ERDF - European Regional Development Fund DETI - Department for Enterprise, Trade and Investment SIF - Social Investment Fund

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Belfast City Council

Report to:	Development Committee
Subject:	City Dressing Plan 2012 to 2013
Date:	13 December 2011
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officer:	Shirley McCay, Head of Economic Initiatives, ext 3459

1	Relevant Background Information
1.1	The Development Committee on 11 August 2010 approved the development of the Belfast City Dressing plan which would animate the city from 2011 through to 2013. The plan was the outcome of a review undertaken by TTC International on City Dressing and was overseen by a City Dressing Steering Group which includes stakeholder representatives from Council, Belfast Visitor and Convention Bureau (BVCB), Belfast City Centre Management (BCCM), the Department for Regional Development (DRD) and the Department for Social Development (DSD). The final recommendations were based on best practice in competitor cities, past activity, city branding, events potential and the city's Integrated Strategic Tourism Framework – Gateway to the Future.
1.2	The main objectives for the Belfast City Dressing Plan are: <ul style="list-style-type: none"> – Offer a warm Belfast welcome to our visitors – Create an atmosphere of special occasion across the city – Create interest about different parts of the city – Instil pride in our citizens and communities – Increase visitor footfall and spend across the city – Reinforce the Belfast Brand – Maximise opportunities presented by Titanic 2012, large scale city events, large scale conferences to the city, capital investment programme, cruise ship arrivals – Agree a co-ordinated approach to city-wide dressing with all key stakeholders – Leverage support and buy-in from stakeholders and where possible drive efficiencies
1.3	For phase 1, lamp post banners were agreed at key locations (primarily in the city centre) and the Development Committee on Wednesday 13 April 2011

	<p>endorsed the "<i>Patterns of the city</i>" designs. It was noted that, should any additional funding become available, the Committee would be consulted with a view to identifying additional locations for the erection of further banners. An additional project to dress empty units with Belfast literary quotes was also undertaken with support from NITB's Tourism Innovation fund.</p>
1.4	<p>Phase 1 of the City Dressing campaign was launched in July 2011 and has received largely positive media coverage and support from stakeholders across the city. There has been extensive community interest from the city centre focused campaign and a desire that the campaign is extended to other areas.</p>
1.5	<p>To date approximately 472 banners have been manufactured and erected with designs and patterns being inspired through community workshops and open calls to the public through the City Matters magazine. Eleven to 18 year old participants from Glencairn Youth Initiative, Falls Youth Providers and the Reach Project took photographs of their own areas and the city centre to showcase to visitors and locals what captivates them about Belfast. They worked together to suggest ideas and to talk through what Belfast means to them and what people may overlook about the city. Their ideas were translated into patterns and displayed on banners across the city. For the Christmas inspired patterns a call was issued via City Matters and attracted submissions from private individuals and Beechall Day Centre.</p>
1.6	<p>The patterns have been inspired by locations and objects unique to Belfast and the banners have been interspersed with the City 'B' Brand with a call to action via the visitor website site www.gotobelfast.com. A dedicated section is on the website to explain the patterns and visitor information on how to visit the buildings and themes they represent. Attached are examples of Christmas banners, proposed new 2012 banners and literary Belfast vacant shop dressing, as appendix 1.</p>
1.7	<p>The <i>Patterns of the city</i> approach has driven efficiencies. Whereby in previous years, the banners have been changed on a seasonal basis (at a cost of approximately £120,000 per annum) the Patterns of the City can now be updated and refreshed by adding to the themes during the year as opposed to incurring significant costs to produce and erect a new set of banners every 3 months. To date 472 banners have been manufactured, at a cost of £61,669 working out at £131 per banner and £4 per month over 3 year's life span (the estimated life of the current city dressing initiative).</p>
1.8	<p>Based on the budget allocation in previous years, £120,000 has been ring fenced for 2011/2012 and included in the budget estimates for 2012/2013 for city dressing. Members have already agreed to contribute £35,000 towards the Cow Parade in 2012 from the current 2011/2012 budget.</p>
1.9	<p>Obviously there has been a saving with the current approach, however due to the merits of City Dressing for the city it is recommended that Members continue investing in city dressing under the following areas:</p> <ul style="list-style-type: none"> - Extend the <i>Patterns of the city</i> to arterial routes/local tourism destinations; - Reinforce branding at key Events/Festivals including Tier 1 (audience over 30,000) and 2 (under 30,000) events as part of the 2012 and London Olympics programme; - Explore opportunities to dress Empty Shop Units; - Support physical animation in shared spaces to complement larger events e.g. busking and street theatre.

2	Key Issues
2.1	City Dressing is a key output of the Belfast Integrated Strategic Framework and BCC has made significant investment and taken the lead in developing a robust city dressing plan.
2.2	<p>It is critical that all agree to a clear and transparent criteria for City Dressing and Members are asked to support the following guidelines for 2011–2013:</p> <ul style="list-style-type: none"> – City dressing is integral to the City Brand and the building of that Brand – All new city dressing plans are based on the <i>Patterns of the city</i> concept and should carry the Belfast B – Where possible opportunities are provided for the citizens and communities of Belfast to participate in the development of new Patterns – Locations will be based on the Council’s local tourism destinations and arterial routes – Messaging/wording must be kept to a minimum and adhere to Department of Regional Development’s guidelines – New city dressing will comply with equality and good relations guidelines
2.3	The City Dressing Steering group has a strong representation among city stakeholders, however we have identified the need to include new members and would recommend extending membership to PLACE, who have undertaken work on empty retail units and NITB who currently have a budget for city dressing in 2012.
2.4	The roll out of city dressing to arterial routes and local tourism destinations will have to be on a phased basis (appendix 2). Officers recommend that the areas prioritised are aligned to priority areas already agreed under renewing the routes and local tourism destinations, in particular the city quarters i.e. Cathedral, Gaeltacht, Queen’s, Shankill and Titanic.
2.5	Officers have been liaising with NITB, who also have a budget for city dressing in 2012. Their proposals are attached as Appendix 3 and where possible we will be seeking NITB support to fulfil Council’s City Dressing plans through co-operative projects. Where possible, due to the level of investment from NITB into Tier 1 events, the City Centre banners will seek to carry the Our time, Our Place – Belfast 2012 branding (appendix 1).
2.6	Measuring success of the city dressing campaign will be important to show the return that investing in city branding at a localised level can bring. Officers will measure the impact through local survey’s, the Belfast Tourism Monitor and via www.gotobelfast.com .

3	Resource Implications
3.1	<p>The budget allocation for 2011/2012 is 85,000 and 2012/2013 is £120,000. It is recommended that it is split into the following areas:</p> <ul style="list-style-type: none"> – Extend the <i>Patterns of the city</i> to arterial routes/local tourism destinations - £90,000; – Reinforce branding at key Events/Festivals including Tier 1 (audience over 30,000) and 2 (under 30,000) events as part of the 2012 and London Olympics programme - £10,000 – Explore opportunities to dress Empty Shop Units - £10,000

	<ul style="list-style-type: none"> - Support physical animation in shared spaces to complement larger events e.g. busking and street theatre - £10,000 - Ongoing maintenance, storage and installation for 2 year period - £85,000
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4	Equality and Good Relations Considerations
4.1	There are no specific equality or good relations considerations attached to this report.

5	Recommendations
5.1	<p>Members are asked to;</p> <ul style="list-style-type: none"> - Agree to extend the city dressing initiative as outlined in paragraph 1.9 and - Agree that membership of the City Dressing Steering Group is extended to PLACE and NITB.

6	Decision Tracking
City Dressing plan update will be brought to Committee in May 2012.	
Timeframe:	May 2012
Reporting Officer:	Shirley McCay

7	Key to Abbreviations
DSD	Department for Social Development
BCC	Belfast City Council
NITB	Northern Ireland Tourist Board
BCCM	Belfast City Centre Management
BVCB	Belfast Visitor and Convention Bureau

8	Documents Attached
Appendix 1 – Patterns of the city and Literary Belfast Empty Unit Dressing	
Appendix 2 – Proposed locations of extended city dressing plan	
Appendix 3 – City dressing locations proposed by NITB	

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The city rises and falls
breathing...Belfast is R
it is Atlantis raised from
anywhere you stand, fr
the streets glitter like
strings of stars...Howe
size, it is magical.

Robert McLiam Wilson, *Barbican Street* (Scribner & Harbinger, 1996)
Reprinted by permission of The Random House Group Ltd

like music, like
ome with more hills:
m the sea. And from
om anywhere you look,
jewels, like small
ver many, whatever

LITERARY
BELFAST



literarybelfast.com

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2012 Banners 1-3 (Possible design options A-D)



Design Option A



Design Option B



Design Option C



Design Option D

NB: The reverse of these banners will carry the B logo against a solid colour.

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2012 Banners 1-3 (Possible design options A-D)



Design Option A



Design Option B



Design Option C



Design Option D

NB: The reverse of these banners will carry the B logo against a solid colour.

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TYPE OF ANIMATION	PROPOSED LOCATION
BANNERS	Linking City Centre to Titanic Quarter (East Belfast) via Oxford Street & Queen's Bridge
	Cathedral & North to include Crumlin Road
	Queen's Quarter
	Shankill Quarter
	Gaeltacht Quarter
Cow Parade	Various locations Not included in City Dressing report but plans worked up with the place destinations
Small scale entertainment during key dates throughout the yr.	Various locations During festivals, civic events - on street, branded animation.
Vacant Shop Units	City Centre pilot Working with City Centre Management.
Flag Fields	Various locations Dress venue locations, city parks, festival events.

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Appendix 3
 City Dressing NITB
 Belfast / NI 2012 OUR TIME OUR PLACE

City Centre	Belfast mast dressing
	Victoria Square lighting
	St George's Market bunting
	City Hall lighting (Jan-March 2012 or depending on Olympics rings conditions)
	Europa lighting/dressing
Cathedral / city link to Titanic	Big Fish wrap
	Red buoy at Big Fish dressing
	Weir wraps
	Lagan Lookout
	Albert Clock - wrap railings at bottom
	Obel building
Cathedral/city North	Uni Ulster bridge dressing
Harbour	Larsen building o
	Stena flags on roof
Various	Taxi wraps x 10 ni2012 generic (BCC doing 10-20 Titanic)
	Vacant shops window dressing
	Window stickers all shops
	Buses wraps
	Step stencils - location tbc
Titanic	Paint Hall
	Queen's Quay mesh banners
	Drawing Offices
	Titanic Quarter Titanic/ni2012 bannering
East Belfast	Stormont

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