Document Pack

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

12th September, 2013

<u>**MEETING OF DEVELOPMENT COMMITTEE**</u>

Dear Alderman / Councillor,

The above-named Committee will meet in the Lavery Room (Room G05), City Hall on **Tuesday, 17th September, 2013 at 4.30 pm**, for the transaction of the business noted below.

You are requested to attend.

Yours faithfully

PETER McNANEY

Chief Executive

AGENDA:

1. <u>**Routine Matters**</u>

    (a) Apologies
    (b) Minutes
    (c) Declarations of Interest
    (d) Request to Address the Committee - Forum for Alternative Belfast

2. <u>**Reconsidered Item - City Centre Business Support**</u> **(Pages 7 - 10)**

3. <u>**Deputation re: Northern Ireland Advice Group**</u>

4. <u>**Belfast's Economy**</u>

    (a) Study Visit to Bilbao (Pages 11 - 12)

    (b) Circuit of Ireland (Pages 13 - 16)

    (c) Global India Business Meeting and India Week - Review (Pages 17 - 34)

5. **Shaping Belfast**

   (a) Tourism Strategy (Pages 35 - 38)

   (b) Renewing the Routes - Procurement of Contractor (Pages 39 - 42)

   (c) Factors Influencing Belfast Residency - Research (Pages 43 - 130)

6. **Marketing Belfast**

   (a) City Dressing Plan 2013/2014 (Pages 131 - 134)

   (b) Public Display of Historical Artefacts in the City Centre (Pages 135 - 136)

7. **Neighbourhoods, Communities and People**

   (a) Loop River - Lease Renewal (Pages 137 - 138)

   (b) Routine Correspondence - Volunteer Now (Pages 139 - 144)

   (c) Children and Young People - Update (Pages 145 - 148)

   (d) Markets Community Centre - Keyholder Access (Pages 149 - 152)

   (e) Poverty and Inequality - Way Forward (Pages 153 - 158)

   (f) First Steps Early Years Group - Request for Funding (to follow)

8. **Operational Matters**

   (a) Departmental Finance Report - Quarter 1 (Pages 159 - 170)

   (b) Waterfront Hall - Performance Report (Pages 171 - 176)

   (c) Waterfront Hall Operating Costs (Pages 177 - 180)

   (d) Waterfront Hall Catering Contract (Pages 181 - 182)

   (e) Waterfront Hall - Sales Schedule (Pages 183 - 186)

Report to:	Development Committee
Subject:	Request to present to Committee – Forum for Alternative Belfast
Date:	17th September 2013
Reporting Officer:	John McGrillen, Director of Development, Ext 3470
Contact Officers:	John McGrillen, Director of Development, Ext 3470

1	Relevant Background Information
1.1	The Forum for Alternative Belfast (FAB) have made a request to present to the Development Committee the findings of their latest Summer School which was held in City Hall and Ulster Hall from 12th – 16th August.
1.2	FAB is a 'not for profit' organisation formed in 2009 with the aim of encouraging debate on how to influence and effect physical change in the City. The Forum has previously held a number of Summer and Winter schools which considered various city development issues.
1.3	Members may recall the Forum's 'Missing City' map which was developed as part of their Summer School in 2009. FAB has also been responsible for the '6 links' production which considered the impact of the DRD proposals for the York Street Interchange whilst their other work includes the publication 'Streets not Roads' and a design proposal for the redevelopment of Bank Square.
1.4	This year's Summer School considered the environmental infrastructure of the city including the role greenways and green spaces can play in place-shaping, accordingly FAB will be accompanied by a representative from the Landscape Institute of Northern Ireland and the Ulster Wildlife Foundation. It considered beneficial that FAB continue to engage with the Council on city development matters.

2	**Resource Implications**
2.1	None

3	**Equality and Good Relations Considerations**
3.1	None

4	**Recommendations**
4.1	It is recommended that Members accept the request from FAB to present to Committee in October 2013.

5	**Decision Tracking**
5.1	The Director's office will make the appropriate arrangements based upon the Committee's decision

6	**Documents Attached**
6.1	None

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Reconsidered Item
City Centre Business Information Point

Meeting of Development Committee, Tuesday, 20th August, 2013 4.30 pm (Item 10.)

The Committee considered the undernoted report:

"1 Relevant Background Information

1.1   Members will be aware that under the Review of Public Administration, the responsibility for enterprise will transfer to local councils. With this in mind the Economic Development Unit has begun to scope out potential enterprise initiatives to pilot prior to the transfer. Demand from businesses has highlighted a need for greater access to Council's services and easier access to the programmes and advice that are offered in the city.

1.2   One such pilot initiative is to provide a dedicated information resource in the city centre to deal with business start and development enquiries and to link businesses with council services including Building Control and Environmental Health as well as the suite of programmes provided by the Economic Development Unit. The space would also serve as an area to facilitate workshops, outreach development, showcasing venue and meeting space.

1.3   As part of our engagement with partner organisations on this issue, a number of organisations have confirmed that they would be supportive of this approach. In addition, one organisation has confirmed that it was also considering this approach and has identified the opportunity to collaborate on a pilot project in this field. This could provide an opportunity for Council to support a model to test a city-centre business information point.

2   Key Issues

2.1   Feedback from businesses and start ups in the city has identified that it can be difficult to obtain all the information needed to start up, grow and develop a business in the city. While there are numerous sources of information, there is not one central information point. As clients can have enquiries as wide-ranging as business planning, environmental issues, planning issues, recycling queries, building control matters and information on forming companies, it can be challenging for entrepreneurs to access all the information they require.

2.2   The recently commissioned Integrated Economic Strategy has identified a range of key issues facing Belfast post-RPA. Currently businesses in Belfast look to both BCC and Invest NI for advice, guidance and support. Post-RPA the great majority by number of businesses will look to the council alone. Forthcoming research suggests that many businesses are unaware of the breadth of services offered by the council or are unclear as to who they need to contact regarding the wide range of challenges that they face on a day-

to-day basis in their business. The Council's 2013 business survey (report currently at draft stage) also notes that while businesses continue to be interested in programmes like business planning and sales development there is also significant demand for advice on Building Control issues, Health and Safety and Licensing.

2.3   A centrally placed information point could provide an opportunity for proactive outreach to the business community, facilitate engagement with potential start-up entrepreneurs and give council a visible presence with local communities.

2.4   As part of our discussions with enterprise support partners, ORTUS have identified plans to consider the opening of a pop-up business information resource in a city centre location (premises have been identified – unit is currently vacant).   ORTUS was established in 1988 to actively promote sustainable social, economic and environmental regeneration by providing property and business development support. They are members of the Enterprise NI Network and deliver a range of business start and development programmes.

2.5   The proposed dedicated business information point would be staffed on a full-time basis and provide pre-start, start up and growth zones allowing clients to obtain information and signposting. The first floor of the premises will also be available as a space to facilitate enterprise outreach sessions including ideas generation, meetings and showcase space for businesses in a prime city centre location.

2.6   The resource could act as a signposting agent to the Council as well as other relevant bodies including: Invest NIRICS, NISP, HMRC, Advice NI, Banking sector, Labour Relations Agency, The Prince's Trust, UCIT/UNLTD, DEL, Universities and Colleges and HSENI

2.7   The business information point could provide an opportunity for those providing business advice services and support to work on a partnership basis providing a comprehensive and effective service for potential entrepreneurs and businesses in the city that is centred around the needs of the business – as opposed to the business having to seek out the support from a range of sources and across a number of locations.

2.8   Within the council, there is considerable support from Building Control to look at this proposal on a pilot basis with a view to improving the way in which the council interfaces with existing and would-be businesses and to developing flexible and targeted support services to address business growth issues.

2.9   In order to minimise the risk to the council and to allow us to explore this approach, it is proposed that a partnership is developed with ORTUS to pilot this approach, sharing the financial commitment for the first year of the service. Progress will be reviewed on a regular basis and efforts will be made to bring on additional internal and external partners with a view to providing a comprehensive one stop shop for business information and support, in a city centre location.

3 Resource Implications

3.1   Financial

The total cost for operating the unit for one year will be around £80,000. ORTUS have committed resources of £41,000 and have asked whether the Council could make a commitment of £39,000 towards staffing, fit-out and overhead costs. These resources can be made available within the council's enterprise support budget.

4 Recommendations

4.1   Approve the resourcing of a pilot business information point for one year, up to a value of £39,000 and to note the commitment to maximise the input from and referrals through to other business support agencies in the city and other council departments, in order to enhance the impact of this project."

A number of Members suggested that, rather than agreeing to accede to the request submitted to provide funding towards the establishment of the information point, the Council might have undertaken its own research to ascertain the market demand for the service within the City. In addition, it was suggested that, in order to achieve best value for the Council, an expressions of interest exercise could have been undertaken. A further Member expressed concern that the amount requested within the report had not been supported with a detailed breakdown of the associated costs.

Proposal

Moved by Councillor Reynolds,
Seconded by Councillor Hussey,

That the Committee agrees to defer, until its meeting on 17th September, consideration of the report to enable further detailed costs in respect of the request by ORTUS to be submitted for consideration.

On a vote by show of hands eight Members voted for the proposal and ten against and it was declared lost.

Further Proposal

Moved by Councillor Mac Giolla Mhin,
Seconded by Councillor Maskey,

That the Committee agrees to adopt the recommendation, subject to the circulation to all Members, prior to the meeting of the Council on 2nd September, of a breakdown of the detailed costs in respect of the request by ORTUS.

On a vote by show of hands ten Members voted for the proposal and nine against and it was declared carried.

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Agenda Item 4a

Report to:	Development Committee
Subject:	Collaboration between Belfast and Bilbao
Date:	17 September 2013
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	The former Lord Mayor of Belfast, Alderman Gavin Robinson previously received correspondence from the Office of the British Ambassador to Spain based in Madrid, Mr Giles Paxman CMG LVO.
1.2	Mr Paxman had written to encourage collaboration between Belfast and the City of Bilbao. This is based on a proposal to the Ambassador by the Head of the United Nations World Tourism Organisation (UNWTO), which is also based in Madrid.
1.3	Members considered the trip to Bilbao in April and it was agreed Officers would bring an update in due course.

2	**Key Issues**
2.1	The British Ambassador for Spain, Mr Giles Paxman, and the UNWTO Head, Mr Taleb Rifai, have proposed that BCC consider sending a team to Bilbao to explore the possibility for mutual learning and collaboration, and indeed to consider involvement of the current Lord Mayor of Belfast in this exploratory visit.
2.2	Mr Paxman has offered the support services of the UK Consul in Bilbao to assist BCC in planning such a visit, to involve relevant Bilbao authorities and local businesses as well as the Mayor of Bilbao, who has strong historical, industrial and commercial links with the UK.
2.3	The current proposed dates for the visit are the 18 and 19 November.
2.4	Invitations have been extended to relevant stakeholders across the City with the understanding that any costs will be met by the participating organisation/individual.

2.5	Officers have been in consultation with Northern Ireland Tourist Board (NITB) in respect of a previous delegation visiting Bilbao and integrating the learnings of that visit into this trip, ensuring the opportunity is maximised.

3	**Resource Implications**
3.1	The cost of the visit is being funded through the European Unit and an outline cost for the trip for two Officers and three Members to attend will be in the region of £3000 to cover the cost of flights, accommodation and subsistence.

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 Members are asked to agree to the allocation a budget of £3000 to cover the cost of flights, accommodation and subsistence.

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

7	**Key to Abbreviations**
UNWTO - United Nations World Tourism Organisation NITB – Northern Ireland Tourist Board	

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Report to:	Development Committee
Subject:	Global India Business Meeting (GIBM) 23-25 June 2013
Date:	17 September 2013
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officers:	Shirley McCay, Head of Economic Initiatives & International Development, ext 3459

1	**Relevant Background Information**
1.1	The purpose of this report is to update Development Committee on the key outcomes of the Global India Business Meeting (GIBM 23-25 June) and Belfast's India Week (22- 29 June).
1.2	At Development Committee on 8 May 2012, Members agreed to support the hosting of the Global India Business Meeting (GIBM) on 23-25 June 2013. GIBM is a major international networking event that brings together over 350 Chief Executives from major Indian companies with their European counterparts to examine the potential for trade and investment between the two regions.
1.3	Horasis as the event promoter has a partnership with leading Indian firms and uses this network to connect with other leading companies across the globe. Frank Richter, The CEO of Horasis was a Director of the World Economic Forum (Davos) from 2001 to 2004.
1.4	GIBM Belfast was the most extensive programme ever in the history of the GIBMs. 284 people attended the business meeting. There were bi lateral meetings with Ministers and organisations as well as individual programmes for interested companies. As a result of its success, Horasis have requested that Belfast consider hosting a Global China Business Meeting (See Appendix 1).
1.5	As part of the GIBM, Belfast City Council led on the development of a wider India week to embed the seriousness of BCC connecting with India, to entice Indian visitors to stay longer as well as engage local communities in Indian culture and business opportunities locally.
1.6	Building on the success of GIBM and India week, Council has the opportunity to seriously focus and refine our objectives in achieving results from collaborating with India and other stakeholders through the International Relations Framework.

2.	Key Issues
2.1	Global India Business Meeting BCC and co host Horasis was the promoter of the conference, BCC along with Invest NI (INI) were co hosts. Horasis organised the programme and secured international delegates. BCC was in the lead in producing the event locally through event management and directing logistics. BCC was also heavily engaged in inputting to the conference programme, securing local delegates, marketing and communications and organising the opening and closing headline events.
2.2	BCC was responsible for delivery of the event on the ground. BCC, Invest NI and Horasis worked productively on a proactive approach to ensure that the event was of direct benefit to Belfast and our local companies rather than simply hosting a conference.
2.3	BCC and Invest NI did this by carefully tailoring the programme to promote Belfast/Northern Ireland, ensuring Belfast speakers on the programme at every session, preparing for focused debates on the local economy as part of the wider programme, promoting the benefits and incentives of investment locally, advance contact with delegates to 'warm up' their interest in Belfast and NI, presenting an extensive tourism and leisure package and offering personalised itineraries for Indian target companies as part of their visit to Belfast.
2.4	Additionally BCC was in the lead in developing opportunities for local companies to benefit from the GIBM meeting.
2.5	Targets BCC with INI identified targets for GIBM in advance. These were; 10-15 new investment leads generated, 30 local companies provided with opportunities to connect to Indian companies, 150 C level Executives attending GIBM. All targets were exceeded. - There were 18 meaningful new investment leads developed. - There were 166 C level Executives, 97 were international (India, USA, and Canada), 69 were from Europe including the UK and Ireland. - Other participants included Chancellors of universities, politicians and senior government officials. - 47 local companies were provided with the opportunity to connect with Indian companies.
2.6	Key speakers and guests 23 June: The opening ceremony for GIBM was held in the City Hall on 23 June. Key people attending included: Union Minister of Commerce and Industry, Mr Ananda Sharma, Ms Arlene Foster, Minister for the Department of Trade and Investment, Cllr Máirtin Ó Muilleoir, Lord Mayor of Belfast, Naina Kidwai, President of FICCI, and D Shivakumar, President of AIMA.
2.7	The launch event also showcased the Assam Dancers, dancing the Bihu. The Assam dance comes from Northern India incorporating drums with traditional dance.

2.8	<u>24 June:</u> The 24 June consisted of 3 plenary sessions: 'India and World Economic Outlook', 'Big Bang Reforms – The View from Business' and 'India's Global Trade'. Peppered through these were boardroom dialogue session one topics such as: 'India's Finance Sector – Riding the Next Wave' and 'Near Shoring Opportunities in Europe'.
2.9	Mr Peter Robinson and Mr Martin McGuinness, the First and Deputy First Minister NI spoke at the 10:00 am plenary and officially welcomed the participants to Northern Ireland.
2.10	Other key speakers throughout the 24 June included; Union Minister of Commerce and Industry, Mr Ananda Sharma, The Minister for the North Eastern Region of India, Minister Ghatowar, Rt Hon Gregory Barker, UK, Mr Munjai, Managing Director of Hero Motocorp – largest two wheel motor manufacturer in the world, Professor Tony Gallagher, Pro Vice Chancellor, Queens University, Ashish Chauhan, CEO Bombay Stock Exchange and S Shibulal, CEO Infosys India (business technology IT services) and Professor Gerard Parr, University of Ulster, the leader of the UK-India-UK Centre of Excellence, first platform of its kind.
2.11	The closing dinner on 24 June was held in Titanic Belfast. Key speakers at this event included; Rt Hon Gregory Barker, Minister for India, Dr Farooq Abdullah, Indian Minister for Renewable Energy.
2.12	<u>25 June – Queens University Belfast</u> Queens University hosted an event as part of GIBM. This was offered to the visiting delegates as well as local participants.
2.13	The Minister for the North Eastern Region of India, Minister Ghatowar opened the event at Riddle Hall, Queens University.
2.14	The seminar focussed on 'A Partnership to Promote the Knowledge Economy'. Sir Peter Gregson discussed Global Education in the 21st Century, Professor Christopher Hardacre discussed Green Chemistry and Professor John McCanny discussed Cyber Security.
2.15	<u>Additional meetings</u> Additional meetings were organised throughout the GIBM. - First and Deputy First Minister NI met with the Indian Union Minister for Commerce, Mr Sharma. - First and Deputy First Minister also met with the FICCI delegation. - Minister Sharma also met with local businesses from NI and Rt Hon Gregory Barker, Minister of State for Climate Change UK (and Indian representative). - Indian Minister for Renewable Energy, Dr Farroq Abdullah met with Minister Foster, Rt Hon Minister Barker and various organisations interested in renewable energy, including Gerry Millar, Director of Property and Projects for BCC. - Indian Minister for the Development of the North East Region, Mr Ghatowar met with Minister Farry and also opened the Queens University Seminar. - Rt Hon Minister Barker met with First Source Solutions in Belfast. - Dr Bhagwati, High Commissioner of India to UK met with the Lord Mayor

	in the Lord Mayors Parlour as part of the welcoming reception. - INI organised bi lateral meetings with organisations in NI. For example, Mr Sanjiv Goenka, Chairman of RP – SG Group in India had meetings with Minister Foster, INI and First Source Solutions.
2.16	In addition to GIBM, BCC offered the following itineraries for delegates, these were sent in the form of communiqués from the Lord Mayor: - A tailored programme of meetings with Northern Ireland based companies organised by InvestNI. - Tourism Ireland sponsored organised tours. These included a city tour of Belfast, a trip to the Giant's Causeway and a boat tour around the Fermanagh Lakelands, close to the 2013 G8 summit location. - Personalised shopping trip. BCC also sent a communiqué to Indian organisations such as FICCI and AIMA to entice their members to come to GIBM and stay on in the city.
2.17	Additional guest invites to dinners Other organisations/representatives were invited to one or both of the evening events; they were there in their capacity of supporting BCC's development with the Indian market based on the International Marketing Framework – trade and investment, education and skills and business and leisure tourism.
2.18	Education Four pro vice chancellors from Northern Indian Universities are now visiting Belfast in September to explore possibilities after GIBM.
2.19	Tourism BCC organised tourism excursions of Belfast for various key participants. These included a cultural tour for Dr Farroq Abdullah, Minister for Renewable Energy, Rt Hon Gregory Barker, Mr Karan Thapar- eminent Indian journalist and Lord Bilimoria, Chairman of Cobra Beer.
2.20	Business Lord Rana had been instrumental in assisting with the development of GIBM and relations with India. The High Commissioner of India visited Belfast before and during GIBM. BCC will organise the follow up meeting with key stakeholders to discuss engagement and to maintain relations post GIBM.
2.21	INI and the UK India Business Council are planning a master class in working with India in October 2013.
2.22	Due to the success of GIBM, Frank Richter, Chairman of Horasis, has requested that Belfast City Council consider hosting the 2014 Global China Business Meeting (Appendix 1). Previous meetings have been held in Valencia (2011) and Riga (2012). The 2013 meeting will be held in The Hague, 10-11 November. Whilst there would be many benefits of undertaking this opportunity it is not considered feasible for BCC to accept the offer at this time due to lack of resources.
2.23	Lessons from the GIBM experience are that considerable officer time over a prolonged period of 6 months and beyond is required to organise the event and achieve tangible benefits for Belfast. Whilst Horasis issue the international invites and secure delegates all other activity in event conceptualisation,

	organisation and follow up is the responsibility of the local co-host such as BCC. Additionally Council ensured that the meeting connected local companies with business opportunities as well as creating an extensive international relations and civic programme. All of this means that a specific dedicated resource for the hosting of a meeting such as Global China is required which due to other priorities and limited resources is not available inside the Department at this time.
2.24	India Week Belfast City Council took the lead in developing an 'India Week' with other stakeholders to take advantage of GIBM being in Belfast as well as to highlight all aspects of Indian culture, business and education in Belfast and to profile the significant work undertaken by city partners in international development with India already.
2.25	The week ran from 22- 29 June. There were 30 events organised across the city. 10,622 people attended events during the week.
2.26	Council worked with a wide range of city stakeholders including Belfast Met, British Cultural Council, Arts Council, Arts Ekta, QUB, Lord Rana, The Lyric, Crescent Arts etc which are engaged as part of an India Stakeholders group in exploring events.
2.27	Media/communications A comprehensive media and advertising plan was devised for both GIBM and India Week.
2.28	The feedback from the press and advertising campaign shows that there were 77 separate news pieces covering the events in the media. This doesn't include the social media aspects including Facebook. India Week came 98th in all web pages over the entire year to 30 June 2013, which is excellent considering it was only live during June and surpassed all other business pages bar the landing page. The total unique page views to that date was 5175 and most people visited more than once (total pageviews 12,296). It peaked on Friday 21 June with over 1000 (total) pageviews that day alone. Pulse media was the media partner from India and we worked with them and international journalists to highlight people to be interviewed and the message that Belfast wished to convey. A full media room was set up in the Europa to facilitate interviewing of key participants.
2.29	All of GIBM was videoed and the clips can be seen on Youtube. Highlights 2013: http://youtu.be/YeDCVeK9oAE Promotional Film: http://youtu.be/qVnH75BRtN4
2.30	Actions within International Relations Framework Following the mission to India in April, feedback and discussions from the Indian Stakeholders group, GIBM and India Week, several actions have arisen for inclusion within the International Relations Framework. These actions are divided into the 3 segments of the International Relations Framework:

2.31	Trade and Investment:
	- Consideration is being given to participate in the EuroIndia Summit in Hyderabad 16-19 October. This summit will focus on the green economy and Gerry Millar, Director of Property and Projects, is considering involvement following his meeting with the Indian Minister for Renewable Energy and potential investment in the city.
	- Follow up of 18 investment leads for the city.
	- Review of 'sister' city/town in India.
	- Support and civic programme for the Indian creative industries sector, specifically film industry.
2.32	Education
	- Civic programme for the visit of four QUB pro vice chancellors in September.
	- Support for QUB, UU and BMet activity in India.
2.33	Tourism
	- Support and involvement with Belfast businesses engaging with India – e.g. Merchant Hotel and Titanic Belfast.
	- Tourism for Indian students families who visit as the main tourism driver to Belfast.
	- Promotion of Belfast as a tourism destination within India.

3	Resource Implications
3.1	Finance
	The budget set aside for the GIBM was max £160,000. InvestNI provided sponsorship to the level of £35,000 – totalling £195,000. The total spend was £187,212.63.

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 asked to note the review and agree that the follow up actions are included in the International Relations Action Plan.
5.2	Members are asked to agree to consider hosting Global China Business Meeting at a later stage due to lack of available resources at present.

6	Decision Tracking
There is no Decision Tracking attached to this report.	

7	Documents Attached
Appendix 1 – Final programme for GIBM	

Docs# 152388

8	Abbreviations
GIBM – Global India Business Meeting	
FICCI – Federation of Indian Chambers of Commerce and Industry	
AIMA – All India Management Association	

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Programme

Sunday, 23 June 2013 – Belfast City Hall

from 14.00 Arrival and check-in, Europa Hotel, Great Victoria Street

14.00–17.30 Registration at the Europa Hotel

From 18.00 Guided walk (5min) from the Europa Hotel to the Belfast City Hall, Donegall Square

From 18.00 Registration at the Belfast City Hall

18.00–19.30 Reception (Belfast City Hall)

Welcome
Horasis and the City of Belfast welcome participants to celebrate
the 5th Global India Business Meeting
- **Máirtín Ó Muilleoir**, Lord Mayor of Belfast, United Kingdom
- **Lord Diljit Singh Rana**, President, Andras House, United Kingdom
- **Frank-Jürgen Richter**, Chairman, Horasis, Switzerland

Virtual Ribbon Cutting Ceremony, with the co-hosts and co-organizers
- **Sachin Date**, Partner, Ernst & Young, United Kingdom
- **Arlene Foster**, Minister of Enterprise Trade and Investment, Northern Ireland, United Kingdom
- **Poul V. Jensen**, Director, European Business and Technology Centre (EBTC), Belgium
- **Sunil Kaushal**, Regional Chief Executive, India & South Asia, Standard Chartered Bank, India
- **Naina Kidwai**, President, FICCI; Country Head India, HSBC, India
- **Anil Kumar**, Chapter Chair, YPO; Chief Executive Officer, Ransat Group, United Kingdom
- **Máirtín Ó Muilleoir**, Lord Mayor of Belfast, United Kingdom
- **Geoffrey Van Orden**, Chairman, Europe India Chamber of Commerce; Member, European Parliament, United Kingdom
- **Lord Diljit Singh Rana**, President, Andras House, United Kingdom
- **D. Shivakumar**, President, AIMA; Senior Vice President, Nokia, Finland
- **Gunjan Sinha**, Chairman, MetricStream, USA

Chaired by
- **Frank-Jürgen Richter**, Chairman, Horasis, Switzerland

Message from Bollywod
- **Imtiaz Ali**, Film Director and Writer, India

Bihu Dancers from Assam
Enjoy the Bihu Dance – one of the most colorful folk dances of India.

19.30–21.30 **Opening Dinner: Northern Ireland Welcomes India** (Belfast City Hall)

India is the world's most populous democracy, raising expectations of the country's global aspirations. How will India nurture its new global leadership role? And how can Northern Ireland serve as hub for Indian business?

- **Arlene Foster**, Minister of Enterprise Trade and Investment, Northern Ireland, United Kingdom
- **Anand Sharma**, Union Minister of Commerce and Industry, India

Chaired by
- **Frank-Jürgen Richter**, Chairman, Horasis, Switzerland

Monday, 24 June 2013

from 07.30 **Registration** (Europa Hotel, Great Victoria Street, Belfast)

07.30–08.45 **Breakfast Sessions** (Europa Hotel)

From Austerity to Inclusive Growth (Grand 1)

The world today is characterised by pronounced fragility. What are the key imperatives for moving from austerity to inclusive growth?
- **Dirk Vantyghem**, Director, Eurochambres, Belgium
- **Chiara Corazza**, Managing Director, Greater Paris Investment Agency, France
- **Aryaman Dalmia**, Author of 'Graham, Buffett and Me', India
- **Biksham Gujja**, Founder and Chairperson, AgSri, Switzerland
- **Shehla Hasan**, Director India, Confederation of British Industry, India
- **Mohini Daljeet Singh**, Chief Executive, Max India Foundation, India

Chaired by
- **Lord Alderdice**, Member, House of Lords, United Kingdom

Addressing Risks (Grand 2)

How can firms – domestic and from abroad – effectively thrive in India and other developing economies while addressing attendant risks? How can they shield themselves from the multitude of internal and external challenges?
- **John B. Kidd**, Research Fellow, Aston Business School, United Kingdom
- **Vijay Pal Singh Sajwan**, Member, Uttarakhand Legislative Assembly, India
- **Bogdan Vacusta**, Managing Director, Elco Construct, Turkmenistan
- **Koumar Vijaya**, Chief Executive Officer, Captiveway, France
- **Amer Vohora**, Vice President, Rothschild Bank, Switzerland

Chaired by
- **Gunjan Sinha**, Chairman, MetricStream, USA

Redefining Governance, Introducing Accountability (Grand 3)

Weak governance and poor accountability have prevented India from unlocking its full economic and social potential. How can the administration respond to the needs and aspirations of its citizens?

- **Rupak Chattopadhyay**, President, Forum of Federations, Canada
- **Deirdre Hargey**, Chair of Development Committee, Belfast City Council, United Kingdom
- **Guna Mahalingam**, Managing Partner, NMG International Financial Services, Switzerland
- **Lou Marinoff**, Professor of Philosophy, The City College of New York, USA
- **Suneel Kumar Muttoo**, Chief Resident Commissioner, Government of Uttarakhand, India
- **Sanjay Rai**, Managing Director, Kandla Energy & Chemicals, India
- **Sudhir Sharma**, Chairman, Mitkat Services, India

Chaired by
- **Arun Nanda**, Member of the Board of Directors, Mahindra & Mahindra, India

The Power of Global Diaspora (Library Bar)

Indian and Irish people migrated all over the world carrying culture and entrepreneurial spirit with them. How can India and Northern Ireland tap into the potential of their diaspora?

- **Grainne McVeigh**, Chief Executive Officer, Northern Irish Connections, United Kingdom
- **Lord Diljit Singh Rana**, President, Andras House, United Kingdom
- **Gour Saraff**, Director, Europe India Chamber of Commerce, Spain
- **Didar Singh**, Secretary General, FICCI, India
- **Siddhant Vats**, Co-founder, Androidly Systems, India

Chaired by
- **Simon Bell**, Chief Executive Officer, Armillary Ventures, United Kingdom

09.00-10.00 Opening Plenary: India and World Economic Outlook (Exhibition Suite)

The world economy changes at an unprecedented pace as a result of hyper-connectivity and external shocks. What are the risks at the top of the global agenda in 2013-2014? How will the India economy perform?

- **Rahul Bajaj**, Chairman, Bajaj Auto, India
- **Sidharth Kumar Birla**, Chairman, Xpro India, India
- **John Cook, Chairman**, Rock Lake Associates, Switzerland
- **Niraj Sharan**, Chairman and Chief Executive Officer, Aura, USA

Welcome by
- **Peter Robinson**, First Minister of Northern Ireland, United Kingdom
- **Martin McGuinness**, deputy First Minister of Northern Ireland, United Kingdom

Chaired by
- **Frank-Jürgen Richter**, Chairman, Horasis, Switzerland

10.00-10.30 Contact Break

10.30–12.00 Boardroom Dialogue Sessions

Nearshoring Opportunities in Europe (Grand 1)

Highly skilled labour is making Northern Ireland and other European locations an increasingly attractive destination to Indian businesses for nearshoring manufacturing, R&D and services. How can Europe serve as hub for Indian investments?

- **Raymond Hegarty**, Managing Director, Intellectual Ventures, Ireland
- **Andrew McQuade**, Senior Vice President, Polaris, United Kingdom
- **Mark Runacres**, India Adviser, Confederation of British Industry, United Kingdom
- **Bala Subramanian**, Vice President, ITC Infotech, United Kingdom
- **Kai Vettel**, Managing Director, Pack Performance, Germany

Chaired by
- **Alastair Hamilton**, Chief Executive Officer, Invest Northern Ireland, United Kingdom

Exploring the Destiny of FDI (Grand 2)

Western companies are looking to expand their business to India. What are the opportunities and challenges of Foreign Direct Investment (FDI) in India and what strategies can lead to success?

- **Gary Collar**, Senior Vice President, AGCO Corporation, USA
- **Gaurav Dalmia**, Chairman, Landmark Holdings, India
- **Jochum Haakma**, Director, TMF Group, The Netherlands
- **Sudhir Jalan**, Chairman, Jalan Group, India
- **Sunil Kant Munjal**, Jt Managing Director, Hero MotoCorp, India
- **Vaughan Monroe**, Managing Director, Smylie Monroe, United Kingdom
- **Yatindra R Sharma**, Managing Director, KHS India, India
- **D. Shivakumar**, President, AIMA; Senior Vice President, Nokia, India
- **Jyotsna Suri**, Chairperson, Bharat Hotels, India

Chaired by
- **Sampa Bhasin**, Partner, Ernst & Young, United Kingdom

Infrastructure: Getting It Right (Grand 3)

Infrastructure in India is still facing key challenges. How to develop and implement the right infrastructure to maximize social and economic returns?

- **Shoummo Acharya**, Chief Executive Officer, eTrans Solutions, India
- **Andrew Fulton**, Director of Global Sales, CEM, United Kingdom
- **Roland Johansson**, Head of Economic Section of the India Division, European External Action Service, Belgium
- **Wolfgang Lehmacher**, Managing Director, CVA, Hong Kong SAR
- **Nasser Munjee**, Chairman, DCB Bank, India
- **Pierre-Marie Relecom**, Managing Partner, Relecom Partners, France
- **S. D. Shibulal**, Chief Executive Officer, Infosys, India
- **Martin Spollen**, Head of Investment Strategy, Strategic Investment Board, United Kingdom

Chaired by
- **Alan Rosling**, Chairman, Kiran Energy, India

Education and Skills Development (Library Bar)

Education systems in India are being made ready for the next wave of economic development. In what areas can government, academia and the private sector collaborate to deliver a new generation of leaders?

- **Rehan Allahwala**, Founder, Rehan School, USA
- **Parag Amin**, Founding Director, iCreate, USA
- **Andrew Hamilton**, Deputy Secretary, Dept for Employment and Learning NI, United Kingdom
- **Tony Gallagher**, Pro Vice Chancellor, Queens University, United Kingdom
- **Jason L. Ma**, Founder and Chief Executive Officer, ThreeEQ, USA
- **Marie Therese McGivern**, Chief Executive Officer, Belfast Metropolitan College, United Kingdom
- **Alok Sharma**, Member of Parliament, United Kingdom
- **Rekha Sethi**, Director General, All India Management Association, India
- **I. Unnikrishnan**, Deputy Chief Executive Officer, Manappuram Finance, India

Chaired by
- **Anjali Raina**, Executive Director, Harvard Business School India Research Centre, India

12.00-12.30 Plenary: Europe and India: Forging a New Growth Partnership ((Exhibition Suite)

While the European Union is experiencing an unprecedented economic crisis, India is grappling with the pressures of inclusive development. How can India and Europe forge a new growth partnership?

- **Vince Cable**, Secretary of State for Business, Innovation and Skills, United Kingdom
- **Anand Sharma**, Union Minister of Commerce and Industry, India

Chaired by
- **Naina Kidwai**, President, FICCI, India

12.30-13.00 Indian Business Leaders of the Year (Exhibition Suite)

Announcing the 2013 Indian Business Leaders of the Year, we will celebrate outstanding entrepreneurs who have been building and leading successful global Indian firms.

With
- **Anand Sharma**, Union Minister of Commerce and Industry, India

Chaired by
- **Sachin Date**, Partner, Ernst & Young, United Kingdom

13.00-14.00 Networking Lunch (Foyer)

An opportunity to share ideas and insights in an informal setting, promoting B2B exchange.

14.00-15.00 Plenary: Big Bang Reforms – The View from Business (Exhibition Suite)

The Indian government announced a fresh round of major reforms. With India's economy at crossroads, what are the prospects for political and economic reforms? How do business leaders advance their corporate agenda in an environment of policy change?

- **Ashish Chauhan**, Chief Executive Officer, Bombay Stock Exchange, India
- **Ian Coulter**, Chairman, CBI Northern Ireland, United Kingdom
- **Rajive Kaul**, Chairman, Nicco Group, India
- **S. D. Shibulal**, Chief Executive Officer, Infosys, India

Chaired by
- **Karan Thapar**, President, infotainement Television, India

15.00-16.30 Boardroom Dialogue Sessions

Planting the Seeds of Low-carbon Growth (Grand 1)

To reignite economic and ecological development, India is shifting gears towards clean technologies and greener pastures. What partnerships are needed to stimulate a new wave of low-carbon growth?

- **Anil Kumar**, Chief Executive Officer, Ransut Group, United Kingdom
- **Rachna Kejriwal**, Chief Executive Officer, Kejriwal Paper, USA
- **Sarvesh Kumar**, Deputy Managing Director, RRB Energy, India
- **Sameer Ladkat**, Chairman, Panama Group, India
- **Ravi Pandit**, Chairman, KPIT Cummins Info Systems, India
- **Chayan H. Shah**, Managing Director, Premier's Tea, India
- **David Surplus**, Chief Executive Officer, B9 Energy, United Kingdom
- **Rajiv Vastupal**, Chairman & Managing Director, Rajiv Petrochemicals, India

Chaired by
- **Gregory Barker**, Minister of State for Energy and Climate Change, United Kingdom
- **Poul V. Jensen, Director**, European Business and Technology Centre (EBTC), Belgium

Retail: The Next Big Thing? (Grand 2)

The Indian government approved a plan to allow foreign firms to invest in multi-brand retail stores. How can retail and improved supply chains create trickle-down effects for consumers and Indian society at large?

- **Tom Adams**, Global Head of Strategy, FutureBrand, United Kingdom
- **Sanjiv Ahuja**, Chairman, Ahuja Investments, USA
- **R K Mehrotra**, Executive Chairman, Foresight Limited, United Kingdom
- **Dan Oiknine**, Chairman, Chamber of Commerce and Industry France – India, France
- **Tony ONeill**, Director, Moy Park, United Kingdom

Chaired by
- **Lord Karan Bilimoria**, Chairman, Cobra Beer Partnership, United Kingdom

Enabling Service Industries (Grand 3)

The share of service industries, including the creative sector, in global trade is rising steeply. What opportunities does India offer for this booming part of its economy?

- **Imtiaz Ali**, Film Director and Writer, India
- **R.K. Deshpande**, Executive Vice Chairman, Asian Institute of Oncology, India
- **Mirjana Dimc-Perko**, Chairman, inCon, Slovenia
- **Geoffrey Van Orden**, Member, European Parliament, United Kingdom
- **Ishan Raina**, Founder and Chief Executive Officer, ooh Media, India
- **Mouli Raman**, Co-founder and Managing Director, OnMobile, India

Chaired by
- **David Gavaghan**, Chief Executive Officer, Titanic Quarter Limited, United Kingdom

The Innovation Imperative (Library Bar)

Indian firms are increasingly pursuing innovation-centric strategies. How can they leverage major shifts in the global economy to ensure that innovation related investments increase corporate performance?

- **Gaurav Burmam**, Managing Director, Dabur, India
- **John Cook**, Chairman, Rock Lake Associates, Switzerland
- **Vinod Juneja**, Managing Director, Braj Binani Group of Industries, India
- **Rajeev Mantri**, Executive Director, Navam Capital, India
- **H.R. Nagendra**, Chancellor, Chancellor, S-VYASA Yoga University, India
- **Sushil Premchand**, Managing Director, PRS Services, Switzerland

Chaired by
- **Guy Spier**, Chief Executive Officer, Aquamarine Capital, Switzerland

16.30–17.00 Contact Break

17.00–18.30 Boardroom Dialogue Sessions

India's Finance Sector – Riding the Next Wave (Grand 1)

India's finance sector is witnessing a fundamental transformation since the country announced further reforms. What should domestic and foreign firms do to thrive in this strategic environment?

- **Timothy Beardson**, Chairman, Albert Place Holdings, Hong Kong SAR
- **Ashish Chauhan**, Chief Executive Officer, Bombay Stock Exchange, India
- **Jiten Doshi**, Founder, Enam Asset Management Co., India
- **John Healy**, Director Citi Service Centre Belfast, Citi, United Kingdom
- **Sunil Kaushal**, Regional Chief Executive, India & South Asia, Standard Chartered Bank, India
- **Manish Kejriwal**, Managing Partner, Kedaara Capital Advisors, India
- **Naina Kidwai**, President, FICCI, India

Chaired by
- **John B. Kidd**, Research Fellow, Aston Business School, United Kingdom

Indian Technology Pioneers' Global Awakening (Grand 2)

India's IT, pharma and other new technology firms are emerging as global players in their own right. What areas are they pioneering in and how do they compete in world markets?

- **Mukesh Aghi**, Chief Executive, L&T Infotech, USA
- **N.S. Bala**, Senior Vice President, Wipro Technologies, India
- **Subodh Bhargava**, Chairman, Tata Communications, India
- **Vineet Gupta**, Founder and Chairman, Adhaere Pharmaceuticals, USA
- **Stacy Kenworthy**, Founder and Chairman, OptiGlobal, USA
- **Bikash Mathur**, Head – Europe Business, Polaris, United Kingdom
- **Gerard Parr**, Professor, University of Ulster, United Kingdom
- **Niraj Sharan**, Chairman and Chief Executive Officer, Aura, USA

Chaired by
- **Rt. Hon. Patricia Hewitt**, Chair, UK India Business Council, United Kingdom

Connecting Globally: Indian Firms Investing Overseas (Grand 3)

Indian firms increasingly invest overseas by means of M&A as well as greenfield initiatives. Which strategies work best when trying to break into foreign markets?

- **Avi Basu**, Chief Executive Officer and Founder, Connectiva Systems, USA
- **Tarun Gupta**, Co-Founder and Chief Executive Officer, T&A Consulting, India
- **Rajive Kaul**, Chairman, Nicco Group, India
- **Sanjay Kukreja**, Managing Director, ChrysCapital, India
- **K. K. Modi**, Chairman, Modi Enterprises, India
- **Aparup Sengupta**, Founder and Executive Chairman, Ananto, India

Chaired by
- **Deepak Premnarayen**, Chairman, ICS Group, India

Entrepreneurship – Charting the Way Forward (Library Bar)

Entrepreneurs are uniquely positioned to foster growth in India as the global economy recovers. How to create dynamic ecosystems to unlock the entrepreneurship potential?

- **Monish Ghatalia**, Managing Director, Focus Circle Brands, India
- **Kamil Hasan**, General Partner, Granite Hill India Opportunities Fund, USA
- **Maulik Jasubhai**, Group Chief Executive, Jasubhai Group, India
- **Nimish Kenia**, Founder, Happy Planet Amusement, India
- **Pratap Nambiar**, Executive Chairman, Thought Perfect, Singapore
- **Sven C. Oehme**, President, European-American Business Organization, USA
- **Alpesh Patel**, UKTI Dealmaker GEP, UKTI, United Kingdom
- **Rajeev Sheth**, Chairman, Tara Jewels, India

Chaired by
- **Didar Singh**, Secretary General, FICCI, India

18.30-19.30 Closing Plenary: Ensuring Inclusive Growth (Exhibition Suite)

Economic growth has to go along with an equally high rate of poverty reduction. Still, the elasticity of poverty reduction with respect to economic growth is lower in India than in other emerging markets. Is the trajectory we are on ensuring inclusive growth?

- **Paban Singh Ghatowar**, Minister of State, India

With

- **Timothy Beardson**, Chairman, Albert Place Holdings, Hong Kong SAR
- **Anil Kumar**, Chief Executive Officer, Ransat Group, United Kingdom
- **Sunil Kant Munjal**, Jt Managing Director, Hero MotoCorp, India
- **D. Shivakumar**, President, AIMA; Senior Vice President, Nokia, Finland

Chaired by

- **Frank-Jürgen Richter**, Chairman, Horasis, Switzerland

19.30-20.00 Shuttles to Titanic Belfast, Queen's Island

20.00-22.00 Closing Dinner – The Promise and Future of India (Titanic Belfast)

In this closing dinner, leaders from business and government outline the major outcomes of the Global India Business Meeting and discuss how India's future will be shaped by its connectivity with Northern Ireland, the UK and the world.

- **Gregory Barker**, Minister of State for Energy and Climate Change, United Kingdom
- **Farooq Abdullah**, Union Minister of New and Renewable Energy, India

Comment by

- **Sunil Kaushal**, Regional Chief Executive, India & South Asia, Standard Chartered Bank, India

Chaired by

- **Christopher Stalford**, Deputy Lord Mayor of Belfast, United Kingdom

22.00-23.00 Nightcap: The Impact of Indian Philosophy on the Global Village (Titanic Belfast)

Indian philosophy is the source of India's resplendent spirituality, and a wellspring of her longevity as a civilization. Less obvious to Indians, perhaps, is the pervasive influence of Indian philosophy on the West, which we will explore during this nightcap.

- **Lou Marinoff**, Professor of Philosophy, The City College of New York, USA
- **H.R. Nagendra**, Chancellor, S-VYASA Yoga University, India

From 22.00 Shuttles to the Europa Hotel

Tuesday, 25 June 2013

09.00-11.00 A Morning in Belfast

Participants are invited to join a guided tour to explore the vibrant city of Belfast.
We meet at 09.00 in the lobby of the Europa Hotel.
Transfer to Queens University at 11.00

**11.00-13.30 Seminar at Queens University on Higher Education and Industry:
'A Partnership to Promote the Knowledge Economy'**
(Queens University, Riddell Hall, Stranmillis Road, Belfast)

11.15-11.30 Welcome & Global Education in the 21st Century
• Peter Gregson, Vice Chancellor, Queen's University, UK

11.30-12.00 Green Chemistry
• Christopher Hardacre, Professor, Queen's University, UK

12.00-12.30 Cyber Security
• John McCanny, Professor, Queen's University, UK

12.30-13.30 Buffet Lunch and Networking Opportunity

Belfast City Council

Report to:	Development Committee
Subject:	Tourism Strategy Development 2014
Date:	September 2013
Reporting Officer:	John McGrillen, Director of Development
Contact Officer:	Ms Shirley McCay, Head of Economic Initiatives & International Development

1	Relevant Background Information
1.1	Members will be aware of the current Belfast Integrated Tourism Strategic Framework 2010-2014 which has shaped Belfast City Council's approach to tourism over this period of time.
1.2	The fundamentals of the strategy have been delivered with some elements due for completion between now and the end of the current financial year. This document was developed and delivered in partnership with key agencies across the City. A full review of this will be brought back for Committee consideration early in January 2014.
1.3	Regular progress reports have been communicated throughout the lifespan of the strategy. One of the platforms responsible for monitoring progress against actions has been the Belfast Tourism Forum which includes representatives from Government Departments, NITB, Tourism Ireland, as well as industry bodies and the destinations across the City. The Tourism Forum has provided an invaluable role in assisting with delivery and oversight for the strategy.
1.4	The strategy will be implemented by March 2014, so there will be a need for a new integrated tourism strategy to be developed in a partnership approach across the City and with relevant agencies.

2	Key Issues
2.1	During the period of the current Belfast Integrated Tourism Strategic Framework the landscape of the City has changed considerably. Large scale developments including Titanic Belfast have transformed the City and the 2012 experience in the City has been widely acknowledged as a resounding success.
2.2	Belfast's position as a truly International City Destination is undisputed with a number of awards being achieved during the period of the strategy. The next strategy must keep Belfast developing along this path being realistic but also aspiring to make huge strides forward.
2.3	The Belfast Tourism Monitor indicates that the value of direct tourism spend during 2012 was £416million, with 7.59m visitor trips to Belfast.
2.4	While the Belfast figures appear healthy there is a cautionary note in that the overall Northern Ireland context has been fairly static in terms of visitor numbers and economic return from tourism. A recent statement by the Board of NITB has raised concerns as to whether the figures outlined in the DETI strategy for tourism can be realised by 2020. While figures for the ROI are showing a resurgence with some commentators suggesting a 6% increase in visitor numbers in the last year this has not been the case for Northern Ireland. The GB market in particular has been in decline since 2005.
2.5	In 2011/12 NITB and Tourism Ireland undertook an extensive piece of work into the source markets for Northern Ireland. This research has provided very detailed market analysis and segmentation that will need to be fully integrated and acknowledged in any new integrated tourism strategy going forward for Belfast. This along with the Belfast Tourism Monitor will shape the discussions around all elements of the new strategy particularly product development, marketing and visitor servicing.
2.6	The strategy should look at a number of elements including some of the following issues; • Product Development; One of the Council's core roles with respect to tourism is product development. This will be a mix of soft product development but potentially further large scale development. The strategy should identify these projects in line with customer demand. • Marketing & Promotion; Taking on board extensive segmentation research developed by NITB and Tourism Ireland last year and ensuring delivery roles are clarified between Visit Belfast, NITB and Tourism Ireland. • Visitor Servicing; a significant review is required of all elements of the visitor experience such as; positioning of the Welcome Centre; the Visitor pass phase 2; airport information provision; information provision at Titanic Belfast and across the destinations; cruise passenger management being mindful of new developments by the Harbour Commissioners; use of new technologies in enhancing the visitor experience.

- Destinations; ongoing analysis and work required to develop the designated destinations to ensure the economic impact of tourism is spread across the City.

- Accommodation review; If Northern Ireland 2020 targets are to be achieved there is a need for further hotel bedstock within the City. Over the period of the current strategy hotel bedstock has grown significantly, however the aspiration is for further developments.

- Partnership working; There is a need to review partnerships across the City in respect of tourism to provide clarity on roles. The NITB is currently undergoing a review and it will be important that this strategy makes consideration for this; Tourism Ireland's role for Northern Ireland specifically continues to evolve, this role too needs explored to maximise benefits; Visit Belfast's role in the City is currently focussed on visitor servicing and promotion. Visit Belfast as key delivery partners role should be maximised; how we engage with the private sector to ensure every opportunity is taken to create business opportunities and to support future developments from the sector.

- Business Tourism; A fresh approach is required to ensure that the new developments at the Waterfront hall and the opportunity that gives to attract much larger conferences should be integrated into plans. Checking that the suitable support infrastructure is in place to deliver an integrated high quality experience for business visitors to the City.

- Internal integration; ensuring all activity within the Council is aligned and specifically within the TCA unit ensuring that the cultural groups supported are fully integrated into the visitor experience.

- RPA; Looking at any potential opportunities and implications that RPA will bring.

- Targets and Monitoring

The outlined list is not exhaustive but reflects a tourism landscape that has changed considerably and continues to evolve. It is important that Belfast City Council are shown to display leadership in respect of tourism and culture working to the optimum with partner agencies.

3	Resource Implications
3.1	A maximum budget of £40,000 from Council is proposed to be matched by a contribution from NITB.

4	Equality and Good Relations Implications
4.1	No specific equality or good relations considerations

5	Recommendations
	Members are asked to:
5.1	Give approval to proceed with procurement and commissioning of an agency to work with Officers within the TCA Unit to develop a new Integrated Tourism Strategy

6	Decision Tracking	
	It is recommended that upon appointment of the Consultants the Development Committee is continually consulted and updated on progress.	

Report to:	Development Committee
Subject:	Renewing the Routes Programme :Procurement of Contractor
Date:	17 September 2013
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officers:	Keith Sutherland, Urban Development Manager, ext 3578

1	**Relevant Background Information**
1.1	The ongoing Renewing the Routes Programme has delivered local regeneration projects at targeted locations across the arterial routes of Belfast since 2004. The programme has facilitated the investment of approximately £6.5million across these key routes and neighbourhoods.
1.2	In February 2012, the Committee agreed a four year rolling programme for the continuation of local regeneration across the target areas of the city (Appendix 1).
1.3	The four year rolling programme is mid way through delivery. We are currently on site on Newtownards Road (£150,000) from Bridge End to Witham St and on Ormeau Road (£150,000) from Ormeau Embankment to Ravenhill Road Roundabout. The next phases of the agreed programme will cover Oldpark Road/Andersonstown Road, Lisburn Road/Castlereagh Road and York Street/Shankill Road.
1.4	In addition to the programmed activity, resources have been secured from DSD for both the Newtownards Road (£155,000) and Lower Ormeau Road/Cromac Street (£155,000). Construction contracts are in place to enable works to be carried out in the existing areas and the Oldpark Road/Andersonstown Road Nodes.
1.5	The purpose of this report is to request delegated authority to invite tenders for construction related design services and construction contracts for carrying out works across all the remaining areas identified as part of the Renewing the Routes Programme.

2	**Key Issues**
2.1	The Renewing the Routes team will work in liaison with Project Management

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	Unit of Property and Projects Department who will manage the procurement of necessary construction related design services and construction contracts. The delegated authority for the procurement of proposed works will enable the project management unit to put in place the appropriate services to allow for the carrying out of works across all areas and the subsequent administration of the contracts.
2.2	To support the ongoing activity and successful implementation of the future programme, committee is requested to approve the invitation of tenders for construction related design services and construction contracts. These are required for the carrying out of the works across all the areas identified and the award of contracts to those firms submitting the tenders which are evaluated as being the most economically advantageous in terms of quality and cost criteria, in accordance with Council procurement guidelines.
2.3	The contracts for which permission is being sought will also provide the capacity for Council to deliver works that may be funded from external sources such as the Belfast Regeneration Office (BRO) should additional capital funding become available. As in the case of previous additional capital funding, any works carried out in partnership with external organisations will be on the basis of no cost to Council and subject to separate Committee approval.

3	Resource Implications
3.1	There are no additional resource implications attached to this report

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

5	Recommendations
5.1	It is recommended that Members approve the invitation of tenders for construction related design services and measure term contracts for the carrying out of the works across all the areas identified and the award of contracts to those firms submitting the tenders which are evaluated as being the most economically advantageous in terms of quality and cost criteria, in accordance with Council procurement guidelines.

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

7	Key to Abbreviations
BRO - Belfast Regeneration Office	

8	Documents Attached
Appendix 1 – Renewing the Routes Target Areas 2012-2016	

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Appendix 1: Approved Renewing the Routes Programme Areas 2012-2016

Year	Area	Road	Location
2012/13	South	Ormeau Rd £150,000	Ormeau Embankment to roundabout at Ravenhill Rd
	East	Newtownards Rd £150,000	Bridge End to Witham Street
2013/14	North	Oldpark Rd £150,000	Extended area from Oldpark Avenue to Cliftondene Crescent
	West	Andersonstown Rd £150,000	Hillhead Crescent to Suffolk Rd
2014/15	South	Lisburn Rd £150,000	Bradbury Place to Tates Avenue
	East	Castlereagh Rd £150,000	Beersbridge Rd to Grand Parade
2015/16	North	York Rd £150,000	Fife Street to York Street
	West	Shankill Rd £150,000	Peters Hill to Agnes Street

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Agenda Item 5c

Report to:	Development Committee
Subject:	Research on the factors influencing people's residency decisions in Belfast
Date:	17 September 2013
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officer:	Claire Patterson, Business Research & Development Manager, ext 3379

1	**Relevant Background Information**
1.1	Members will be aware that research was commissioned to identify the factors that influence people's decisions to live in the Belfast City Council area. The purpose of the research was to 'assess the attitudes of current and former residents, commuters and visitors on the attractiveness of the City'. It is widely recognised that a city's population is an important determinant of its economic and social success, as outlined in the impact of anchor institutions research, Belfast City Masterplan, BMAP etc. The intention was that the results would provide the Council with an insight into the reasons for population decline and enable it to develop plans/policies to boost the City's viability and attractiveness as a place to live.
1.2	The initial findings from the market research were presented to Committee in June 2013. Members will be aware that this research encompassed a literature review looking at push and pull factors that have impacted on peoples choices about where they have chosen to live and an attitudinal study to investigate the current profile of current and past residents of Belfast City Council, those who live in the areas surrounding Greater Belfast, and commuters, who work in Belfast but live elsewhere. The report is attached at Appendix 1 for information.

2	**Key Issues**
2.1	The research indicated that population change in Belfast has resulted primarily from natural demographic change - an increasing ageing population with death rates exceeding birth rates and therefore a natural decline in population. The total population of Belfast City Council has remained fairly static since 1991, when 279,237 people lived in the area. Between 2001 and 2011, the city's population rose by 1.3% to 280,962.This contrasts with the population change for Northern Ireland as a whole which increased by 15.8% and compared to other cities in the UK represents a small growth in population (e.g. Manchester's population increased by 19%; Liverpool's increased by almost 5%).

Docs# 152392

2.2	Belfast also experienced a lower level of increase in the number of households than Northern Ireland and has a smaller household size (2.3) than Northern Ireland (2.5). Across all areas there has been a fall in household size since 2001.
2.3	Within Belfast, wards in west Belfast have experienced the highest levels of population decline in the last ten years. That is, the Upper Springfield and Andersonstown wards had a 11.1% and 14.7% reduction in population respectively. Contrastingly, wards in south Belfast were most likely to have experienced the greatest incidence of population increase - Rosetta, Shaftesbury, Windsor and Ballynafeigh increased by 28.3%, 24.7%, 14.8% and 12.8% respectively.
2.4	The following table, from the report outlines the push and pull factors likely to influence the choice of residency area.

Type	Push	Pull
Physical	Noise pollution	Proximity to amenities
	House or garden size	Public transport links
	Traffic congestion	Access to outdoor environment
		Access to outdoor activities
Social/ Economic	Perception of safe environment	Family and friends
	Affordable housing	Community spirit
	Affordable cost of living	Long term residency
		Opportunities of community engagement
		School provision
		Proximity to employment
		Job opportunities

	The main social factors such as 'close to family and friends' and 'growing up in an area' were the dominant influencing factors; while the most prominent economic factors were 'good public transport' and 'being close to work'.
2.5	Encouragingly, the research showed that the majority of residents surveyed do not envisage themselves leaving the city (85%) and of those surveyed who lived outside the BCC area, those aged 18-35 years were also more likely to consider moving into Belfast. This has important implications for the wider marketing of the city. The main reasons why respondents may have moved from Belfast City Council were identified as house size and type, affordability of housing and cost of living, a sense of community spirit and being involved in the local community, influence of crime and anti-social and the political situation in Belfast. Conversely, the main factors that people reported as attracting them to move in to Belfast included physical factors, such as proximity to amenities and better public transport network.
2.6	The research identified a number of recommendations which have been categorised into the following themes, which are aligned to Council plans; principally, Investment Programme, Belfast Masterplan and Corporate Plan: - Physical transformation – create an environment and infrastructure that connects people to opportunities and where people want to live - Transforming ambition / perceptions – developing and promoting Belfast as an attractive, safe and sustainable city - Transforming services – maximise the accessibility and availability of the city as a hub for employment and amenities
2.7	Belfast City Council has a role in providing city leadership, influencing and enabling the regional agenda as well as delivering core services such as the provision and maintenance of parks and open spaces. Principally the research provides an

evidence base to help guide the delivery of a number of strands of work such as the Belfast Masterplan; building the city's rate base; neighbourhood working to promote safer and more cohesive communities; promoting the quality parks and open spaces and continuing the drive towards achieving 'Green Flag' quality award for parks. Importantly it will guide the wider marketing of Belfast, particularly at a local level and will directly inform the development of an integrated marketing strategy for the city, as agreed by Committee in August 2013. However, increasing the city's viability and attractiveness as a place to live requires effective partnership with a range of others, as no single agency has complete responsibility for city development and marketing.

2.8   In addition to the Council's strategies, there are a number of other key strategies that have an important influence on the recommendations to transform the city, its ambitions/perceptions and services; such as

- Regional Development Strategy (RDS) 2035
- Economic Strategy for Northern Ireland
- Investment Strategy for Northern Ireland
- Together, Building a United Community
- Belfast Metropolitan Area Plan - a ten year development plan
- Urban Regeneration and Community Development framework (DSD)
- Housing Strategy for NI (DSD)
- District Housing Plan and Local Housing Strategy- Belfast 2012-2013 (NIHE)
- Policing & Community Safety Partnership Plans (Belfast PCSP)
- Cultural Framework for Belfast 2012-2015

2.9   The review of the Belfast City Masterplan launched for consultation, which will run until November 2013, outlines a number of policy priorities and strategic projects to develop the city and its attractiveness as a place to live, work and visit. It takes a holistic approach to city development and acknowledges the importance of issues such as health, social inclusion, education, access to employment and services, community safety, neighbourhood quality and the environment which impact on quality of life. The population research reinforces the importance of many of these issues in influencing where people choose to live. The quality of life that a city offers, or is perceived to offer, is a key component to attract and retain its population.

2.10   The Future City Conference in May secured commitment from city stakeholders on the policy priorities and to collaborate on the delivery of the key themes within the masterplan i.e. the

- city centre - accessible vibrant and dynamic centre city driving the regional economy
- physical infrastructure and neighbourhoods - engender confident, caring, cohesive and resilient communities
- digital city - ultrafast broadband and integrated smart city infrastructure driving innovation and supporting growth and efficient delivery of public services
- low carbon city - Clean technology, renewable energy and efficiency will drive further growth in the economy and reduce costs for businesses and households

Progressing the workstreams, in partnership with city stakeholders, will be vital for the future vitality, perception and ambition of Belfast as a city where people choose to live.

2.11   From the Belfast City Masterplan, and other strategies, there are a number of key opportunities to take forward the recommendations arising from the research to

encourage population and city growth:

Physical Transformation:
- DSD plans for housing-led regeneration includes the selection of four pilot areas, including Belfast Lower Oldpark/Hillview, Tiger's Bay/Mountcollyer and Divis/Albert Street.
- Deliver the key projects identified in the Investment Programme 2012-2015
- Deliver the key strategic projects identified in the Belfast City Masterplan; including Rapid Transit and Royal Exchange
- Work with DSD and partners to capitalise on the relocation of the University of Ulster campus and its social and economic regenerative impact on the city centre
- Use the discussion document for student housing as a lever to reinvigorate the city centre and city centre living

Transforming ambitions/perceptions
- Develop a joint framework for delivery of the OFMDFM programmes: Delivering Social Change and Together Building United Communities
- Deliver the city's commitment to the World Health Organisation's age-friendly status to create an inclusive and accessible urban environment and encourage active healthy ageing
- Develop the city narrative and International Marketing Strategy to build a positive image of the city to attract tourists, investors, students and residents

Transforming services
- Work with partners to participate and take forward the IBM Smarter Cities Challenge in September/October 2013 which will result in a model/route map for decision-making on dealing with local disadvantage including better provision of services and facilities
- Deliver the Leisure Transformation Programme
- Progress the Integrated Economic Strategy for the city
- Work with partners to develop and deliver a city-wide employability and skills strategy and action plan

2.12	These actions are additional to the Council's programmes/plans of work which the research will help to shape, as indicated at para. 2.7. Appendix 2 includes an outline of these programmes/actions for Council; however, the development of the Integrated Marketing Strategy will be critical in conveying these messages beyond the city boundaries. Members have also raised the importance of housing mix within the context of growing the city's population and the research pointed to the desire for gardens/space. The Council will continue to lobby central government, within the context of the masterplan, Local Government Reform, including regeneration issues and ongoing work with DSD/NIHE in terms taking forward Strategic Study of Holyland and wider university area. It is also proposed that council officials meet with DSD to examine the pilot programme for housing led regeneration.
2.13	Research into best practice in other cities such as Liverpool that have experienced population decline emphasises the need to develop holistic approaches to tackle economic, social and environmental factors that affect population decline and growth. An integrated and planned approach to regeneration and planning policy will support sustained population and city growth. International research recommends a strategic framework for city development to take account of the wider social costs and benefits of different spatial development options and the inclusion of all stakeholders in the decision-making to encourage joint working, efficient use of resources and co-

	ordinated policy implementation. This approach would 'future proof' policies to enable the implications of demographic change to be built into all policy making processes at a local and national level.
2.14	Local Government Reform will result in an additional 50,000 citizens and an increased geography which will require services to transform but will also bring with it the transfer of planning and regeneration powers from central to local government. This provides an opportunity to integrate planning and regeneration policies to ensure that investment and decisions can be made to encourage the development of declining areas and ensure that accessibility and connectivity is maximised. The introduction of community planning will also bring together the various strands of governance in the city to encourage efficient use of resources and more co-ordinated implementation.
2.15	Population growth is a significant factor in the economic and social success of the city and as Local Government Reform moves forward it is essential that the city's infrastructure, amenities and services deliver for citizens and visitors. A co-ordinated and integrated approach to growing the city's population is required within the context of the various strategies referenced and particularly the Belfast city masterplan. Changes in the city's population will continue to be monitored and there is an opportunity to build on this research by aligning it to the Northern Ireland Longitudinal Survey which will provide an ongoing mechanism to assess the population and attitudes to city life.

3	Resource Implications
3.1	There are no additional resource implications attached to this report.

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

5	Recommendations
5.1	The Committee is asked - to agree to utilise the Northern Ireland Longitudinal Survey as an ongoing monitoring mechanism for population change in the city - to consider how best take this forward within the context of the strategies referenced - to agree to Council officers meeting with DSD to consider the approach to housing led regeneration pilots in Belfast - to note that consultation on the review of the Belfast City Masterplan will run from September-November 2013. Committee will receive regular updates on the strategies and the efforts to grow the city's population, as outlined.

6	Decision Tracking

Further to Committees consideration of the report:

Time line: December 2013   Reporting Officer: John McGrillen, Director of Development

Docs# 152392

7	Key to Abbreviations
BMAP – Belfast Metropolitan Area Plan DSD – Department for Social Development NIHE – Northern Ireland Housing Executive	

8	Documents attached
Appendix 1: Research Report Appendix 2: Summary of BCC actions	

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Market research to explore people's choices to live or move from the Belfast City Council Area

Report prepared for:
Belfast City Council

August 2013

Contents

Market research to explore people's choices to live or move from the Belfast City Council Area – August 2013

Executive summary

Belfast City Council commissioned Perceptive Insight to conduct research to explore the factors that are affecting people's decisions to live or move from the Belfast Local Government District (BLGD) area, through an analysis of potential *push* and *pull* factors.

The approach to the research was two-fold. The first phase included a review of the various factors that impact on people's choices about where they have chose to live; assessed population trends in the Belfast LGD and surrounding regions; explored influential policy documents; and summarised previous research findings.

The second phase involved the facilitation of an attitudinal study to investigate the profile of residents from Belfast, those who live in the areas surrounding Local Government Districts (collectively known as the Belfast Metropolitan Area[1] [BMA]), as well as those work in Belfast but live elsewhere. Data was collected between March and May 2013 from the following sample sets:

Sample 1: Residents of Belfast City Council
The survey was conducted with 786 people across 38 wards in the Belfast Local Government District area. The sample was selected based upon analysis of the wards most affected by population increase or decline between 2001 and 2011 (*source*: Census, 2001; Census, 2011). Wards that have experienced a significant population increase or decrease (+/-10% or more) had a higher proportion of the population selected for interview. The distribution of the remaining samples were evenly spread, representative of the population north, south, east and west of the city.

Sample 2: Residents in the wider Belfast Metropolitan Area
The survey was conducted with 753 people living within the BMA (excluding the Belfast Local Government District).

Sample 3: People who work in Belfast but live elsewhere
This survey was conducted with 323 people who work in Belfast but who live outside the BLGD area. The survey was conducted on-street in the city centre and main thoroughfares, at Park and Ride facilities as well as bus-stops, bus stations and train stations. The purpose of this survey was to capture the views of commuters, who have chosen to live outside the city even though they travel in for employment.

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[1] Belfast Metropolitan Area comprises of the Belfast City, Carrickfergus Borough, Castlereagh Borough, Lisburn City, Newtownabbey Borough, and North Down Borough Council areas.

Market research to explore people's choices to live or move from the Belfast City Council Area – August 2013

Image 1.1: Belfast Metropolitan Area
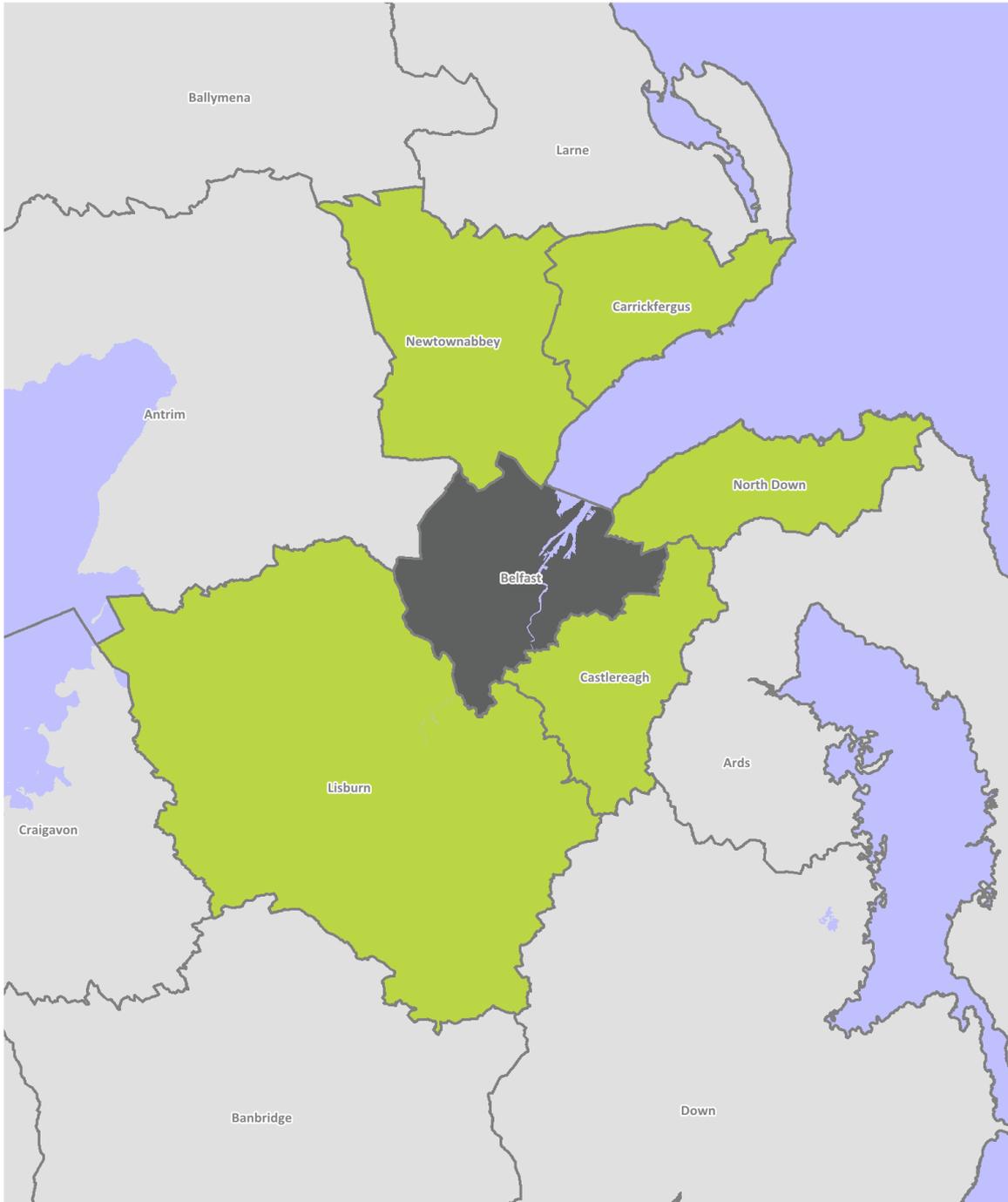
Population research study area

Key

⬛ (dark grey)	Belfast Local Government District Area
🟩 (green)	Belfast Metropolitan Area (excluding Belfast Local Government District Area)
⬜ (light grey)	Northern Ireland

Key findings from the review

Population trends

According to the 2011 Census, an estimated 280,962 people live in the Belfast Local Government District area, while over 670,700 live in the wider Belfast Metropolitan Area.

The total population of BLGD area has not significantly changed between 1991 and 2011 (increase of only 0.6%). However, between 1991 and 2001, total population fell by 0.7% to 277,392 in 2001 before rising again by 1.3% to 280,962 in 2011 (*see* Table 1.1). In contrast to Northern Ireland, the population change over the same time period (i.e. from 1991 to 2011) increased by 15.8%.

All of the surrounding Councils in the BMA have also had a much greater change in population, most notable being Lisburn and Carrickfergus with a 20.8% and 19.4% rise respectively.

Table 1.1: Change in population numbers in the Belfast Metropolitan Area between 1991 and 2011

Area	1991	2001	% change since 1991	2011	% change since 2001	% change since 1991
Belfast	279,237	277,392	-0.7	280,962	1.3	0.6
Castlereagh	60,799	66,487	9.4	67,242	1.1	10.6
Lisburn	99,458	108,690	9.3	120,165	10.6	20.8
Newtownabbey	74,035	79,996	8.1	85,139	6.4	15.0
North Down	71,832	76,320	13.1	78,078	6.6	8.7
Carrickfergus	32,750	37,659	15.0	39,114	3.9	19.4
Belfast Metropolitan Area	**618,111**	**646,544**	**4.6**	**670,700**	**3.7**	**8.5**
Northern Ireland	**1,577,836**	**1,685,267**	**6.8**	**1,810,863**	**7.5**	**15.8**

Source: 1991, 2001, 2011 Census

Tables 1.2 and 1.3 show the difference in the number of households, and the change in household size between 2001 and 2011. As these tables show, while Belfast Local Government District area had a 0.9% increase in the number of households, this is considerably lower than the Northern Ireland figure of 12.2% as well as a number of other councils within the BMA.

Market research to explore people's choices to live or move from the Belfast City Council Area – August 2013

Table 1.2: Change in number of households in Belfast Metropolitan Area between 2001 and 2011

Area	2001	2011	% change since 2001
Belfast	119,553	120,595	0.9
Castlereagh	27,518	27,733	0.8
Lisburn	41,140	45,723	11.1
Newtownabbey	32,137	33,971	5.7
North Down	32,208	33,255	8.7
Carrickfergus	14,785	16,200	9.6
Belfast Metropolitan Area	**267,341**	**277,477**	**3.8**
Northern Ireland	**626,718**	**703,275**	**12.2**

In addition, in 2011 Belfast LGD had a relatively small household size (2.29) in 2011, especially when compared with Northern Ireland (2.54) and the other council areas within the BMA. It should be noted that across all areas in Northern Ireland there has been a fall in household size since 2001.

Table 1.3: Change in average household size in Belfast Metropolitan Area between 2001 and 2011

Area	2001	2011	% change since 2001
Belfast	2.38	2.29	-3.8
Castlereagh	2.44	2.40	-1.6
Lisburn	2.67	2.59	-3.0
Newtownabbey	2.51	2.45	-2.4
North Down	2.41	2.33	-3.3
Carrickfergus	2.52	2.39	-5.2
Northern Ireland	**2.65**	**2.54**	**-4.2**

Push and pull factors

The review examined a number of drivers (i.e. push and pull factors) which influence where a person decides to live. Traditionally, the main components of population changes are[2]:

▪ Natural change (difference between births and deaths);
▪ Internal migration (migration within Northern Ireland);
▪ External migration (migration from Britain, the Republic of Ireland and the rest of the world).

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[2] Northern Ireland Housing Executive (2011) *The Belfast Metropolitan Housing Market Area: A local housing system analysis,* NIHE.

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The following table summarises the push and pull factors which may impact on population change:

Table 1.4: Push and Pull factors

Type	Push	Pull
Physical	Noise pollution	Proximity to amenities
	House or garden size	Public transport links
	Traffic congestion	Access to outdoor environment
		Access to outdoor activities
Social/Economic	Perception of safe environment	Family and friends
	Affordable housing	Community spirit
	Affordable cost of living	Long term residency
		Opportunities of community engagement
		School provision
		Proximity to employment
		Job opportunities

Key findings from the attitudinal survey

All respondents were asked to rate the extent to which a series of factors have influenced their choice of current residence, using a scale of 1 to 5 (where 1 is no influence and 5 is significant influence), in order to assess which factors influenced where a person chooses to live.

In order to gain an insight into the key push and pull factors affecting peoples' decision to reside, findings have been summarised within three categories of influence (physical, social & cultural, and economic). The summary commences with an overview of the 'influencing factor average scores'.

Table 1.5: Influencing factors average scores by Belfast Local Government District area and the Belfast Metropolitan Area

Influencer	Type	BLGD	BMA
Proximity to amenities	Physical	4.09	3.75
Perception of safe environment	Social	3.91	4.21
Public transport links	Physical	3.90	3.66
Family and friends	Social	3.79	3.74
Community spirit	Social	3.53	3.43
Long term residency	Social	3.62	3.18
Access to outdoor environment	Physical	3.13	3.49
Opportunities of community engagement	Social	3.07	3.03
Access to outdoor activities	Physical	3.06	3.31
House or garden size	Physical	2.92	3.11
School provision	Economic	2.88	2.85
Proximity to employment	Economic	2.84	2.98
Noise pollution	Physical	2.77	3.11
Affordable housing	Economic	2.77	2.93
Traffic congestion	Physical	2.65	2.92
Affordable cost of living	Economic	2.63	2.68
Job opportunities	Economic	2.33	2.35

Physical factors

Those who live in the Belfast Local Government District area are more likely to indicate that they are greater influenced by *proximity to amenities* (BLGD 4.09; BMA: 3.75), a *good*

public transport network (3.90; 3.66) and the *long-term residency* within an area (3.62; 3.18) compared to those who live in the BMA.

Those who reside in the Belfast Metropolitan Area indicated that they are more influenced by how *safe the local environment* is (BMA: 4.21; BLGD: 3.91), a *larger house or garden* (3.11; 2.92), a*ccess to outdoor activities* (3.31; 3.06); and a *good outdoor environment* (3.49; 3.13) than Belfast residents.

Younger respondents who live in BMA are more strongly influenced by proximity to amenities (average score 3.84 for 18 to 35 year olds compared to average score 3.69 for those aged 66+) and the public transport network (average score 3.70 for 18 to 35 year olds compared to average score 3.64 for those aged 66+). Size of house/garden (3.24), access to outdoor activities (3.4) and a good outdoor environment (3.58) were rated most highly by those aged between 36 and 65. ABC1 respondents are more likely to indicate that they are influenced by the size of house/garden (3.33) and satisfaction with the external environment (3.68) compared to those from C2DE groups (2.92 and 3.32 respectively).

Suitability of housing has a moderate influence on why respondents from BMA do not live in the Belfast area (28% cited it as a factor which influences why they do not live in Belfast). Younger respondents (28%) and those from ABC1 groups[3] (29%) are more likely to highlight *housing quality* as an influence on why they do not live in Belfast.

Approximately a quarter of BMA respondents (24%) indicated that they are influenced not to live in the Belfast LGD due to *availability of parks and green space*, while almost two fifths of BMA respondents (38%) stated that *traffic congestion* has an influence on why they do not live in Belfast.

Social and cultural factors

Proximity to family/friends appears to have an equal level of influence on both those who live in the BMA (3.79) and BLGD (3.74). Respondents from BLGD area are on average more likely to indicate that they grew up in the area (3.62) than those who live in the BMA (3.18). Also notable is that respondents from BMA are more likely to indicate that they are influenced by *feeling safe* (4.21) than those in BLGD (3.91).

Economic factors

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[3] Socio-economic group definitions: A – 2-3 per cent of the population, professional people, very senior managers in business or commerce or top level civil servants; B – 12-13 per cent of the population, middle management executives in large organisations, with appropriate qualifications, principle officers in local government and civil service, top management or owners of small business concerns, educational and service establishments; C1 – 31 to 33 per cent of the population, junior management, owners of small establishments, and all others in non-manual positions. Jobs in this group have very varied responsibilities and educational requirements; C2 – 16 to18 per cent of the population, all skilled manual workers and those manual workers with responsibility for other people. D – 24 per cent of the population. All semi and unskilled manual workers, apprentices and trainees to skilled workers. E – 11 per cent of population. All those entirely dependent on the state long-term through sickness, unemployment, or other reason. Those unemployed for a period exceeding six months. Casual workers and those without a regular income.

Findings reveal little difference in respondents' viewpoint based on where they currently live. On average, respondents rated the following factors similarly in terms of influence:

▪ Access to better jobs (BLGD: 2.33; BMA: 2.35);
▪ Better choice of schools (BLGD: 2.88; BMA: 2.85);
▪ More affordable housing (BLGD: 2.77; BMA: 2.93);
▪ Cost of living (BLGD: 2.63; BMA: 2.68).

Of the BMA respondents and commuters, 30% and 45% respectively indicated that availability of *affordable quality housing* has a significant influence on why they do not live in Belfast City Council. Whilst younger respondents and those from ABC1 groups are more likely to rate *affordable housing* as a reason why they do not live in Belfast.

Table 1.6: Influencing factors average scores by area

Influencer	Type	Belfast	North	South	East	West	Shankill
Proximity to amenities	Physical	4.09	4.11	4.11	4.19	4.15	3.63
Perception of safe environment	Social	3.91	4.01	3.95	3.89	3.96	3.60
Public transport links	Physical	3.90	3.98	3.83	3.94	4.06	3.43
Family and friends	Social	3.79	4.46	3.43	3.44	4.09	3.78
Community spirit	Social	3.53	3.73	3.61	3.24	3.90	2.98
Long term residency	Social	3.62	4.32	3.26	3.03	4.10	3.88
Access to outdoor environment	Physical	3.13	3.06	3.39	3.10	3.27	2.42
Opportunities of community engagement	Social	3.07	3.39	3.19	2.78	3.42	2.36
Access to outdoor activities	Physical	3.06	2.98	3.31	3.01	3.20	2.47
House or garden size	Physical	2.92	2.88	3.01	2.71	3.15	2.81
School provision	Economic	2.88	3.25	2.74	2.66	3.29	2.27
Proximity to employment	Economic	2.84	2.94	3.04	2.57	3.03	2.53
Noise pollution	Physical	2.77	2.77	2.81	2.62	3.05	2.51
Affordable housing	Economic	2.77	3.17	2.74	2.70	2.79	2.36
Traffic congestion	Physical	2.65	2.68	2.74	2.45	2.88	2.43
Affordable cost of living	Economic	2.63	3.02	2.68	2.56	2.63	2.12
Job opportunities	Economic	2.33	2.56	2.66	2.04	2.32	2.01

Looking ahead

▪ 85% of respondents who currently live in Belfast LGD envisaged that they will continue to live there in five years time. Respondents from south Belfast (78%) are less likely to agree that they will be living in Belfast in five years time;
▪ Those who live in wards which have experienced more than 10% decline are more inclined to predict that they will be living in Belfast compared to those from wards which have seen a population increase (88% and 82% respectively);
▪ Older respondents and those from C2DE groups are more likely to indicate that they will remain living in Belfast City Council area.

Profile of those leaving Belfast

Findings from the survey indicate that those who previously lived in Belfast Local Government District are primarily in the middle to older age bracket (between 36 and 66+ years) and are more likely to be from ABC1 social groups. Such respondents are also more likely to reside in the Castlereagh, North Down or Lisburn Local Government Districts. Overall, the majority of such respondents tended to have lived in BLGD over twenty years ago.

Profile of those who may move to Belfast City Council area

14% of all BMA residents surveyed indicated that they envisage living in Belfast in five years time. Almost one quarter of such respondents were in the younger age category (18 to 35 years) and were from ABC1 groups. Such respondents are also less likely to indicate that they grew up in the BMA than those from the same area who have no intention to move to BLGD area. Physical factors, such as *proximity to amenities* and *better public transport network*, may play an influence on respondents' inclination to move to the city, as 69% and 66% BMA residents cited these factors as influential to their current choice of residence.

Of the Belfast LGD respondents, 85% envisaged that they would continue living in Belfast in five years time. Findings revealed little difference based on age or social class. However, those who live in South Belfast and in areas which have witnessed population increase are less likely to believe that they will be living in Belfast in the future.

Analysis by population shift across wards in Belfast

Analysis by population shift provides some insight into why certain areas (i.e. Andersonstown, Upper Springfield and Woodvale) have experienced a population decline of more than 10% in the last decade. Respondents from these wards are less likely to state that they are influenced by physical factors such as proximity to amenities (67%), good public transport network (64%) and access to a good outdoor environment (34%) – compared to 91%, 83% and 41% (respectively) of those who reside in areas of population increase.

Analysis of the social & cultural factors provides interesting insight on the population decline. Respondents from the Andersonstown, Upper Springfield and Woodvale wards are less likely to state that they are influenced by a *sense of community spirit* (51%), *opportunities to get involved in the local community* (31%) and by *feeling safe* (62%) compared to those who live in wards which have experienced a population increase (63%, 49%, 75% respectively). The findings suggest that population may be retained in these areas by addressing concerns in relation to *safety* and providing *more effective opportunities for community engagement*.

What factors have contributed to the population decline in Belfast?

Further analysis of push and pull factors provides some insight into the reasons why respondents may have moved from the Belfast LGD area.

▪ **house size and type** appears to have a strong influence on why residents have moved. The survey revealed that Belfast residents (62%) are much more likely to live in terraced housing than their BMA counterparts (33%). Those from the BMA were also more likely to indicate that they have been influenced to live in their current residence due to the *size of the house or garden* (46% compared to 37% BLGD residents) House size and type appears to be a particular influence for younger

respondents in both Belfast LGD and the BMA; with both indicating that suitability of quality housing may play a role in influencing them to move from their current residence;

▪ economic factors, such as **affordability of housing and cost of living,** also appear to be preventing people from moving to the city. 30% of BMA residents and 45% commuters stated that availability of affordable housing has an influence on why they do not live in the Belfast LGD. Such findings reiterate feedback from the Council's 2007 *Residents Survey,* which indicated that Belfast respondents were dissatisfied with the *lack of affordable housing* (47%) and *cost of living* (44%) in the area;

▪ exploration of social & cultural factors also provides an indication of why respondents may be moving from Belfast LGD. BMA residents are much more likely to report that they have been influenced to live in their current residence in order to gain a **sense of community spirit and become involved in the local community**. Findings suggest that respondents may be more encouraged to move or remain in Belfast if they felt a better engagement with the community;

▪ the **influence of crime and anti-social behaviour** was also highlighted within the survey. BMA respondents were more likely to indicate that they are influenced by f*eeling safe in their neighbourhood* compared to Belfast LGD residents. Almost half of BMA residents indicated that they do not live in BLGD due to *crime and anti-social behaviour*; a sentiment which was specifically highlighted by younger respondents. Similarly, younger respondents who currently live in Belfast were most likely to indicate that they may be influenced to move from the area as a result of crime and anti-social behaviour (37% of 18 to 35 year olds cited this as a potential factor for moving from the BLGD area compared to 11% of those aged 66+);

▪ survey findings also revealed that the **political situation in Belfast** may be preventing people from moving to Belfast. 42% of those surveyed in the BMA indicated that the political situation has an influence on why they do not currently live in Belfast. In addition, over a quarter of Belfast residents (27%) indicated that they want to move from the city due to the *political climate*.

Key recommendations to retain and increase population in Belfast

Overall, findings suggest that there may be merit in targeting the younger generation (aged 18 to 35 years) who currently reside in the Belfast LGD area and surrounding regions. This group are most likely to state that they would be willing to move to the city, while Belfast residents aged 18 to 35 are also more likely to report that they may move from the city in five years time. The younger generation in Belfast seem to be much more likely to move from the city due to crime and antisocial behaviour and the political situation in Belfast. Contrastingly, older Belfast residents appear less concerned with such political and social factors.

Comparison of respondents' feedback in relation to push and pull factors provides insight into ways in which Belfast City Council could help combat this decline:

1. address concerns in relation to *crime and antisocial behaviour* in Belfast, with the aim to improve residents' sense of safety and reduce negative perceptions of crime in Belfast;
2. continue to *enhance and regenerate open spaces* to ensure greater availability/access to green space and improved opportunities for physical activity;
3. where possible, support, advocate and adopt plans for the development of a*ffordable housing*;
4. continue to publicise and actively promote positive aspects of Belfast and city living which are deemed to be attractive, such as *proximity to shops, entertainment and other local amenities*; access to *job opportunities/employment*; and the *reliability and affordability of the public transport network*.
5. encourage *community spirit and support opportunities* for community engagement, particularly in areas of population decline;
6. utilise the research to inform the *ambitions and delivery of the Belfast City Masterplan*.

Introduction

Belfast City Council commissioned Perceptive Insight to conduct research to explore the factors that are affecting people's decisions to live or move from the Belfast City Council Area, through an analysis of potential push and pull factors.

The research addressed the following key questions:

- what factors have contributed to people leaving Belfast and specific areas within the city?
- what is the profile of those people leaving the city (and which areas) and what made them relocate?
- what is the profile of those people moving into the city (and which areas) and what made them move to Belfast?
- what practical policy interventions need to be taken to retain and increase population in Belfast? Specifically those for Belfast City Council.

The study encompassed two key components:

(1) an attitudinal study to investigate the current profile of current and past residents of Belfast City Council, those who live in the areas surrounding BMA, and those work in Belfast but live elsewhere;
(2) a review looking at push and pull factors that have impacted on peoples choices about where they have chosen to live and effective policy interventions. The review will also involve previous pieces of research conducted by organisations.

Findings from the research will be used by policy makers to identify potential ways in which they can increase population in Belfast, particularly focusing on trying to attract those people back who have moved out of Belfast but not returned.

Review background

The aim of the review was to set the context for the research findings and to address the following:

- what policy initiatives have been developed to boost physical regeneration and strategically tackle the population decline in Belfast City Council;
- what are the population trends, especially the shift in population from Belfast City Centre to the surrounding metropolitan areas;
- what are the *push* and *pull* factors;
- what previous research have been carried out illustrating resident satisfaction with the Belfast City Council area and recommendations for improvement.

In particular, the review considered the push/pull factors that have impacted people's choices about where they have chosen to live and set this within the policy context for Belfast. Relevant documents referenced include:

- People and Place - A strategy for Neighbourhood Renewal (2003);
- People and Place - A strategy for Neighbourhood Renewal: the mid-term review (2011);
- Regional Development Strategy for Northern Ireland 2025;
- Belfast Metropolitan Area Plan (BMAP) 2015: Housing Need Assessment;
- Belfast Masterplan 2004-2020.

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Policy context

In the past decade, a number of significant policy initiatives in relation to development, land use planning and transportation, have been developed in Northern Ireland. The most influential of these include the Regional Spatial Framework – *Shaping Our Future, the Regional Development Strategy for Northern Ireland (RDS) 2025)[4]*, and a second transportation policy, which ran concurrently, the Regional Transport Strategy (RTS)[5]. On a metropolitan basis, these initiatives have been mirrored by the development of the Belfast Metropolitan Area Plan[6] (BMAP) and the Belfast Metropolitan Transport Plan[7].

In order to provide a better understanding of the policies developed that contribute (directly or indirectly) to the alleviation of population decline, this chapter provides an overview of the policy initiatives adopted in the last ten years. Demonstrating a commitment to physical regeneration, targeting deprivation and improving housing provision in Belfast city centre, this section begins with an examination of the current policy context in relation to the regeneration of Northern Ireland. Policy analysis will be conducted at a regional level, with an overview of the aims and objectives of the Regional Development Strategy and the Investment Strategy for Northern Ireland. It is secondly examined at a metropolitan level[8], through an exploration of the Belfast Metropolitan Area Plan. This section will also review further policy reforms in relation to physical regeneration, those that aim to increase the city population, and steps taken to target deprivation, enhance tourism and increase employment opportunities for Belfast.

Finally, a number of key strategies which have a specific focus on community safety, culture, housing and transport will be reviewed.

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[4] Department of Regional Development (DRD) (2001) *Shaping Our Future – Regional Development Strategy for Northern Ireland 2025.* Belfast: DRD.
[5] DRD (2002) *Proposed Regional Transportation Strategy for Northern Ireland.* Belfast: DRD.
[6] Department of Environment (DOE) (2001) *Belfast Metropolitan Area Plan 2015.* Issues Paper. Belfast: DOE.
[7] DRD (2003) *Belfast Metropolitan Transport Plan, Working Conference Papers.* Belfast: DRD.
[8] Having reviewed policy documents for Northern Ireland as a whole, this document then turns to policy reforms for the BLGD area. 'Metropolitan level' refers to Belfast City.

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Regional policies

Regional Development Strategy (RDS) for Northern Ireland[9]

The current regional planning framework in Northern Ireland is provided by the Regional Development Strategy (DRD, 2001), a statutory plan endorsed by the Northern Ireland Assembly. This Strategy acts as the overarching framework for development plans in Northern Ireland and guides physical development within the Region up to 2025. Initiated following an extensive public consultation exercise which involved 500 community and interest groups (McEldowney and Sterrett, 2001)[10], the Strategy is shaped by the following vision:

"To create an outward-looking, dynamic and liveable region with a strong sense of its place in the wider world; a region of opportunity where people enjoy living and working and a healthy environment which enhances the quality of people's lives and where diversity is a source of strength rather than division."

The Regional Development Strategy was developed in light of the identification of various trends driving change within Northern Ireland. These included:

- a regional population growth rate twice the current UK rate and exceeding that of the Republic of Ireland, making Northern Ireland one of the fastest growing regions in Europe;
- enhancing connectivity and development that improves the health and wellbeing of communities;
- a predicted increase of 160,000 new households by 2015, with over 60 percent of households comprising one and two persons[11];
- a regional need for up to 250,000 additional dwellings by 2025;
- the need to create an additional 100,000 jobs to cater for the expanded population.

In essence, the broad aim of the spatial strategy is to guide future development in order to promote a balanced and equitable pattern of sustainable development across the region. It provides an overarching strategic framework for development plans and provides a basis for (1) the strengthening of the regional economy, (2) reduction of social development; and (3) the sustainable planning of future development.

Whilst the RDS outlines plans for the entire Province, it plays a crucial role in setting out a broad strategy for the Belfast Metropolitan Area (BMA), which consequently set the foundations for the Belfast Metropolitan Area Plan (BMAP). It should be noted that the Belfast Metropolitan Area (BMA) covers the administrative districts of Belfast City,

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[9] Department of Regional Development (DRD) (2001) *Shaping Our Future – Regional Development Strategy for Northern Ireland 2025.* Belfast: DRD.

[10] McEldowney, M. and Sterrett, K. (2001) Shaping a Regional Vision: the Case of Northern Ireland, *Local Economy,* 16 (1), 38 – 49.

[11] Census (2011): number of households 703, 275.

perceptive insight

Castlereagh Borough, Carrickfergus Borough, Lisburn Borough, Newtownabbey Borough and North Down Borough.

The BMA is the largest urban centre in the region, with an estimated population of 671,599 (Census 2011 population statistics), which encompasses 37% of the entire population of Northern Ireland. Strategic objectives specific to the BMA are outlined below:

▪ ensure a reinforced role for Belfast as regional capital and focus of administration, commerce specialised services and cultural amenities;
▪ create a stronger role for Belfast as an international city;
▪ develop an important complementary role for the boroughs of North Down, Carrickfergus and Lisburn, maintaining their distinctive town identities, and for the suburban boroughs of Castlereagh and Newtownabbey;
▪ ensure a revitalised metropolitan area maintaining a polycentric pattern focused on existing local centres and with a strong emphasis on continuing physical renewal, within the existing urban area, to support existing communities;
▪ enable the regeneration of areas of social need;
▪ ensure a compact metropolitan area with a protected environmental setting and an enhanced quality of urban environment;
▪ reinforced better integration between land use and transportation; and
▪ develop a modern integrated and inclusive transport system.

McEldowney, Scott & Smyth (2003)[12] recognise that the main thrust of the Regional Development Strategy in relation to the Belfast Metropolitan Area, is to ensure a balance of concentration and decentralisation. Therefore, the development of the BMA is based on: encouraging the revitalisation of the BMA; developing the main towns of Antrim, Downpatrick, Larne, Newtownards, Banbridge and Craigavon as 'counter magnets' to the Metropolitan area; and accommodating 'overspill' growth by the expansion of seven nearby towns, including Ballyclare, Ballynahinch, Carryduff, Crumlin, Dromore and Moira.

In order to achieve the balance of economic development and growth between the wider Belfast area and the rest of Northern Ireland, the RDS 2001 – 2025 included a *Spatial Development Strategy* (SDS) which focused on the following three areas:

▪ the Belfast Metropolitan Area (BMA), which is identified as the region's engine of growth and where the aim is to ensure it can compete with European cities.
▪ Londonderry Urban Area, which is described as the economic hub of the North West.
▪ rural Northern Ireland, where the priority is to promote decentralised growth through focusing development on a network of main and local hubs. This was to be facilitated by an upgrade of transport corridors.

(information sourced from the NIHE (2011) local housing system analysis)[13]

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[12] McEldowney, M., Scott, M., and Smyth, A (2003) Integrating land-use planning and transportation – policy formulation in the Belfast Metropolitan Area, *Irish Geography*, 36 (2), 112 – 126.
[13] Northern Ireland Housing Executive (2011) *The Belfast Metropolitan Housing Market Area: A local housing system analysis*, NIHE.

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In total, the RDS 2001-2025 contained 43 long-term strategic planning guidelines to improve the quality of the urban and rural environment within Northern Ireland and the Belfast Metropolitan Area.

Consultative RDS 2011-25: 10 year review[14]

The RDS underwent a review in 2011, resulting in a reduction in the number of strategic guidelines from 43 to 27. Despite streamlining the number of strategies, the 10 year review continued to stress the importance of developing the principal cities of Derry / Londonderry, with specific focus on Belfast City and the BMA as the drivers of regional economic growth. In particular, the proposed strategic guidance reiterates the need to:

▪ increase the population of Belfast City and enhance its role as the regional centre. The drive to increase the scale and mix of housing in Belfast is linked to rebalancing the economy and the need for a thriving metropolitan area that can compete internationally as a place to locate private business and attract inward investment and high value jobs;

▪ promote economic development at key urban locations throughout the BMA and ensure sufficient land is available for jobs. There is reference to the expansion of the employment and commercial base of Lisburn. There is also reference to the renewal of Bangor and Carrickfergus town centres, both of which have significant housing catchment areas that offer the potential to extend local retail base and to widen their economic and employment base;

▪ manage the movement of people and goods within the BMA through improvements in transport infrastructure, including the Belfast rapid transit system, alongside better alignment between land use and improvements to public transport.

▪ protect and enhance the quality of the setting of the BMA and its environmental assets, which is linked not only to conserving and protecting 'natural' assets in rural areas, but also the need for sustained efforts to regenerate deprived communities and to ensure citizens benefit from wealth creation;

▪ promote population growth and economic development in Newtownards (and the other 8 sub-regional centres) through the provision of additional housing in these areas, although the consultation document poses a question whether Newtownards, which has been suggested as a sub-regional centre, should be included in any new area plans for the metropolitan area;

▪ identify and consolidate the roles and functions of settlements within each cluster, including the provision of housing in urban centres such as Banbridge and Antrim to limit further decentralisation and support regeneration.

(source: NIHE (2011) local housing system analysis)[15]

Investment Strategy for Northern Ireland[16]

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[14] DRD (2011) *Shaping Our Future: Regional Development Strategy (RDS) 2025 Consultation 10 year Review*
[15] Northern Ireland Housing Executive (2011) *The Belfast Metropolitan Housing Market Area: A local housing system analysis,* NIHE.
[16] Northern Ireland Executive *Investment Strategy for Northern Ireland 2008 − 2018, Building a Better Future.*

perceptive insight

The Government's commitment to regeneration and redevelopment is evidenced in the Investment Strategy for Northern Ireland. This strategy outlined an £18 billion investment programme for the period to 2018, which included regeneration, social housing, welfare reform and modernisation, alongside development of networks including roads, public transport, gateways and telecoms. Whilst investment focused on a range of matters, the areas identified to gain most investment were roads, housing and regeneration, schools, health and environment.

Information within this literature review specifically concentrates on policy strategies in relation to economic development, regeneration and tackling disadvantage.

Belfast Metropolitan Area Plan (BMAP) 2015[17]

The key planning document for the BMA, developed in the framework of the Regional Development Strategy, is the Belfast Metropolitan Area Plan (BMAP). The following section explores the purpose and objectives of this initiative in more detail.

BMAP aims to provide a planning framework which is in general conformity with the Regional Development Strategy in facilitating sustainable growth and a high quality of development in the Belfast Metropolitan Area. In simple terms, BMAP was developed by DOE with the purpose of guiding the future development of the BMA for the subsequent 15 years and in doing so, giving effect to the RDS 2025. The long-standing aim for BMAP is further elaborated upon within the *Belfast Metropolitan Area Plan 2015: Issues Paper* and is outlined below:

"[to] *secure a strong and vibrant metropolitan area to ensure the economic well being of all of Northern Ireland. The Belfast Metropolitan Area Plan will also aim to secure the long-term status of the Belfast Metropolitan Area as one of Europe's most successful metropolitan regions."*

BMAP has the following specific functions:

▪ provide an essential framework for guiding investment by public, private and community sectors and help harness additional resources through collaboration in tackling problems;
▪ Provide confidence and context for those wishing to develop and those affected by development proposals;
▪ establish a framework for positive co-ordination of public policies in joined-up government at both regional and local levels;
▪ provide an effective land supply phased and allocated to meet the full range of needs to support the life of the local community and social and economic progress;
▪ establish a process for involvement and ownership by local communities wishing to influence the future development of their districts within the overall metropolitan area; and
▪ interpret at a local level, planning policies set out in Planning Policy Statements.

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[17] DOE (2001) *Belfast Metropolitan Area Plan 2015.* Issues Paper. Belfast: DOE.

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In addition, guiding principles for BMAP aim to ensure the (1) promotion of equality of opportunity and social progress for the benefit of the whole community; (2) facilitation of sustainable economic growth; (3) protection of the environment; and (4) promotion of an integrated approach between transportation and land-use. Furthermore, the accommodation of future housing growth was recognised as a key issue in the formulation of BMAP, and was central to the public consultation process which informed the plan (McEldowney et al. 2003)[18].

Regeneration policy measures

Having reviewed the planning framework on a regional and metropolitan level, this paper now turns to policy reforms which aim to tackle deprivation and enhance regeneration. Beginning with the Masterplan for Belfast, this section recognises a policy initiative which encompassed a series of action plans within a singular strategic framework.

Belfast: The Masterplan 2004 – 2020[19]

The Belfast Masterplan was commissioned by Belfast City Council in 2003 following a continuing population decline which spanned ten years and resulted in Belfast lagging behind the growth in other district council areas. Following careful analysis of the social, economic and physical needs of the city, the Masterplan provided the Council with a framework in which they could begin the revival of Belfast for the subsequent 16 years.

In essence, the overarching aim of the Masterplan was to stem the decline of the region's capital city, as well as stimulating and focusing growth within the urban area. This involved the development of a series of individual actions, which in conjunction acted as a single, comprehensive strategy framework for the city of Belfast. Actions were encompassed within three priority types: (1) priorities for change; (2) spatial priorities; and (3) organisational priorities. The actions which fell within these priorities are summarised below (it should be noted that this section summarises some of the key action plans included with the Belfast Masterplan, however this is not an exhaustive list of all proposed actions):

Priorities for Change
- **Increase the city population**
  - ensure a population increase of 1.8% per year, from 277,000 in 2004 to 400,000 in 2025[20];
  - promote a sustainable, balanced, compact and dense model of population development, with higher densities of living and working in the city, residential use within the Titanic Quarter, and use of strategic city centre brownfield and derelict sites;
- **Ensure development of the city centre**

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[18] McEldowney, M., Scott, M., and Smyth, A (2003) Integrating land-use planning and transportation – policy formulation in the Belfast Metropolitan Area, *Irish Geography*, 36 (2), 112 – 126.
[19] Belfast City Council (2004) *Belfast: the Masterplan 2004 – 2020*
[20] Census (2011) current Belfast city population - 280, 962

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- - raise awareness and promote the city centre as a regional asset;
  - promote high quality office provision, increase diversity of housing tenure, and better quality open space;
  - enhance the wider retail offering of the city;
  - diversify the economic and social mix of the city centre;
- **Develop new industries**
  - commission a comprehensive strategy for the knowledge-based industries in integrate business, urban planning and academic policies;
- **Develop land for employment**
  - create new employment zones around the city centre and middle-city to accommodate manufacturing and other traditional industries;
  - increase the supply of land for business and employment opportunities through direct City Council intervention;
  - work with the private sector, local enterprise agencies and other components of the social economy to identify ways of meeting the needs of local businesses;
  - ensure planning policies that emerge from the BMAP and other processes provide sufficient priority for local and smaller businesses;
- **Simplify city governance**

Spatial priorities

- **Energised core**
  - improve and widen the cultural, residential, commercial and retail offering;
  - redevelop city quarters with strong urban design frameworks;
  - introduce high quality architecture on landmark sites.
- **Neighbourhood renewal**
  - implementation of a co-ordinated community approach to neighbourhood renewal and examine opportunities for economic, social, physical and environmental regeneration;
- **Released environmental assets**
  - enhance the city's most prominent natural assets in order to improve accessibility, increase activity and contribute to the redevelopment of the areas;
- **Enhance the presentation of the city**
  - consider the physical enhancement of specific sites, particularly those which are visible to visitors to the city. These include major road corridors (M1, Westlink, M2 and M3); major road junctions (Grosvenor Road, York St / Nelson St, Bridge End); bus and railway stations; car parks throughout the city centre; City airport and surroundings; and the shoreline of the Belfast Lough.

It should be noted that the Masterplan is currently under review to ensure its relevance in the current economic climate.

People and Place – A strategy for Neighbourhood Renewal (2003)[21]

In terms of regeneration and tackling disadvantage, the 2003 *People and Place – A strategy for Neighbourhood Renewal* is instrumental. This long term (7–10 year) strategy targets

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[21] Department for Social Development (DSD) (2003) *People and Place: A Strategy for Neighbourhood Renewal*.

those communities throughout Northern Ireland suffering the highest levels of deprivation. Neighbourhood Renewal is a cross government strategy and aims to bring together the work of all Government Departments in partnership with local people to tackle disadvantage and deprivation in all aspects of everyday life. Specific objectives of this strategy include:

- **Community renewal** - to develop confident communities that are able and committed to improving the quality of life in the most deprived neighbourhoods;
- **Economic renewal** - to develop economic activity in the most deprived neighbourhoods and connect them to the wider urban economy;
- **Social renewal** - to improve social conditions for the people who live in the most deprived neighbourhoods through better coordinated public services and the creation of safer environments;
- **Physical renewal** - to help create attractive, safe, sustainable environments in the most deprived neighbourhoods.

Neighbourhood Renewal Partnerships have been established in the most deprived 10% of wards across Northern Ireland were identified using the Noble Multiple Deprivation Measure. Following extensive consultation, this resulted in a total of 36 areas, and a population of approximately 280,000 (one person in 6 in Northern Ireland), being targeted for intervention. The areas include:

- 15 in Belfast (including five in North Belfast);
- 6 in the North West (including 4 in the city of Derry/Londonderry); and
- 15 in other towns and cities across Northern Ireland.

Neighbourhood Partnerships have been established in each Neighbourhood Renewal Area as a vehicle for local planning and implementation. Each Neighbourhood Renewal Partnership includes representatives of key political, statutory, voluntary, community and private sector stakeholders. Together, they have developed long term visions and action plans designed to improve the quality of life for those living in the area.

In order to measure the effectiveness of the Neighbourhood Renewal Strategy, the Department indicated that a mid-term review should be carried out during 2011. Findings from the review can be found latterly in this paper (within Chapter 5 which summarises the impact of some policy reforms and evaluates findings from previous research publications).

The remainder of this chapter focuses on policy evaluations focused on physical regeneration of Belfast City Centre. Such strategies demonstrate the level of commitment by policy makers to enhance Belfast as a vibrant, modern city.

Belfast State of the City[22]

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[22] Belfast City Council http://www.belfastcity.gov.uk/stateofthecity/research.asp

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Belfast City Council set up the State of the City initiative in 2004. Its aim is to help organisations to work together on the development and regeneration issues that face the city.

State of the City has been shaped by the expertise of those involved to-date, including leading local and international academics and practitioners in the fields of physical, economic, social and cultural development.

It has helped the Council to build up a picture of the challenges and opportunities facing Belfast. It has also contributed much to our understanding of how Belfast works, plus the debate on how the city should continue to be developed.

Regeneration programmes and measures[23]

Over the past decade, Belfast has experienced record levels of investment and growth. Central to this growth is the physical regeneration of many sites across Belfast City Centre. Recent developments include the Titanic quarter, which is one of Europe's largest waterfront regeneration developments and is expected to create significant tourism and employment income for Belfast. A further successful example of physical regeneration is the Gasworks Business Park. This previously derelict and heavily polluted city centre Brownfield site has been turned into a modern business park in recent years, generating income for the city. Further physical regeneration projects are planned to enhance Belfast city. These include:

▪ Giant's Park: Transforming around 220 acres of land at the Dargan Road Landfill site on the North foreshore into a landmark public park for the city.
▪ Lagan Corridor Project: This project aimed to rejuvenate the River Lagan, by re-opening around 17 kilometres of the Lagan Navigation, from Belfast to Lisburn.

Belfast City Council also launched a £150m investment programme in 2012 to create a modern infrastructure to help communities and the wider city compete and grow now and in the future. This includes building city and community assets and delivering regeneration projects in local areas to improve quality of life.

Furthermore, within the policy framework for regeneration, the Department for Social Development manages a strategy for the renewal and development of the most deprived areas in and around Belfast. The four most important areas of work are encouraging investment and physical regeneration, raising educational achievement, improving access to employment, and creating safe, healthy communities.

The following programmes and measures are available in the promotion of urban regeneration within the City:

▪ Urban Development Grants (UDG): These are discretionary grants used for promoting job creation, inward investment and environmental improvement, by developing

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[23] Belfast City Council, http://www.belfastcity.gov.uk/cityregeneration/index.asp.

vacant, derelict or underused land or buildings in priority areas. Physical development projects such as inner/ middle city housing, retail, commercial and light industry can attract grants.

▪ Comprehensive Development Schemes: This involves the process of land acquisition and disposal to secure the better planning and regeneration of town and city centres. The scheme empowers the Department of Social Development to acquire land and arrange for its disposal and development, following public consultation, to unlock development opportunities.

▪ Environmental Improvement Schemes: These schemes are used to improve the appearance of our towns and cities and to regenerate areas by restoring confidence and attracting new investment. The scheme is mainly used to improve the appearance of public open spaces in the centres of our cities, towns and villages. One of the largest schemes carried out in Belfast was the Donegall Square Environmental Improvement Scheme. The Scheme, which was completed in 1996, cost £1.76m of which the Department contributed £1.18m, the balance being funded by Belfast City Council.

Renewing the Routes[24]

Regeneration is central to the Renewing the Routes project. This Belfast City Council initiative enables regeneration through working in conjunction with communities, businesses and agencies under the scheme to improve shopping areas and green spaces, develop gateways, introduce art and celebrate diverse heritage.

Since 2004, the Arterial Routes and Renewing the Routes programmes have:

▪ invested £6,000,000 in local regeneration projects;
▪ enhanced areas along ten main roads;
▪ revitalised 450 commercial frontages;
▪ improved 13 miles of the city;
▪ delivered 80 arts and landscaping projects;
▪ contributed to increases in turnover for local retailers;
▪ built relationships with over 50 partners.

Despite the commitment to regeneration and the investments made, the City continues to experience a lag in population in comparison to surrounding areas.

However, it is important to view these changes within the context of Local Government Reform which is due to be implemented in 2015. This will create significant changes with the transfer of planning and regeneration functions from central government to local government, combined with the power of community planning. While the detail of this is still to be worked through, this provides a significant opportunity to align and transform the existing approaches to regeneration and city planning at a city-wide and neighbourhood level. With the community plan providing an overarching framework for the

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[24] Belfast City Council, http://www.belfastcity.gov.uk/renewingtheroutes/index.asp

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area it will allow for a more integrated approach to developing and shaping areas that meet the needs of the local population.

Urban Regeneration and Community Development Policy Framework[25]

In addition, it is important to note that in the context of tackling deprivation the NI Executive has recently committed to deliver a range of measures to tackle poverty and social exclusion which will influence regeneration in its widest sense, through the Delivering Social Change framework. This framework aims to create new ways of working across government and in the wider public sector, in partnership with community, business and wider society.

The Social Investment Fund has been initiated as one of the levers under Delivering Social Change which enabled £80million to be allocated to deliver across four main aims at a regional level in April 2013. These aims include:

▪ building pathways to employment;
▪ tackling systemic issues linked to deprivation;
▪ increasing community services by regenerating and refurbishing existing facilities; and
▪ addressing dereliction and promoting investment in the physical regeneration of deprived communities.

Current strategy documents

Northern Ireland Housing Strategy 2012-17[26]

The Northern Ireland Housing Strategy is a five year phased plan which launched in 2012. Its primary focus is ensuring that everyone within Northern Ireland is given the opportunity to secure good quality housing at a reasonable cost. The plan encompasses and recognises the significant role housing can play in supporting and sustaining economic recovery, creating employment and regenerating deprived and neglected communities. To be successful in attaining these goals the Northern Ireland Housing Strategy 2012-2017 outlays a significant structural change to how the housing system operates within Northern Ireland. Three key areas of change have been identified to create the right conditions for a stable and sustainable housing market in the medium to long term:

▪ funding provisions of advice for those who are experiencing difficulties sustaining home ownership;
▪ providing support for first time buyers who have the capital available to sustain home ownership but cannot secure access to the housing market due to tough mortgage credit conditions;

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[25] Department for Social Development (DSD) (2012) *Urban Regeneration and Community Development Policy Framework*. Belfast: DSD
[26] Department for Social Development (DSD *Facing the Future: Housing Strategy for Northern Ireland* 2012-2017, Belfast (DSD).

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▪ providing support to others in attempt to increase the supply of new housing to meet the long term need.

With regards to the long-term stability of the housing market, the Regional Development Strategy 2035 indicates the need for around 11,000 new housing units per annum. In recent years the supply of new homes has hovered around 7,000 units per annum. It is believed that addressing this shortfall will create jobs and aid economic recovery. This strategy looks at potential partnerships which could combine to achieve this target.

Another principle area of the Northern Ireland Housing Strategy 2012-2017 focuses on the role housing can play in the regeneration of communities. In particular, communities that have experienced population decline, empty housing and blight. Developing housing can help re-shape communities and areas into places that people are proud to live.

Economic Strategy Priorities for Sustainable Growth and Prosperity 2011[27]

This strategy has been developed by locally elected politicians to meet the particular needs of the Northern Ireland economy, with the overall aim of increasing the country's economic competitiveness. This has been implicated through a specific focus on export led economic growth, prioritising the need to deepen and diversify our export base in order to increase employment and wealth across Northern Ireland. To attain this goal emphasis has been placed on the skills of our workforce, research, development and innovation. In order to focus on these areas and develop a more competitive economy, two key twin goals were identified; first, the rebalancing of the economy towards higher value added private sector activity, and second, the need to undertake a more immediate rebuilding phase, to address the impact of the global downturn on the local economy and labour market. The strategy outlines short, medium and long term goals for the Northern Ireland economy identifying a strategy up until 2030.

Community Safety Strategy for Northern Ireland 2012-2017[28]

The 'Building Safer, Shared and Confident Communities' report is a Community Strategy implementation plan phased over a five year period with the aim to provide safer, shared and confident communities across Northern Ireland by 2017. The establishment of these objectives is beyond the ability of the justice system alone, therefore, the plan adopts a multi-agency approach. The strategy provides key figures such as the local government, the Executive, the voluntary and community sector and local communities with an overall direction towards establishing community safety within Northern Ireland. Research conducted prior to the plan identifies the need for;

▪ **Safer communities:** with lower levels of crime and anti-social behaviour;
▪ **Shared communities**: where each person's rights are respected in a shared and cohesive community;

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[27] Northern Ireland Executive (2011) *Economic Strategy Priorities for sustainable growth and prosperity*
[28] Department of Justice (DOJ), (2012) *A Community Safety Strategy for Northern Ireland 2012-2017*, Belfast: DOJ.

perceptive insight

- **Confident communities:** where local people have confidence in the agencies which work on their behalf.

In aim of attaining these specifications the Community Safety Strategy for Northern Ireland introduced the Policing and Community Safety Partnerships (PCSPs) at Council level. These partnerships provide opportunities for the key figures, identified above, to work together in addressing the problematic issues within communities. The strategy recognises the unique difficulties which arise in communities and the need for each community's issues to be addressed individually. The PCSPs innovative solutions are developed and tailored to effectively address local needs and play a pivotal role in the delivery of community safety at community level. The introduction of PCSPs builds upon the success of District Policing Partnerships and Community Safety Partnerships in recent years.

Regional Transport Strategy 2002 – 2012[29]

The Regional Transportation Strategy (RTS) for Northern Ireland 2002-2012 identified strategic transportation investment priorities and considers potential funding sources and affordability of planned initiatives. The Strategy tackled deficiencies in the transportation systems to make best use of existing assets and introduced a number of important enhancements to the infrastructure and services.

The Strategy provided a range of transportation initiatives across Northern Ireland. Some of the principal initiatives included:

- upgrading the existing rail network and services (with the possible exception of the Antrim-Knockmore line which is the subject of a separate review);
- provision of new, modern trains and increased rail capacity;
- provision of new, modern accessible buses;
- the introduction of a rapid transit system in the BMA;
- improvements in towns across Northern Ireland to assist pedestrians and cyclists and to provide new bus services throughout the day.

Revised Regional Transportation Strategy 2011[30]

The Department for Regional Development released a revised strategy in 2011. The purpose of this document was to build on what was achieved through the original strategy, however with a shift towards moving people rather than vehicles and creating space on the networks for people. The primary focus of this revised policy is in relation to greater sustainability which will contribute positively to growing the economy, improving the quality of life for all and reducing the transport impacts on the environment. It includes the following high level aims:

- support the growth of the economy;

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[29] Department for Regional Development (DRD) (2002), *Regional Transportation Strategy for Northern Ireland 2002 – 2012*, Belfast: DRD.
[30] Department for Regional Development (DRD), (2011), Revised *Regional Transportation Strategy*, Belfast: DRD.

perceptive insight

- enhance the quality of life for society;
- reduce the environmental impact of transport.

Integrated Tourism Framework 2012-2014[31]

This strategic framework promotes Belfast's authenticity and European city experience. The strategy is aimed at developing and co-ordinating the city's natural, commercial and cultural assets. It is believed that this will attract a greater number of visitors to the city, maximising the economic benefits for Belfast and Northern Ireland, and particularly increasing jobs and opportunities.

The principal aim of this strategy is to make Belfast a recognised leading tourist destination and position it amongst the top twenty in Europe. This plan is implemented through the multi-modal partnership of organisations, institutions and businesses across the whole city. The strategy identifies and audits each tourist destination with an agreed template. It aims to agree a distinctive role for each tourist destination and identify how these hotspots can play a role in outlaying the Belfast story. Other crucial identified aspects to this strategy were: mapping connectivity and linkages between each destination for example access to public transport; possible introduction of bridges linking the Titanic Quarter to City Centre and Cathedral Quarter; enhancing visitor experiences; and other development opportunities, for example concerts, events and public realm opportunities e.g. the Crumlin Road Gaol.

Culture & Arts Framework for Belfast 2012-15[32]

Launched in October 2012, the 'Cultural Framework for Belfast' is a strategy outline which recognises the development of the city's culture and arts as central to making the city and its neighbourhoods better places to live, work, invest, visit and study. The three year strategy has developed culture, arts and heritage projects within the city; creating wealth by supporting jobs, attracting visitors and increasing economic investment.

The implementation of this strategy is being conducted through the identification of four key themes of focus; (1) Distinctly Belfast, (2) Inspiring Communities, (3) Attracting Audiences and (4) Strengthening the Sector. Each of these themes represents areas in which development is required to expand the cities cultural horizon in turn enhancing job prospects, tourist attractions and economic investment.

Key aims for 2012 to 2015:
- connect people to the city, its stories, places, arts and heritage;
- promote the value and authenticity of the city's heritage;
- place culture, arts and heritage at the heart of Belfast's ongoing narrative;
- remove barriers to participation to ensure that all sections of the community can engage with high-quality culture, arts and heritage;
- enable people to value and understand their places;

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[31] Belfast City Council (BCC) (2011) *Integrated Strategic Framework for Belfast Tourism 2010-2014.*
[32] Belfast City Council (BCC), (2012) *Cultural Framework 2012-2015.*

- develop shared cultural space which celebrates and promotes local cultures and communities;
- target areas and communities with low levels of engagement in culture and arts;
- increase the number of residents taking part in culture and arts;
- increase the number of visitors taking part in culture and arts;
- promote Belfast as a diverse and dynamic cultural city to existing and potential local and out-of state audiences;
- provide opportunities for organisations to develop and diversify their income streams;
- increase investment in culture, arts and heritage;
- develop a better infrastructure for skills development in Belfast;
- promote partnership working and collaboration.

The next chapter will review the changes in Belfast City population in comparison to surrounding metropolitan areas, in an attempt to shed light on population trends and explore potential reasons for this population lag.

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Population trends

Belfast City Council is the largest of the 26 Councils in Northern Ireland and is responsible for the city of Belfast. According to the 2011 Census, an estimated 280,962 people live in the city while over 671,599 live in the wider metropolitan area.

The city, and its wider metropolitan area, is the largest settlement in the region and the second largest city on the island of Ireland. The Belfast City Council area sits at the heart of the growing population of the wider Belfast Metropolitan Area, which also comprises the surrounding council areas of Castlereagh, Lisburn, North Down, Newtownabbey and Carrickfergus.

According to the 2011 Census, an estimated 280,962 people live in the city while over 670,700 live in the wider metropolitan area. This compares to 1,810,683 residents in Northern Ireland as a whole.

The total population of Belfast City Council has remained fairly static since 1991 (increase of 0.6%), when 279,237 people lived in the area. It fell by 0.7% to 277,392 in 2001 before rising again by 1.3% to 280,962 people for the most recent census in 2011 (*see* Table 5.1). In contrast, the population change over the same time period (from 1991 to 2011) for all Northern Ireland is an increase of 15.8%.

All of the surrounding Councils in the BMA have also had a much greater change in population, most notable being Lisburn and Carrickfergus with a 20.8% and 19.4% rise respectively.

Table 5.1: Change in population numbers in Belfast Metropolitan Area

Area	1991	2001	% change since 1991	2011	% change since 2001	% change since 1991
Belfast	279,237	277,392	-0.7	280,962	1.3	0.6
Castlereagh	60,799	66,487	9.4	67,242	1.1	10.6
Lisburn	99,458	108,690	9.3	120,165	10.6	20.8
Newtownabbey	74,035	79,996	8.1	85,139	6.4	15.0
North Down	71,832	76,320	13.1	78,078	6.6	8.7
Carrickfergus	32,750	37,659	15.0	39,114	3.9	19.4
Belfast Metropolitan Area	**618,111**	**646,544**	**4.6**	**670,700**	**3.7**	**8.5**
Northern Ireland	**1,577,836**	**1,685,267**	**6.8**	**1,810,863**	**7.5**	**15.8**

Prior to the economic downturn there was a significant investment in construction within the Belfast Metropolitan area which saw a change in the profile of housing. Many older terraced housing areas within Belfast City Council made way for less dense family housing. However there was also a trend towards apartment living.

While the total number of houses/dwellings across Northern Ireland increased by 12% between 2001 and 2011, there was an increase in the number of apartments/flats by 27%.

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In Belfast, the largest increases in the total numbers of houses/dwellings were in Rosetta (25%), Duncairn (25%), Island (22%) and Falls (21%).

Tables 5.2 and 5.3 show the change in number of households as well as the change in household size between 2001 and 2011. While Belfast City Council had a 0.9% increase in the number of households, when compared to 12.2% for the rest of Northern Ireland this is significantly lower.

Table 5.2: Change in number of households in Belfast Metropolitan Area

Area	2001	2011	% change since 2001
Belfast	119,553	120,595	0.9
Castlereagh	27,518	27,733	0.8
Lisburn	41,140	45,723	11.1
Newtownabbey	32,137	33,971	5.7
North Down	32,208	33,255	8.7
Carrickfergus	14,785	16,200	9.6
Belfast Metropolitan Area	**267,341**	**277,477**	**3.8**
Northern Ireland	**626,718**	**703,275**	**12.2**

In addition, in 2011 Belfast LGD had a relatively small household size (2.29) in 2011, especially when compared with Northern Ireland (2.54) and the other council areas within the BMA. It should be noted that across all areas in Northern Ireland there has been a fall in household size since 2001.

Table 5.3: Change in average household size in Belfast Metropolitan Area between 2001 and 2011

Area	2001	2011	% change since 2001
Belfast	2.38	2.29	-3.8
Castlereagh	2.44	2.40	-1.6
Lisburn	2.67	2.59	-3.0
Newtownabbey	2.51	2.45	-2.4
North Down	2.41	2.33	-3.3
Carrickfergus	2.52	2.39	-5.2
Northern Ireland	**2.65**	**2.54**	**-4.2**

Table 5.4 illustrates that wards in West Belfast are most likely to have experienced the highest levels of population decline in the last ten years (Upper Springfield – 11%; Andersonstown – 15%). Contrastingly, those wards in South Belfast were most likely to have experienced the greatest incidence of population increase. Rosetta, Shaftesbury, Windsor and Ballynafeigh had an increase of 28%, 25%, 15% and 13% respectively. Interestingly, The Mount in East Belfast experienced the largest increase in population in the last ten years (31%).

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Table 5.4: Change in population from 2001 to 2011 by ward

Ward Name	2001	2004	2007	2010	2011	% change
Andersonstown	5,752	5,645	5,302	5,064	4,907	-15%
Ardoyne	6,592	6,401	6,075	5,938	5,987	-9%
Ballyhackamore	5,689	5,525	5,468	5,646	5,939	4%
Ballymacarrett	4,933	4,756	4,761	4,808	4,908	-1%
Ballynafeigh	5,253	4,967	5,103	5,067	5,928	13%
Ballysillan	6,010	5,904	5,825	5,783	5,626	-6%
Beechmount	5,504	5,589	5,554	5,488	5,485	0%
Bellevue	4,925	4,684	4,691	4,879	4,910	0%
Belmont	6,022	5,919	5,968	6,030	6,165	2%
Blackstaff	3,964	3,730	3,641	3,497	3,998	1%
Bloomfield	5,528	5,325	5,396	5,495	5,453	-1%
Botanic	9,589	8,965	8,451	8,380	8,945	-7%
Castleview	4,862	4,802	4,765	4,684	4,722	-3%
Cavehill	5,270	5,144	4,961	4,901	4,820	-9%
Cherryvalley	5,920	5,748	5,738	5,712	5,920	0%
Chichester Park	5,106	4,946	4,949	5,151	5,452	7%
Cliftonville	5,412	5,106	5,056	5,106	5,330	-2%
Clonard	4,427	4,313	4,252	4,544	4,975	12%
Crumlin	4,351	3,986	4,310	4,504	4,582	5%
Duncairn	3,991	3,675	3,949	4,224	4,901	23%
Falls	5,075	4,946	4,938	4,865	5,184	2%
Falls Park	5,889	5,552	5,292	5,276	5,343	-9%
Finaghy	4,960	4,823	4,536	4,454	4,555	-8%
Fortwilliam	4,776	4,576	4,646	4,596	4,561	-5%
Glen Road	5,868	5,648	5,445	5,324	5,573	-5%
Glencairn	3,998	3,922	3,712	3,660	3,749	-6%
Glencolin	7,130	7,025	6,924	6,726	6,498	-9%
Highfield	5,307	5,360	5,572	5,641	5,651	6%
Island	4,270	4,036	4,456	4,970	5,014	17%
Knock	5,006	4,667	4,657	4,612	4,827	-4%
Ladybrook	6,388	6,171	6,342	6,207	6,519	2%
Legoniel	5,542	5,339	5,628	6,166	6,409	16%
Malone	5,708	5,569	5,373	5,218	5,555	-3%
Musgrave	5,264	5,068	4,899	4,747	4,927	-6%
New Lodge	5,214	5,113	5,019	4,899	4,950	-5%
Orangefield	5,477	5,400	5,462	5,582	5,619	3%
Ravenhill	5,517	5,449	5,516	5,629	6,041	9%
Rosetta	5,116	5,207	5,386	5,595	6,564	28%
Shaftesbury	5,786	6,067	6,266	6,352	7,214	25%
Shankill	3,778	3,811	3,792	3,672	3,816	1%
Stormont	5,516	5,419	5,352	5,357	5,548	1%
Stranmillis	7,652	7,574	7,323	7,358	8,139	6%
Sydenham	5,231	4,990	4,856	4,838	4,874	-7%
The Mount	4,254	4,188	4,596	5,028	5,591	31%
Upper Malone	4,922	4,819	4,659	4,547	4,841	-2%
Upper Springfield	5,907	5,732	5,467	5,245	5,250	-11%
Water Works	6,292	5,984	5,852	5,914	5,829	-7%
Whiterock	5,422	5,195	5,292	5,186	5,694	5%
Windsor	7,089	6,791	6,855	6,978	8,141	15%
Woodstock	5,141	5,007	4,937	4,907	5,445	6%
Woodvale	4,577	4,405	4,268	4,295	4,088	-11%

Given that population change is one of the primary indicators of a city's economic and urban health[33], Belfast City Council is keen to understand the factors that impact on

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[33] Parkinson, Michael (2004) *Belfast: Competitive City?*,
http://www.belfastcity.gov.uk/stateofthecity/michaelparkinson.asp.

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people's choices to live or move from the area so that strategic action can be taken to encourage current residents to remain and encourage others to relocate within Belfast. The next section reviews potential push and pull factors, which have been identified within previous research, in an attempt to understand reasons for this population change.

Push and pull factors

There are a number of drivers, known and *push* and *pull* factors that influence where a person decides to live. Historically, the main components of population change are:[34]

- natural change (the difference between births and deaths);
- internal migration (which refers to migration within Northern Ireland);
- external migration, which refers to migration from Britain, the Republic of Ireland and the rest of the world.

The below diagram summarises some of the push and pull factors (grouped by broad themes of: physical, economic, social and political) which may be impacting on population change in the Belfast City Council area. By understanding the push and pull factors further, the Council will be able to focus on actions it can take to encourage residence.

Figure 6.1: Push and pull factors

	Push	Pull
Physical:	Lack of housing Lack of green space Disused shops Noise pollution Traffic congestion	Convenience to work / entertainment / education Regeneration of city centre
Economic:	Cost of housing/living	Availability of work Corporate headquarters / central management functions located in city
Social:	Crime / anti-social behaviour	Close to family Wide range of entertainment / cultural facilities
Political:	Troubles Peace walls Residential segregation	Political affiliation

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[34] Northern Ireland Housing Executive (2011) *The Belfast Metropolitan Housing Market Area: A local housing system analysis*, NIHE.

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Previous research

Previous research findings[35] have highlighted how natural change was the main contributor to population growth in Northern Ireland in the 1990s. This remained the case until 2004 when the increase in international migration led to the emergence of net in-migration. NISRA (2009)[36] estimate in the decade to 2004 that the population of Northern Ireland increased by an average of 7,000 persons each year (0.4%) but this figure more than doubled to 16,100 between 2004 and 2008 (1.0%).

In spite of this recent trend, previous publications[37] indicate that natural change has remained the main contributor to population growth in the Belfast Metropolitan Area. The decline in the BMA population from 2001-2004 was the result of net out-migration, which was considerably in excess of natural growth. Between 2004 and 2008 a sharp increase in net migration largely offset the continuing outflow of individuals to the rest of Northern Ireland, primarily to other sub-markets in the BMA. At the other end of the scale, net migration was the main driver of population growth in Ards Peninsula and North Down from 2001 to 2008. Evidence suggests that North Down tended to attract mainly middle aged and older residents from BMA. The Ards Peninsula tended to attract people from BMA and North Down, many of whom are aged over 40 years. There was also evidence of an increase in international migrants coming to the Ards Peninsula between 2001 and 2008, mainly from Europe.

Cooper et al. (2001)[38] reinforce the notion that population decline in Belfast City has been a result of out migration. This publication recognises that such migration is common to most UK cities, however that it has been exacerbated in Northern Ireland by the 'Troubles'.

Information gathered from *Belfast - A Profile of the City (2009)*[39] also suggests that high levels of deprivation may be influential in encouraging people to move from Belfast City Centre. This document highlighted figures from the Northern Ireland Multiple Index of Deprivation (2005) which revealed that Belfast:

▪ is the most deprived out of the 26 Local Government Districts;
▪ has eight of the 10 most deprived wards in Northern Ireland and nine of the 10 worst wards in relation to health deprivation;
▪ there are 82,986 people in Belfast experiencing income deprivation and 30,119 people experiencing employment deprivation.

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[35] Northern Ireland Housing Executive (2011) *The Belfast Metropolitan Housing Market Area: A local housing system analysis,* NIHE.
[36] Northern Ireland Statistics and Research Agency (2009) *Population & Migration Estimates Northern Ireland –* Statistical Report, NISRA.
[37] Northern Ireland Housing Executive (2011) *The Belfast Metropolitan Housing Market Area: A local housing system analysis,* NIHE.
[38] Cooper, J., Ryley, T., and Smyth, A (2001) Contemporary lifestyles and the implications for sustainable development policy: lessons from the UK's most car dependent city, Belfast, *Cities,* 18 (2), 103 – 113.
[39] Belfast City Council (2009) *Belfast: A Profile of the City 2009 – 2010.*

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Multiple deprivation indicators

Table 6.1 depicts ward level population change alongside measures of multiple deprivation in order to gain insight into the factors which may be contributing to the population decline. For each of the factors the highest ranking wards are highlighted in blue and the lowest ranking are highlighted in brown.

Interestingly, the trends in population increase/decrease do not appear to correspond to any specific causal factor. For example, Cavehill has experienced a 9% decrease in population in the last ten years. However, this same ward ranks highly in terms of income, health and living environment. The Mount has experienced the greatest level of population increase (+31%) however this ward ranks lowly in terms of living environment domain.

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Table 6.1: Multiple deprivation rankings by ward

	Pop. change from 2001 to 2011	Multiple Dep-rivation Measure Rank	Income Rank	Employ-ment Rank	Health Dep-rivation and Disability Rank	Living Environ-ment Rank	Crime and Disorder Rank
Andersonstown	-15%	118	129	72	73	160	160
Upper Springfield	-11%	11	16	9	6	107	98
Woodvale	-11%	19	25	22	44	24	138
Ardoyne	-9%	9	7	18	10	11	68
Falls Park	-9%	101	121	81	51	171	55
Cavehill	-9%	523	540	509	532	325	103
Glencolin	-9%	33	49	27	34	134	126
Finaghy	-8%	550	531	543	514	352	254
Botanic	-7%	237	362	519	351	13	1
Sydenham	-7%	206	245	235	169	56	233
Water Works	-7%	16	22	19	20	4	2
Musgrave	-6%	433	400	360	359	214	145
Glencairn	-6%	31	50	31	43	98	153
Ballysillan	-6%	157	198	154	232	102	197
Glen Road	-5%	43	51	24	31	111	121
New Lodge	-5%	3	5	5	3	8	19
Fortwilliam	-5%	293	326	285	222	85	43
Knock	-4%	449	417	411	373	229	290
Malone	-3%	564	575	571	575	196	200
Castleview	-3%	230	218	199	191	121	144
Upper Malone	-2%	328	273	283	347	201	274
Cliftonville	-2%	64	59	71	67	65	11
Ballymacarrett	-1%	18	21	29	21	36	107
Bloomfield	-1%	196	187	322	186	29	81
Cherryvalley	0%	542	487	521	481	315	368
Bellevue	0%	155	138	162	182	143	80
Blackstaff	1%	42	86	79	36	2	40
Shankill	1%	4	6	11	5	26	27
Stormont	1%	576	563	572	563	399	418
Falls	2%	2	4	3	1	39	6
Ladybrook	2%	88	77	65	69	212	154
Belmont	2%	444	404	462	378	237	214
Orangefield	3%	485	459	501	383	186	245
Ballyhackamore	4%	493	456	541	386	136	137
Crumlin	5%	6	13	7	13	51	51
Whiterock	5%	1	1	1	2	33	41
Woodstock	6%	39	53	110	45	5	60
Stranmillis	6%	563	580	582	582	275	244
Highfield	6%	78	139	51	90	131	151
Chichester Park	7%	119	127	149	83	21	10
Ravenhill	9%	469	449	529	474	88	108
Clonard	12%	7	9	8	4	35	22
Ballynafeigh	13%	251	260	434	258	18	47
Windsor	15%	421	484	562	404	31	33
Legoniel	16%	56	64	50	85	91	37
Island	17%	92	97	190	114	58	64
Duncairn	23%	14	20	17	18	15	25
Shaftesbury	25%	22	29	44	15	22	28
Rosetta	28%	476	424	518	377	170	140
The Mount	31%	25	24	58	25	12	29

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Noise as a potential 'push' factor

A further example of a potential push factor is noise pollution, evidenced within the following table. This information illustrates the extent of noise pollution in Belfast City in comparison to surrounding areas. However, it is important to note that Belfast City Council is the only area to run an out-of-hours noise service and would therefore be expected to have a higher incidence of recorded noise complaints.

Table 6.2: Incident of noise complaints in Belfast and surrounding areas

	Street Noise complaints 2011	Party noise complaints 2011	Total Noise complaints 2011	Total Noise complaints 2011 as a % of population
Belfast	206	3,220	6,031	2.15%
Castlereagh	6	48	186	0.28%
Lisburn	7	106	457	0.38%
Newtownabbey	13	63	330	0.39%
North Down	0	72	281	0.36%
Carrickfergus	8	45	184	0.47%
Northern Ireland	**278**	**4,742**	**11,687**	**0.65%**

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Previous research findings

Having reviewed the policy context, population trends and potential 'push' factors which may have contributed to the population trends in Belfast City Council, this section reviews previous published literature specific to Belfast City. Such information may reinforce some of the 'push' factors highlighted in the previous chapter, and may shed some light on how the population regression can be tackled.

'Belfast; Competitive City?' (Parkinson, 2004)[40]

Michael Parkinson's research paper, 'Belfast; Competitive City?' was highly influential in recognising the importance of a large population to Belfast's future and in contributing to the development of subsequent policy initiatives. Whilst highlighting the declining population of Belfast City, nevertheless, this paper revealed that Belfast was performing better than most UK cities in terms of employment, with 7% growth between 1996 and 2001. Findings also revealed that Belfast was performing comparatively to other leading European cities.

'Population Change in Belfast' (Belfast City Council, 2006)[41]

Subsequent to the publication of the Parkinson (2004) report, Belfast City Council commissioned research to explore the status of Belfast's population. Findings revealed that the City Council area had declined in population, whilst the wider BMA had experienced a rapid population growth. The research enabled Belfast City Council to conclude that population regression may be a consequence of:

▪ socio-economic influences: with high levels of deprivation and crime in Belfast city compared to surrounding areas;
▪ low international migration inflows: in contrast to Manchester, Birmingham, Leeds, Newcastle and Liverpool, who experienced large international migration inflows, in contrast, Belfast experienced a high net migration outflow. Although Northern Ireland experienced a large entry of Eastern European migrants in 2004, less than 10% of these were believed to arrive in Belfast.

This research incorporated a series of recommendations to reduce the population decline in Belfast City Council area. These include:

▪ develop stronger planning controls in order to stimulate economic development;
▪ increase police presence and instil a sense of safety across the City;
▪ provide a wider range of entertainment options, suitable for a range of demographics; and

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[40] Parkinson, Michael (2004) *Belfast: Competitive City?*
http://www.belfastcity.gov.uk/stateofthecity/michaelparkinson.asp.
[41] *Belfast City Council (2006) Population Change in Belfast: the development brief*
http://www.belfastcity.gov.uk/stateofthecity/docs/CurrentDevelopmentBrief/DevelopmentBrief9.pdf.

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- Aim to reduce city centre house prices.

'My City: My Neighbourhood (Belfast City Council, 2010)[42]

More recently, Belfast City Council conducted a consultation with residents of Belfast City Council utilising a combination of questionnaires and public forums. Survey responses revealed that respondents would like the following to be set as priorities for Belfast:

- create a safer city (53%);
- ensuring the city is a cleaner place (31%);
- improving local areas (25%).

Residents also recommended:
- more activities for children and young people (43%);
- lower levels of anti social behaviour (37%);
- cleaner streets (26%);
- more community activities (22%);
- lower levels of crime (19%).

Responses from the consultation were incorporated into the Belfast City Council's Corporate plan, which set out the council's vision and priorities for the future of the city.

Residents' Survey: Belfast City Council[43]

Belfast City Council also conducts a survey of Belfast City Council residents to explore their satisfaction of living in the city and gain recommendations for improvement. In August 2010, the research consisted of 1,600 face-to-face surveys. The purpose of the survey was to obtain householders' views about living in the city, as well as gauging views of Belfast City Council services. Beforehand, the residents' survey was previously conducted in 2004 and 2007.

Overall, feedback from the 2010 survey indicated that residents were generally very positive about living in Belfast. Findings revealed that:

- 96% of those surveyed enjoy living in Belfast. This has remained the same since 2007;
- 84% were satisfied with their local area;
- 56% think that Belfast has improved over the past three years while 14% thought it had got worse.

However, the survey revealed a number of recommendations for improvement. Consistent with findings from the 'My City: My Neighbourhood' consultation, 50% recommended the creation of a safer city. Other recommendations are summarised below:

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[42] Belfast City Council (2010) *My City, My Neighbourhood*
http://www.belfastcity.gov.uk/myneighbourhood/surveyresults.asp.
[43] Belfast City Council (2010, 2007, 2004) , *Residents Survey*
http://www.belfastcity.gov.uk/consultations/publicsurvey2010.asp.

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- improve the cleanliness of the city (31%)
- support children and young people (31%);
- invest in improving local areas (30%);
- help to support and improve the city's economy (24%);
- provide value for money services (23%).

Findings from the 2007 residents' survey provide further insight into factors which have reduced householders' satisfaction with living in the Belfast. Respondents indicated that they were dissatisfied with the following aspects of city living:

- lack of affordable housing (47%);
- cost of living (44%);
- traffic congestion (42%);
- antisocial behaviour (24%);
- religious tension (9%).

Such findings may shed some light on potential push factors contributing to population decline in the Belfast City Council area.

Neighbourhood Renewal: Mid-Term review 2011[44]

The purpose of the Neighbourhood Renewal programme and publication of a mid-term review has been outlined in Chapter 2 of this paper. Findings from the 2011 strategy review revealed the following trends in the Neighbourhood Renewal areas:

- between 2001 and 2008 the population of the Neighbourhood Renewal Areas fell by 0.9% whilst the Northern Ireland population increased by 5.1%.

Overall, Neighbourhood Renewal Areas continue to demonstrate higher levels of unemployment and inactivity than in the population as a whole. Although there was a substantial increase in the number of employee jobs in Neighbourhood Renewal Areas between 2001 and 2007 (a 14% increase compared to 8% in the rest of the country), economic inactivity due to ill health remains a problem.

The more recently published *Outcome Indicators Report (2012)*[45] provides some useful information on Belfast Neighbourhood Renewal Areas. Whilst overall crime rates in Neighbourhood Renewal Areas decreased from 147.3 in 2003/04 to 129.3 in 2010/11, nevertheless Belfast and Regional Development Office areas however continue to have a recorded crime rate almost *3 times that of the non-Neighbourhood Renewal Areas.*

Anti-social behaviour
Overall, the number of reported incidents of anti-social behaviour has decreased from 25,826 to 23,845 across the 36 Neighbourhood Renewal Areas. However, this has not been the case across individual areas, as there has been an increase in 12 Neighbourhood

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[44] DSD (2011) *People and Place: A Strategy for Neighbourhood Renewal* Mid – Term Review.
[45] DSD (2012) *People and Place: A Strategy for Neighbourhood Renewal* Outcome Indicators Report.

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Renewal Areas. Those areas experiencing significant increases are Ligoniel (+55.8%), Outer West Belfast (+44.1%) and Dungannon (+31.3%). Therefore, statistics reveal that Belfast based Neighbourhood Renewal Areas continue to experience some of the highest levels of anti-social behaviour.

Alcohol and drug related deaths

Statistics reveal that Neighbourhood Renewal Areas in the Belfast Regeneration Office had the highest level of alcohol and drug related deaths. In the period 2005-2009 the Belfast Regeneration Office area experienced 279 alcohol related deaths, compared to the North West Development Office area with 100 deaths and Regional Development Office area at 82.

Similarly, between 2005 and 2009 the Belfast Regeneration Office area recorded 94 drug related deaths compared to the North West Development Office area with 23 deaths and the Regional Development Office area at 20.

Whilst it should be noted that the information pertains to the Belfast Neighbourhood Renewal Areas and is not relevant to Belfast City Council as a whole, nevertheless, statistics illustrate that some parts of Belfast are continuing to experience higher levels of crime and anti-social behaviour than other Neighbourhood Renewal Areas and non–Renewal areas.

Attitudes to Peace Lines (University of Ulster, 2012)[46]

The University of Ulster recently released findings from a postal survey of over 1,000 Peace Line residents in North, East and West Belfast, as well Peace Line residents from Derry/Londonderry.

In the context of this review, it is useful to explore some of the findings from the survey with respondents from north, west and east Belfast. Information can be used to understand residents' satisfaction with their neighbourhood and whether they believe peace walls are a barrier to population growth.

Summary of findings

Interestingly, findings showed that respondents generally feel there is a strong sense of community in their area. Residents from east Belfast were more likely to indicate that there was a strong sense of community in their area, compared to those in north and west Belfast (76% compared to 61% and 59% respectively).

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[46] University of Ulster (2012) *Attitudes to Peace Lines.*

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Figure 7.1: Residents' perceptions on the sense of community in their neighbourhood

% rating their area as having a strong sense of community
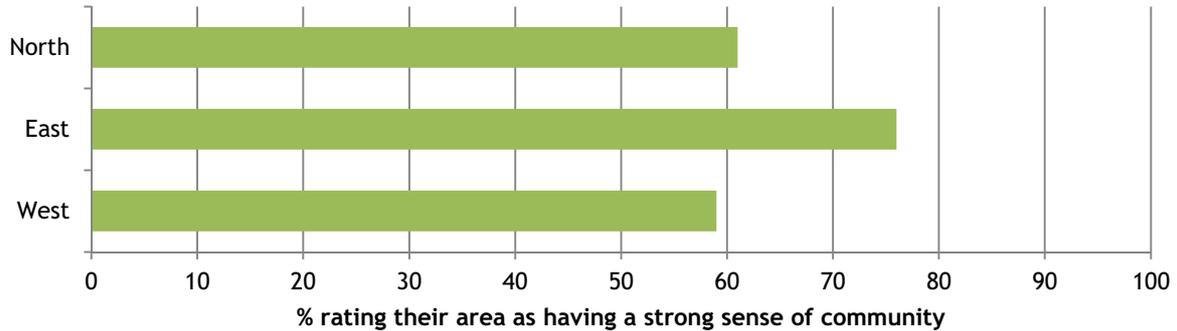
Generally, respondents indicated that there have been no physical developments made to their area since the Good Friday Agreement. Respondents in west (51%) and north (50%) Belfast were more likely than those in east Belfast (36%) to indicate that there had been no physical developments.

Figure 7.2: Incidence of physical re-development

% saying 'no' to physical improvements being made since 1998
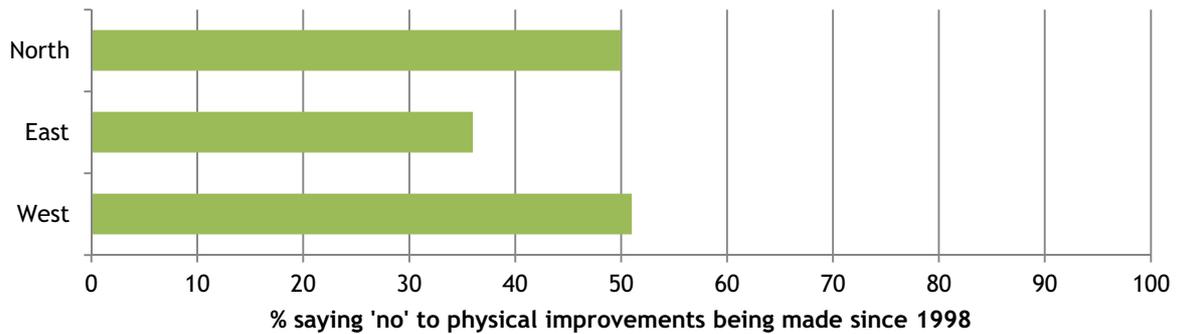
Across north, east and west Belfast, just under 40% indicated that the Peace Line is preventing community expansion in their area. Such findings may provide insight into factors influencing population change in particular areas.

Figure 7.3: Investigating the impact of Peace Line in preventing community expansion

% saying 'yes' to Peace Line stops community from expanding
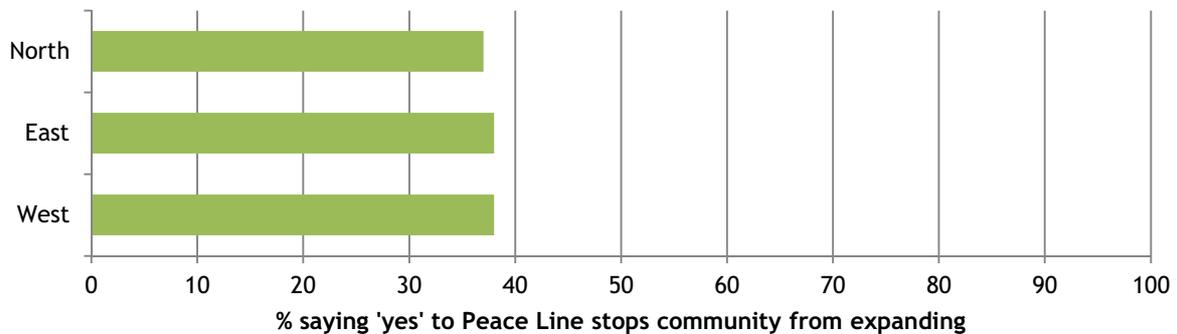
Previous research findings provide some insight to the potential push factors which may be contributing to the population decline in the Belfast City Council Area. These include:

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- higher levels of *crime and anti-social behaviour* in Belfast compared to other areas;
- greater incidence of *alcohol and drug related deaths*, suggesting a greater incidence of substance abuse;
- residents' concerns about the *safety*;
- perceived *lack of physical regeneration* in Peace Line areas;
- Peace Lines acting as a physical barrier *limiting community expansion*.

Such findings may be beneficial in supporting policy makers to develop interventions to reduce and negate such concerns amongst residents of the Belfast City Council area. It is worth considering these factors further through the quantitative research.

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Attitudinal survey

Summary of approach

In this section we have detailed the tasks that were undertaken during the implementation of the survey. This element of the research targeted three defined samples:

- residents of Belfast City Council;
- residents in the wider Belfast Metropolitan area, including those who previously lived in Belfast;
- people who work in Belfast but live elsewhere.

The following paragraphs comprehensively detail the sampling process for each aspect.

Sample 1: Residents of Belfast City Council

The survey was conducted with 786 people across 38 wards in the Belfast City Council area.

The sample was selected based upon analysis of the wards most affected by population increase or decline in the last ten years (*source*: Census, 2001; Census, 2011). Wards that have experienced a significant population decline or increase (+/-10% or more) had a higher proportion of the population selected for interview. The distribution of the remaining samples were evenly spread across 35 wards, representative of the population north, south, east and west of the city.

Table 8.1 provides an overview of the number of interviews achieved in each ward in relation to areas of 10% growth in population, areas of between +10% and -10% population change and areas of 10% decline in population. Table 8.2 provides a breakdown of the number of interviews achieved in northern, southern, eastern, western and Shankill wards within Belfast City Council area.

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Table 8.1: Number of interviews achieved by population increase/decline

	Interviews achieved	% achieved interviews
Wards experiencing an increase (10% or more)		
Ballynafeigh	17	2%
Clonard	20	3%
Duncairn	20	3%
Island	19	2%
Legoniel	20	3%
Rosetta	20	3%
Shaftesbury	20	3%
The Mount	20	3%
Windsor	20	3%
Total	**176**	**22%**
Wards experiencing a decrease (10% or more)		
Andersonstown	40	5%
Upper Springfield	40	5%
Woodvale	40	5%
Total	**120**	**15%**
Remaining wards		
Wards experiencing an increase/decrease less than 10%	**490**	**62%**
Total number of interviews	**786**	**100%**

Table 8.2: Number of interviews achieved by location

	Interviews achieved	% interviews achieved
BCC North	126	16%
BCC South	178	23%
BCC East	219	28%
BCC West	182	23%
BCC Shankill	81	10%
Total number of interviews	**786**	**100%**

Quotas were applied to the number of interviews conducted based on gender and age, while minimum quotas were applied to Socio-Economic Group (SEG). The following table shows the quotas that were applied based on 2011 Census data and the number of interviews achieved.

Table 8.3: Population distribution and interviews achieved

		Census 2011 data	Interviews achieved	% achieved interviews
Gender	Male	48%	363	46%
	Female	52%	423	54%
Age	18 to 35	37%	265	34%
	36 to 65	45%	363	46%
	66+	18%	158	20%
SEG	ABC1	43%	312	40%
	C2DE	57%	471	60%
	Refused	-	3	0%
Total		100%	786	100%

Respondents were also asked if they considered themselves to be a migrant worker, and 2% of Belfast City Council residents said that they were.

Sample 2: Residents in the wider Belfast Metropolitan area

The survey of consumers was conducted with 753 people living within the BMA (excluding Belfast Local Government District). The following table provides a breakdown of the number of interviews achieved in BMA.

Table 8.4: Number of interviews achieved by location

	Interviews achieved	% achieved interviews
Castlereagh	150	20%
Carrickfergus	104	14%
Newtownabbey	128	17%
North Down	152	20%
Lisburn	219	29%
Total number of interviews	753	100%

Quotas were applied to the number of interviews conducted based on gender, age and SEG. The following table shows the quotas that were applied based on 2011 Census data and the number of interviews achieved.

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Table 8.5: Population distribution and interviews achieved

		Census 2011 data	Interviews achieved	% achieved interviews
Gender	Male	48%	353	47%
	Female	52%	400	53%
Age	18 to 35	29%	232	31%
	36 to 65	51%	367	49%
	66+	19%	154	20%
SEG	ABC1	47%	354	47%
	C2DE	53%	398	53%
Total		**100%**	**753**	**100%**

3% of BMA respondents considered themselves to be a migrant worker.

Figure 8.1 illustrates that 39% of BMA respondents have previously lived in Belfast City Council. Older respondents are more likely to have previously lived in Belfast City Council, as are those from ABC1 groups. Over two fifths of respondents from Castlereagh (49%), Lisburn (41%) and North Down (40%) indicated that they have previously lived in BLGD area.

Figure 8.1: Previous experience living in Belfast Local Government District area
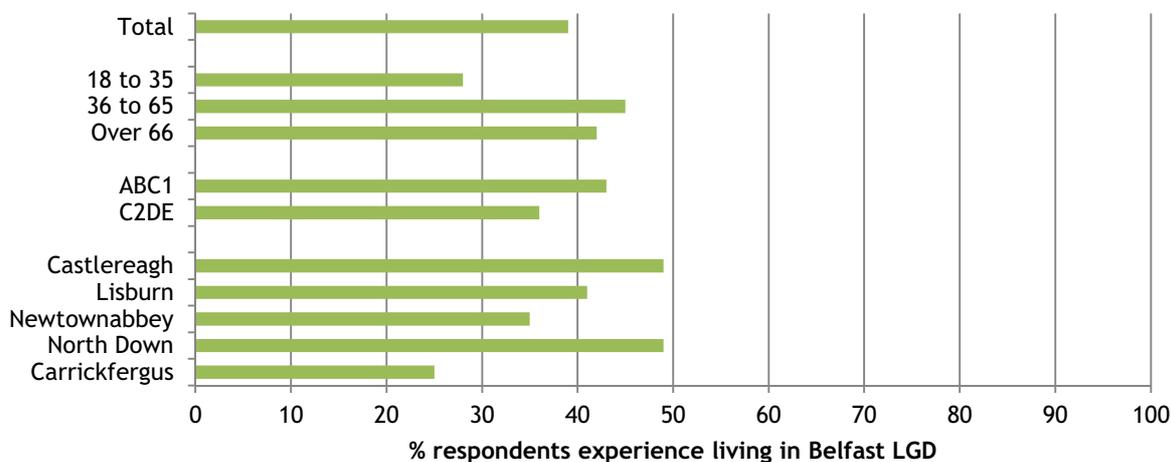
Almost half of BMA residents who have previously lived in BLGD indicated that they did so more than 20 years ago. One in ten (11%) indicated that they have moved from Belfast in the last three years.

Figure 8.2: Length of time since respondents lived in Belfast Local Government District

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% respondents years lived in Belfast LGD

- A year or less
- More than a year, up to 3 years
- More than 3 years, up to 5 years
- More than 5 years, up to 10 years
- More than 10 years, up to 15 years
- More than 15 years, up to 20 years
- More than 20 years
- Don't know/can't remember
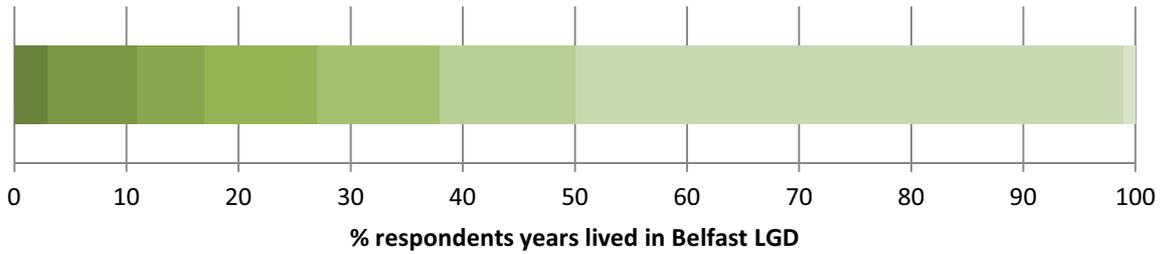
Sample 3: People who work in Belfast but live elsewhere

This survey was conducted with 323[47] people who work in Belfast but who live outside the BLGD area. The survey was conducted on-street in the city centre and main thoroughfares, at Park and Ride facilities as well as bus-stops, bus stations and train stations.

The purpose of this survey was to capture the views of commuters, who have chosen to live outside the city even though they travel in for employment.

The following table illustrates the number of interviews completed with commuters, broken down by their proximity to Belfast:

Table 8.6: Commuters proximity to Belfast

	Interviews achieved	% achieved interviews
Live between 3.1 and 5 miles from BCC	43	13%
Live between 5.1 and 10 miles from BCC	125	39%
Live more than 10 miles from BCC	155	48%
Total number of interviews	323	100%

---

[47] This includes 73 people who were interviewed as part of the BMA survey.

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Key findings

The following chapters present the findings from the attitudinal survey.

In order to gain an insight into the key push and pull factors affecting peoples' decision to live in and outside Belfast, findings have been summarised within three categories of influence (physical, social and cultural, and economic). For each category, findings are analysed by the following demographics:

- whether the respondent resides in Belfast City Council or BMA;
- whether the respondent resides in a ward in Belfast City Council which has been affected by population increase or decline;
- respondent age;
- social Economic Group;
- intention to live (or continue living) in Belfast City Council area;
- previous history of living in Belfast City Council (BMA residents only);
- number of people living in household.

Physical influences

This section reviews the extent to which physical factors may be have influenced respondents' decision to live where they live.

Size and type of housing

Respondents were asked some questions in relation to their size and type of house, in order to gain insight into whether housing has any influence on where people choose to live.

Figure 9.1 illustrates that almost two thirds (62%) of Belfast City Council residents surveyed live in terraced housing, compared to one third (33%) who live in the BMA area. While 15% of BMA respondents live in detaching housing, this compares to 4% Belfast City Council residents. Perhaps not surprisingly, findings suggest that BMA residents may be more influenced by a desire to have a larger house.

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Figure 9.1: Comparing type of housing in BMA and Belfast City Council
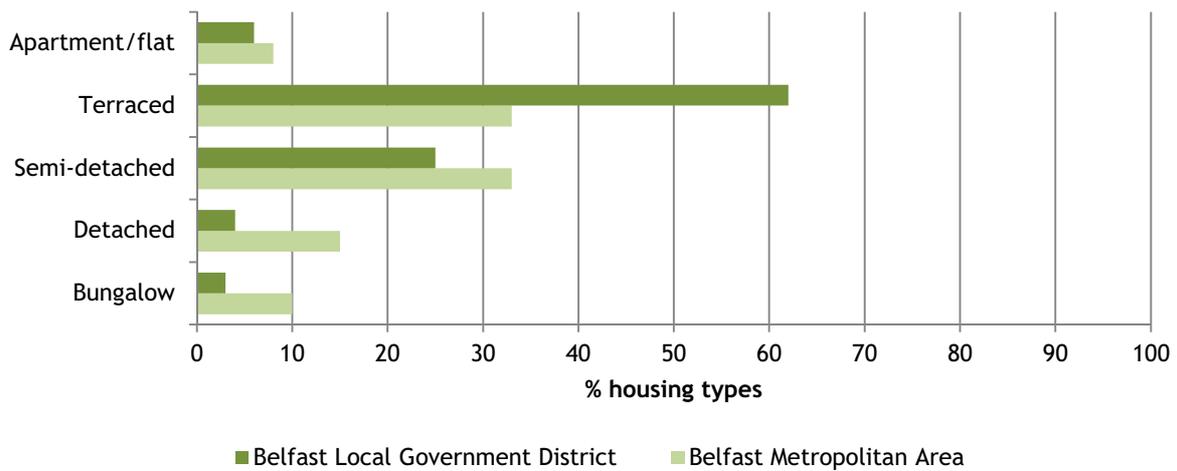
Respondents from Belfast City Council (32%) are more likely to indicate that they live in two bedroom housing compared to those in BMA (20%). Slightly more respondents in the BMA area indicated that they live in three (59%) or four (17%) bedroom housing compared to those from Belfast City Council (52% and 11% respectively). Again, findings suggest that size of house may be an influencer for BMA residents.

Figure 9.2: Comparing size of house in BMA and Belfast City Council
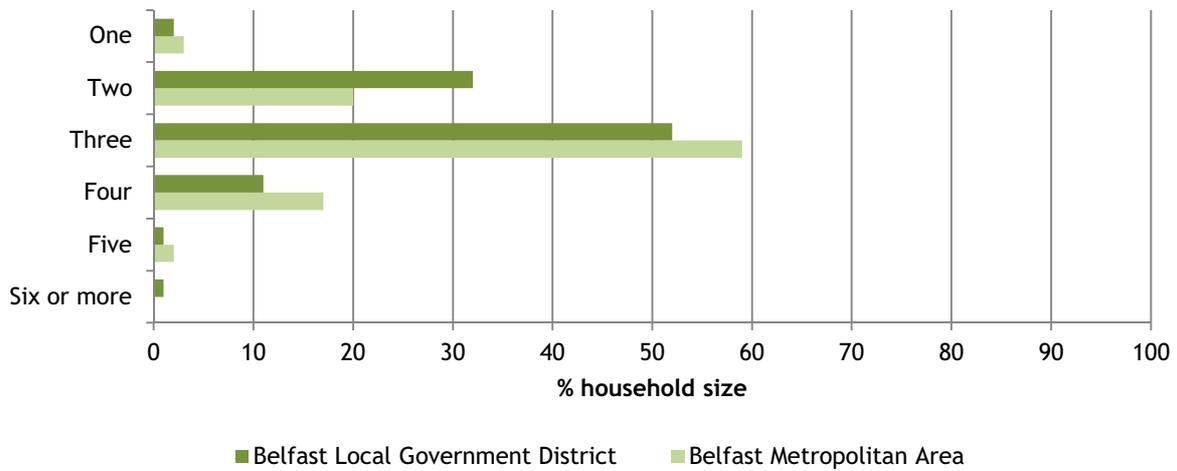
92% of respondents in BMA indicated that they have a garden. This compares to 81% of Belfast City Council residents.

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Figure 9.3: Incidence of having a garden by locality

% households who have a garden

■ Belfast Local Government District   ■ Belfast Metropolitan Area
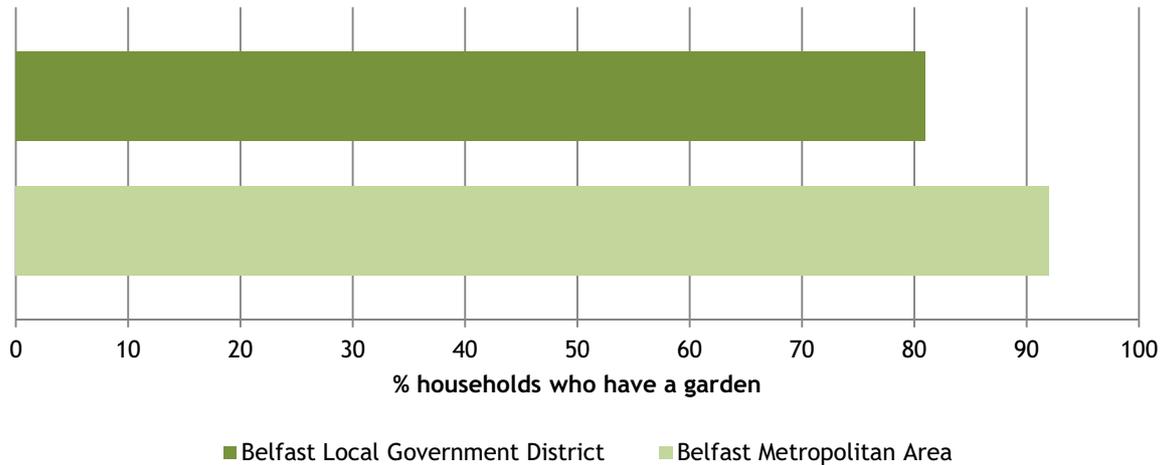
Physical pull factors

All respondents were asked to rate the extent to which a series of factors have influenced their choice of current residence, using a scale of 1 to 5 (where 1 is no influence and 5 is significant influence). This section reviews respondents' feedback in relation to physical pull factors and compares how they rated each factor on average (where 5 is the highest possible average score). The following paragraphs describe the differences and similarities across the various types of respondents, with a series of spider diagrams to illustrate the impact of the various factors.

Belfast City Council vs BMA

Those who live in Belfast City Council are more likely to indicate that they are influenced by *proximity to amenities* (mean score 4.1) and a *good public transport network* (3.9) compared to those who live in BMA. Perhaps not surprisingly, people who reside in BMA indicated that they are more strongly influenced by a *larger house or garden* (3.1), *access to outdoor activities* (3.3); and a *good outdoor environment* (3.5) than Belfast residents.

Figure 9.4: Influence of physical factors by respondent type

(where 1 is no influence and 5 is significant influence)

■ Belfast Local Government District   ■ Belfast Metropolitan Area
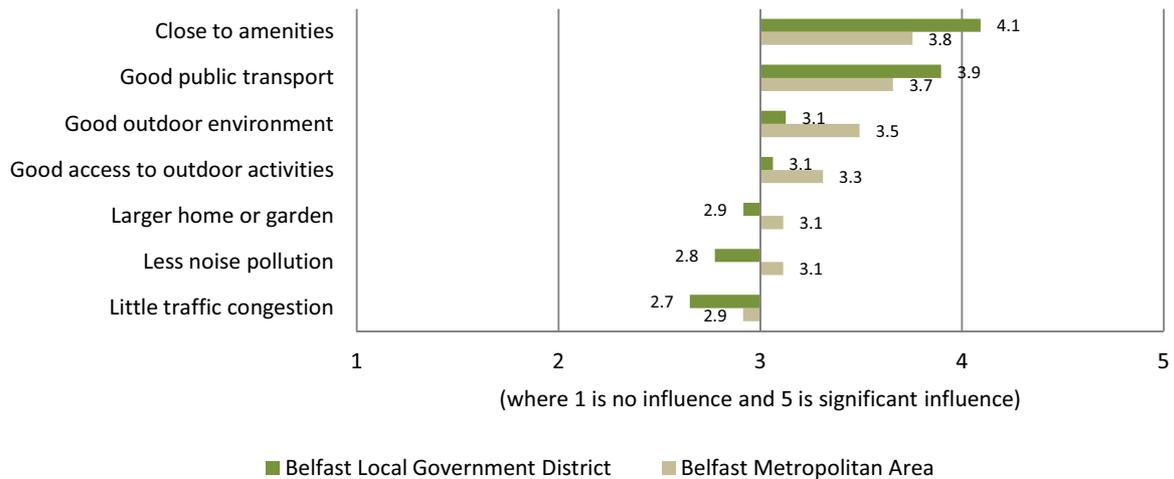
Population shift in Belfast wards

Respondents who reside in Belfast wards that have experienced a population increase in the past ten years (more than 10%) are more likely to indicate that they are influenced by the following factors than those who live in areas which have experienced a decline:

- *proximity to amenities* (average score 4.3 in areas with more than 10% **increase**; compared to average score 3.6 in areas with more than 10% **decrease**);
- *good public transport network* (4.1 compared to 3.5);
- *good access to outdoor activities* (3.1 compared to 2.8);
- *good outdoor environment* (3.2 compared to 2.7).

Overall, physical factors were rated less highly in terms of influence by respondents who live in wards which have experienced a population decline, with the exception of larger house or garden (average score 3.1 in areas with more than 10% decrease compared to 2.9 in areas with 10% increase).

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Figure 9.5: Influence of physical factors by population shift in Belfast wards

(where 1 is no influence and 5 is significant influence)

■ More than 10% increase　■ Between +10% and -10% change　■ More than 10% decrease
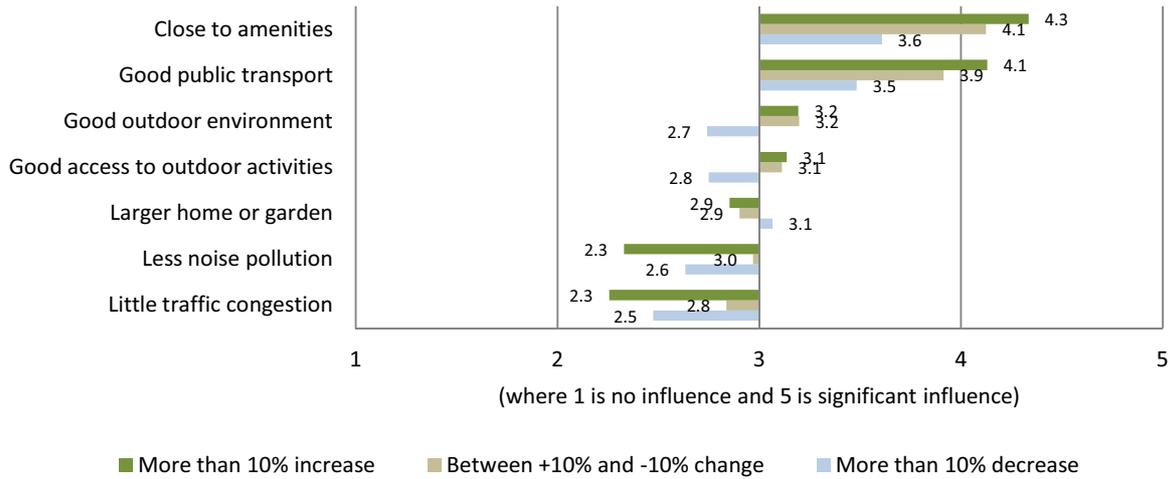
Analysis by age and SEG

Comparison by age reveals that younger respondents are more strongly influenced by proximity to amenities and the public transport network (*see* Figures 9.6 and 9.7). Size of house/garden, access to outdoor activities and a good outdoor environment were rated most highly by those aged between 36 and 65.

ABC1 respondents are more likely to indicate that they are influenced by the size of house/garden compared to those from C2DE groups (*see* Figures 9.8 and 9.9). External factors, such as satisfaction with the outdoor environment, were also deemed to be more important by ABC1 respondents.

Figure 9.6: Influence of physical factors by age (BLGD residents)

(where 1 is no influence and 5 is significant influence)

■ 18-35　■ 36-65　■ 66 and over

53
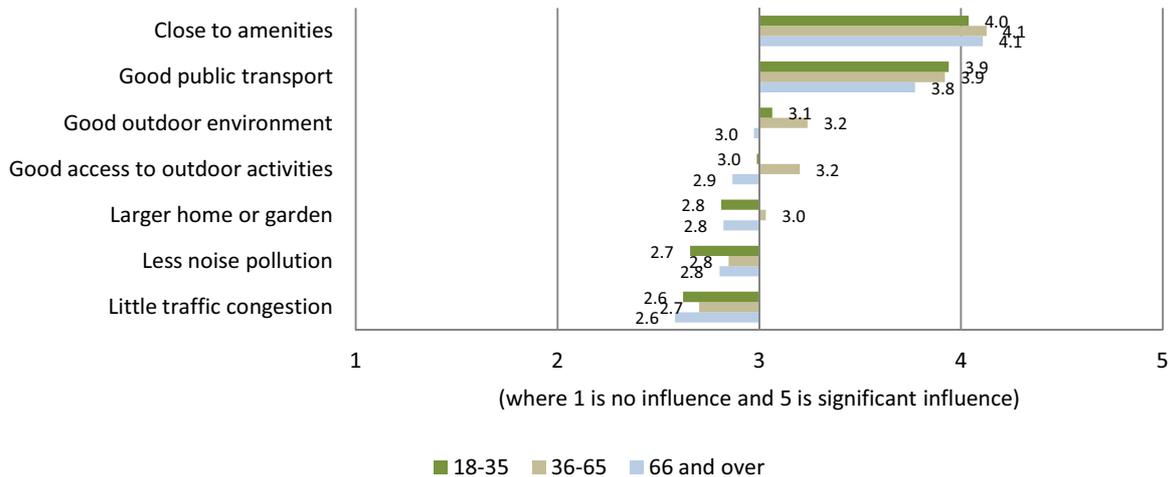
Figure 9.7: Influence of physical factors by age (BMA residents)

(where 1 is no influence and 5 is significant influence)

■ 18-35   ■ 36-65   ■ 66 and over
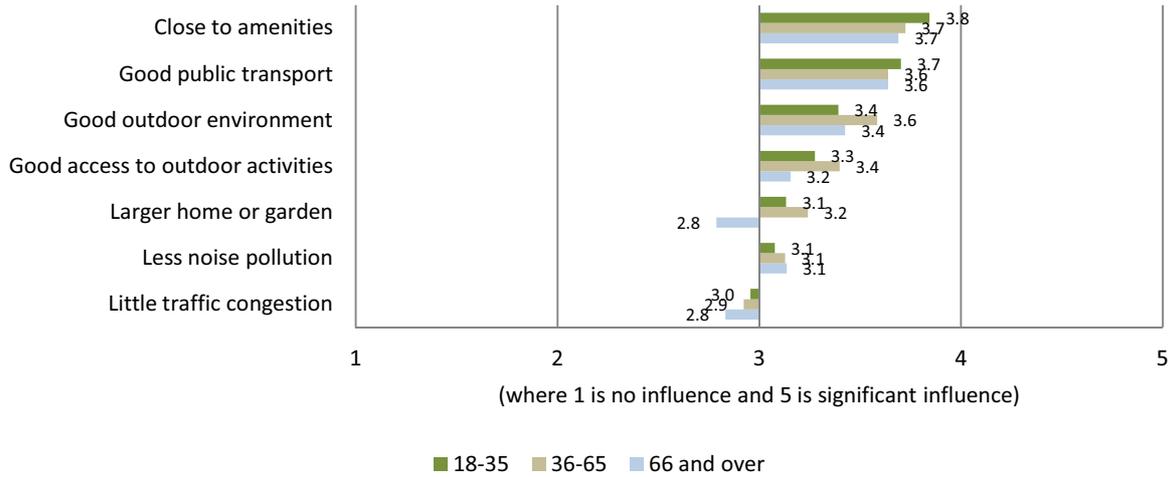
Figure 9.8: Influence of physical factors by socio-economic group (BLGD residents)

(where 1 is no influence and 5 is significant influence)

■ ABC1   ■ C2DE
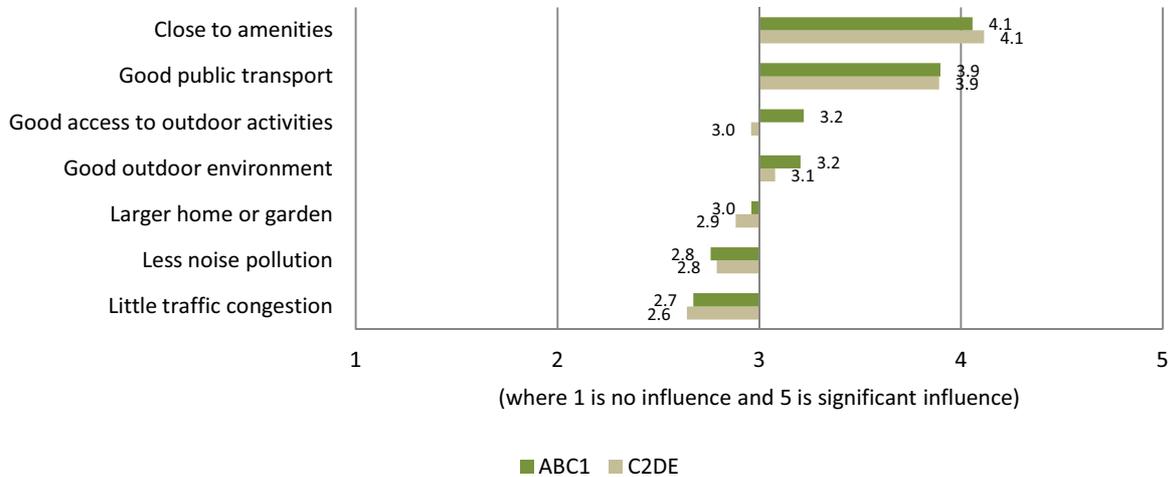
Figure 9.9: Influence of physical factors by socio-economic group (BMA residents)

(where 1 is no influence and 5 is significant influence)

■ ABC1   ■ C2DE

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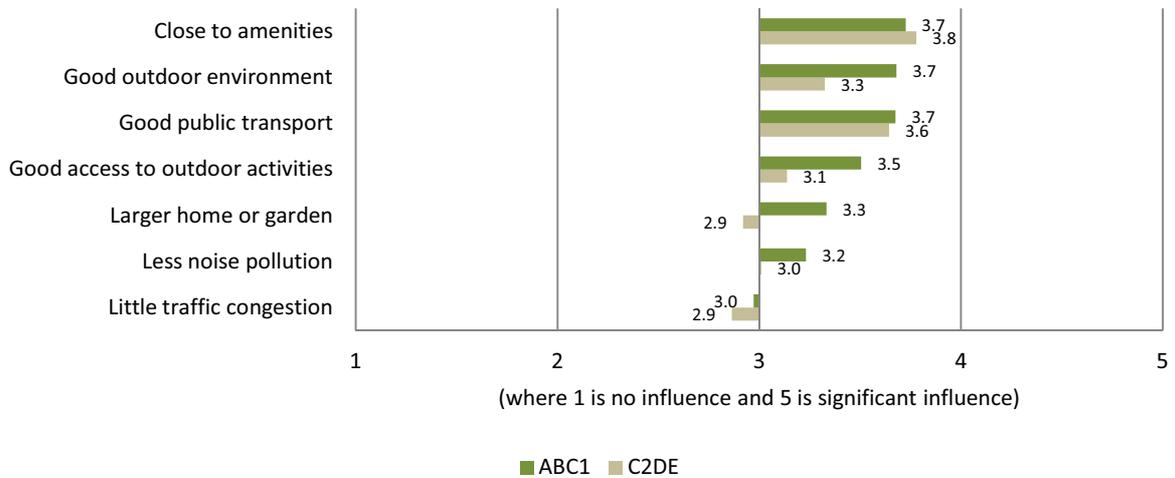
Intention to live in Belfast City Council

Respondents were asked whether they can see themselves living in Belfast City Council in five years time. Those who currently reside in Belfast and do not envisage that they will live there in the future, are more likely to be influenced by a larger house/garden (average score 3.1 compared to 2.9 by those who intend to continue living in Belfast). This group of respondents also indicated that they would like to live in an area with less traffic congestion.

Contrastingly, those who reside outside the city yet envisage living in Belfast in five years time, are more likely to be influenced by the public transport network (average score 3.8 compared to 3.6 for those who do not intend to continue living in Belfast).

Figure 9.10: Influence of physical factors by intention to continue living in Belfast (Belfast council residents)

Close to amenities: 4.1 / 4.1
Good public transport: 3.9 / 3.8
Good outdoor environment: 3.1 / 3.1
Good access to outdoor activities: 3.1 / 3.1
Larger home or garden: 2.9 / 3.1
Less noise pollution: 2.8 / 2.7
Little traffic congestion: 2.6 / 2.8

(where 1 is no influence and 5 is significant influence)

■ Yes ■ No

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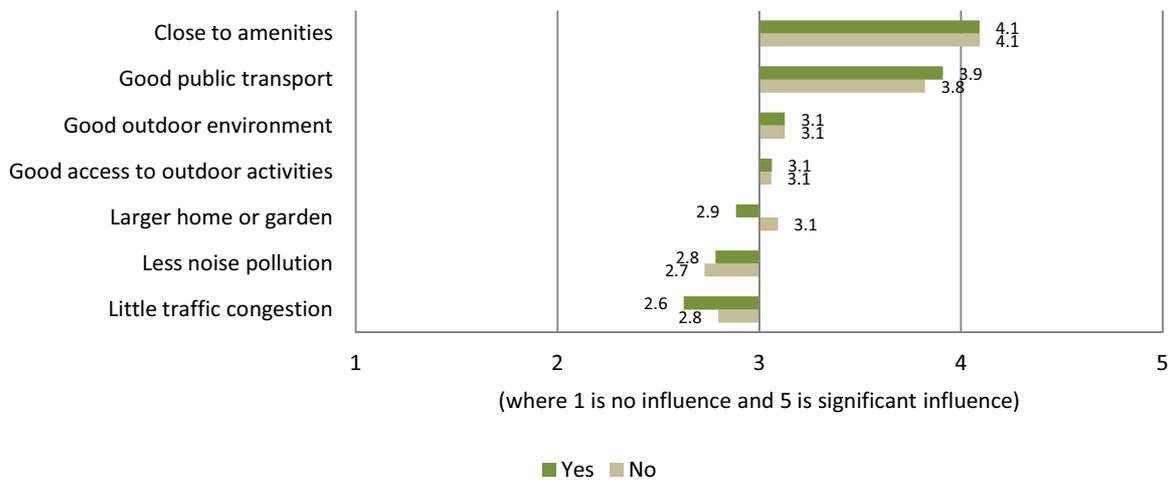
Figure 9.11: Influence of physical factors by intention to live in Belfast (BMA residents)

(where 1 is no influence and 5 is significant influence)

■ Yes ■ No
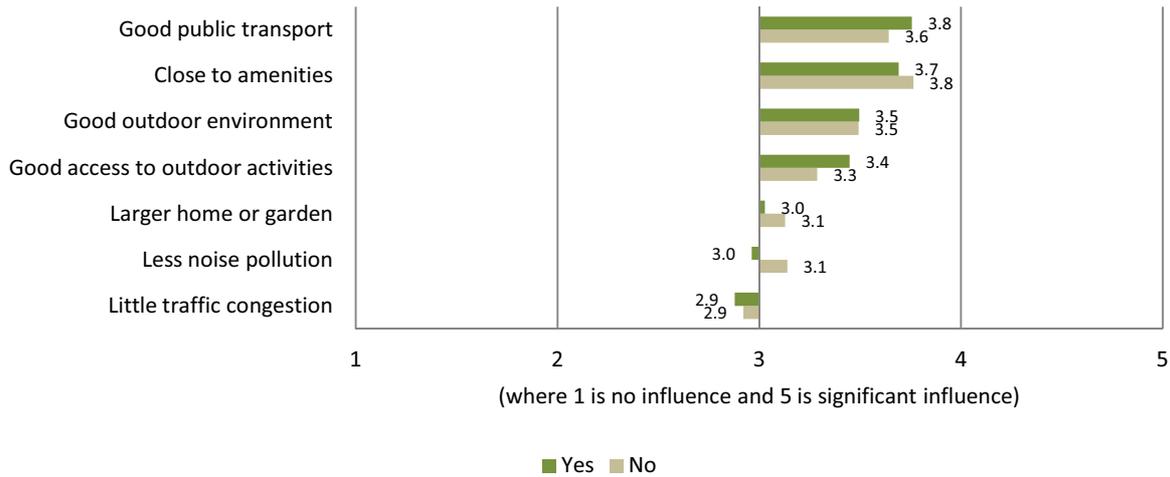
Previous experience living in Belfast City Council

Those who live in BMA, yet have previously lived in BLGD, are more likely to rate *proximity to amenities* and *transport network* more highly in terms of influence than those who have never lived in Belfast. Not surprisingly, a *good outdoor environment* (3.5), *little traffic congestion* (2.9) and *less noise pollution* (3.2) were rated more highly in terms of importance by those who have never lived in Belfast.

Figure 9.12: Influence of physical factors by previous experience living in Belfast (BMA residents)

(where 1 is no influence and 5 is significant influence)

■ Yes ■ No
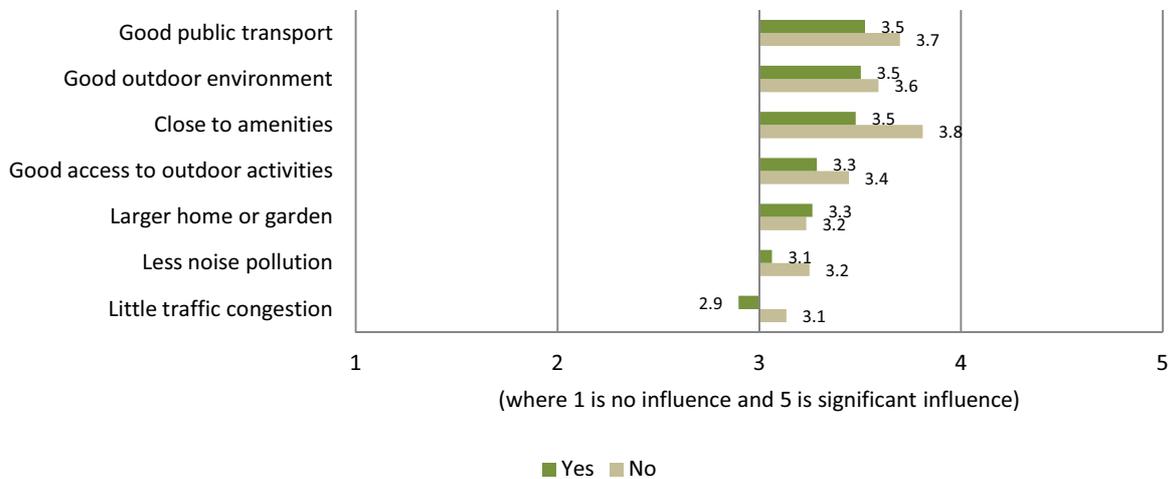
Physical push factors

This section reviews physical push factors and potential reasons which may be preventing BMA residents from moving to the Belfast Local Government District area. In addition, this section reviews push factors which may influence Belfast residents to move from the city.

Figure 9.13 suggests that *suitability of housing* has a moderate influence on why respondents from BMA do not live in Belfast (2.4). *Availability of parks and green space* also had a moderate influence on those respondents from BMA (2.3).

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Figure 9.13: Influence of physical push factors by area (BLGD and BMA residents)
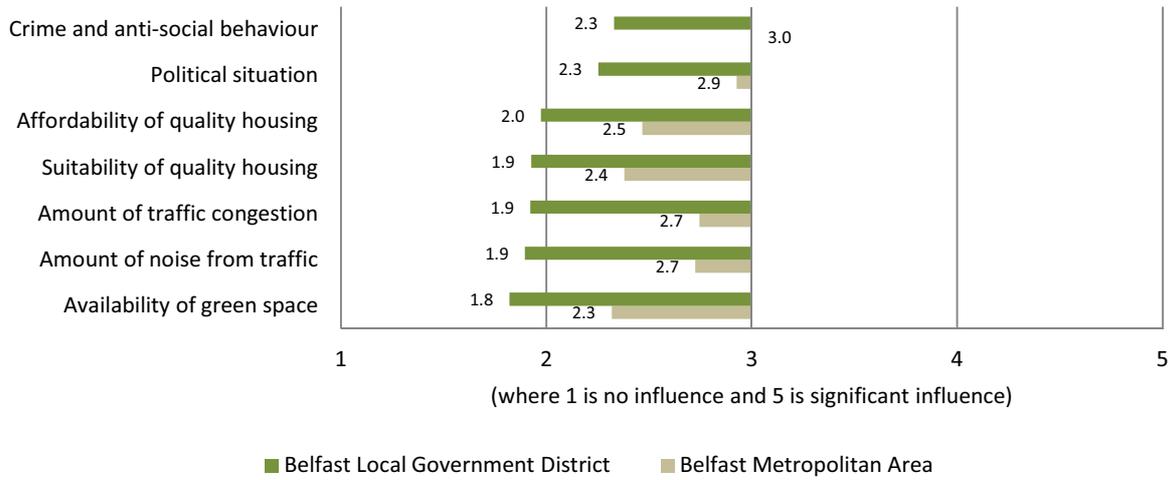
Younger respondents (2.6) (*see* Figure 9.14) and those from ABC1 groups (2.4) (*see* Figure 9.15) are more likely to highlight *housing quality* as an influence on why they do not live in Belfast.

Figure 9.14: Influence of physical push factors by age
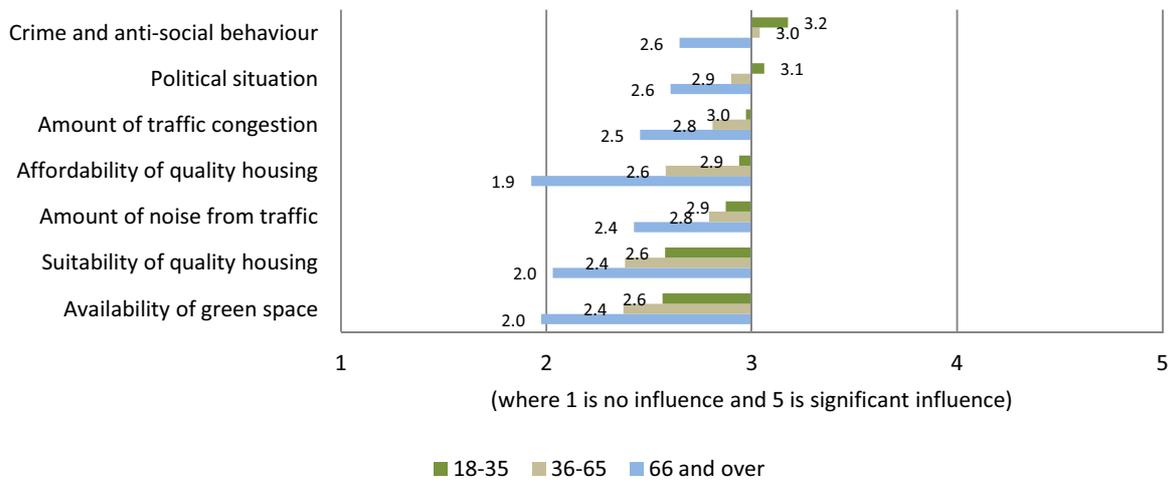
BMA respondents (2.7) stated that *traffic congestion* has an influence on why they do not live in Belfast.

Figure 9.15: Influence of physical push factors by socio-economic group

(where 1 is no influence and 5 is significant influence)

■ ABC1 ■ C2DE
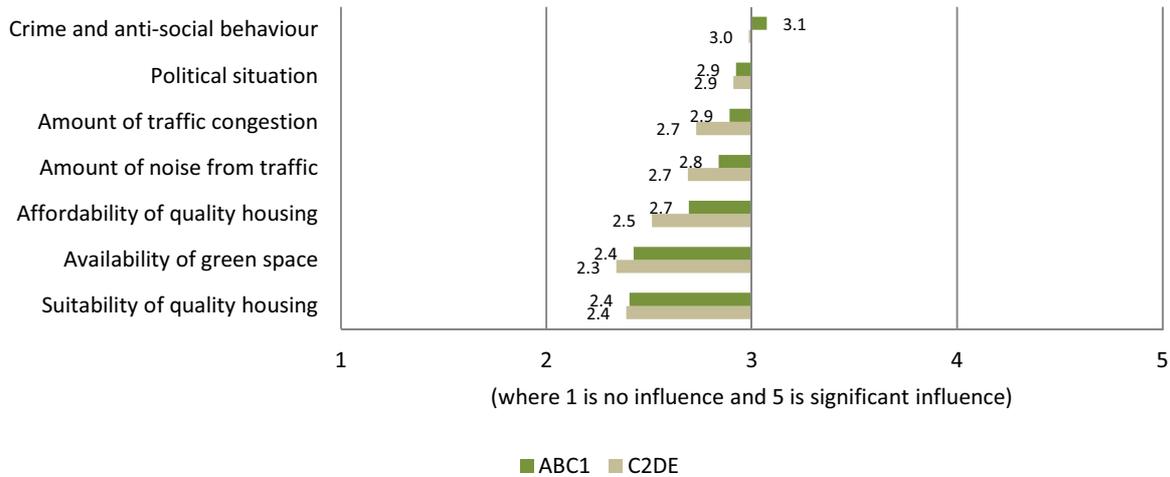
Similarly, *traffic noise* (2.7) has some influence on why they do not live in the Belfast.

Respondents who live in Belfast City Council were asked the extent to which physical push factors may influence them to move away from Belfast. *Suitability of quality housing* may have an influence on encouraging them to move from Belfast (1.9). Younger respondents (2.6) are more likely to highlight suitable housing as a push factor than those aged over 66 (2.0). Younger respondents (2.9) are also much more likely than older respondents (2.4) to indicate that noise from traffic may influence them to move from Belfast.

Social and cultural influences

This section analyses the extent to which social and cultural factors have an influence where respondents currently live.

Social and cultural pull factors

Proximity to family and friends appears to have an equal level of influence on both those who live in BMA (3.7) and BLGD (3.8). Respondents from Belfast are on average more likely to indicate that they grew up in the area (3.6) than those who live in BMA (3.2). Perhaps most interestingly, respondents from BMA are more likely to indicate that they are influenced by feeling safe (4.2) than those in Belfast City Council (3.9).

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Figure 9.16: Influence of social and cultural factors by respondent type

Feels safe in community	3.9 / 4.2
Close to family and friends	3.8 / 3.7
Grew up in the area	3.6 / 3.2
Good sense of community	3.5 / 3.4
Can get involved in community	3.1 / 3.0

(where 1 is no influence and 5 is significant influence)

■ Belfast Local Government District   ■ Belfast Metropolitan Area
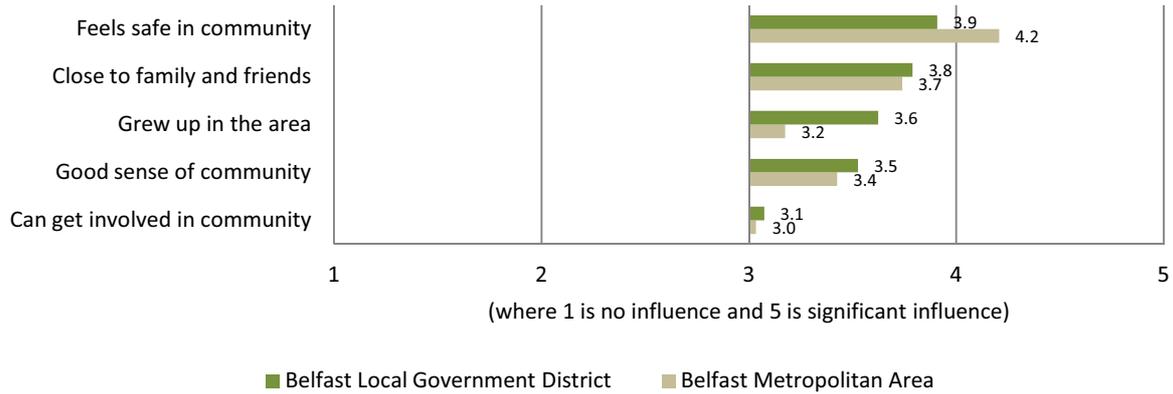
Population shift in Belfast wards

Analysis by population change reveals some interesting trends in residents' views.

Those who live in wards which have experienced population decline are less likely to report that they are influenced by a *sense of community spirit* (3.3 compared to 3.7 who live in areas of population increase) and opportunities to get involved in the local community (2.7 compared to 3.2 areas of population increase). In addition, those from areas of population increase are more likely to rate *feeling safe* as an influencer (3.9 compared to 3.6 who live in areas of population decline). Findings suggest that lack of *community spirit* and *feeling 'unsafe'* may be influencing residents to move from those areas which have experienced a decline in the past ten years.

Figure 9.17: Influence of social and cultural factors by population shift in Belfast wards

Grew up in the area	3.8 / 3.6 / 3.5
Close to family and friends	3.6 / 3.8 / 3.8
Feels safe in community	3.6 / 4.0 / 3.9
Good sense of community	3.3 / 3.5 / 3.7
Can get involved in community	2.7 / 3.1 / 3.2

(where 1 is no influence and 5 is significant influence)

■ More than 10% decrease   ■ Between +10% and -10% change   ■ More than 10% increase
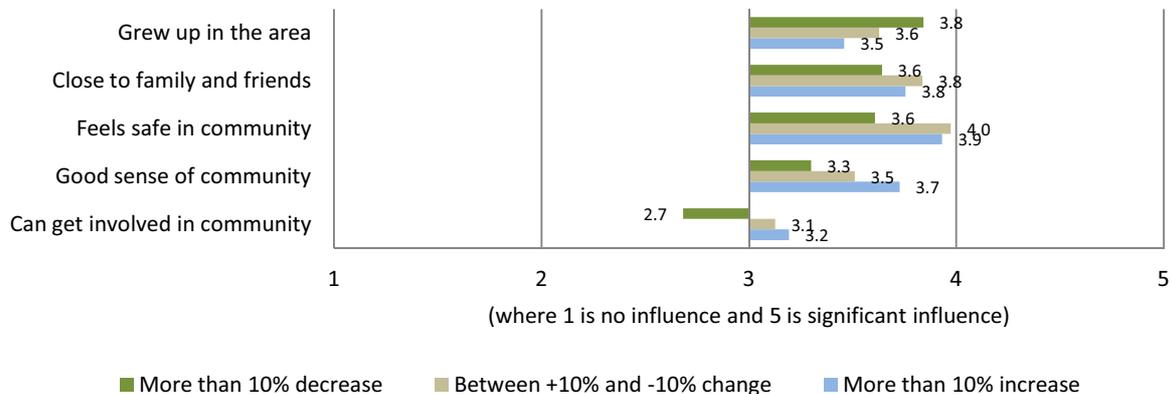
Analysis by age

Comparison by age reveals that older respondents in Belfast are more likely to be influenced by *proximity to family and friends* (3.7), *community spirit* (3.6), opportunities to *get involved in the local community* (3.2) and *feeling safe in the area* (4.0). On average, younger respondents living in Belfast rated social and cultural factors less highly than older respondents.

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(where 1 is no influence and 5 is significant influence)

■ 18-35 ■ 36-65 ■ 66 and over
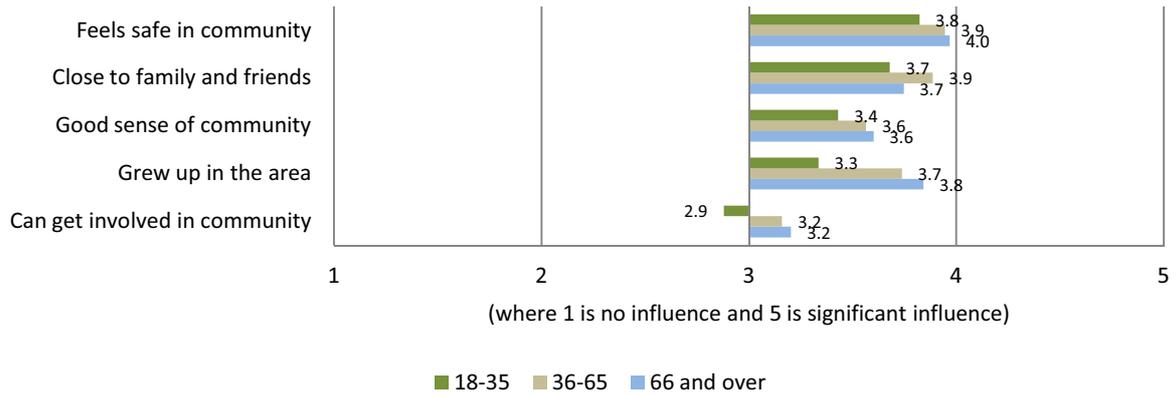
Contrastingly, younger respondents in BMA are more likely to indicate that they are influenced to live in this area due to *proximity to family and friends* (3.9) and because they *grew up in the area* (3.4). Across age bands, BMA respondents are overall more likely to indicate that they are influenced by *feeling safe* compared to Belfast residents.

Figure 9.19: Influence of social and cultural factors by age (BMA residents)

(where 1 is no influence and 5 is significant influence)

■ 18-35 ■ 36-65 ■ 66 and over

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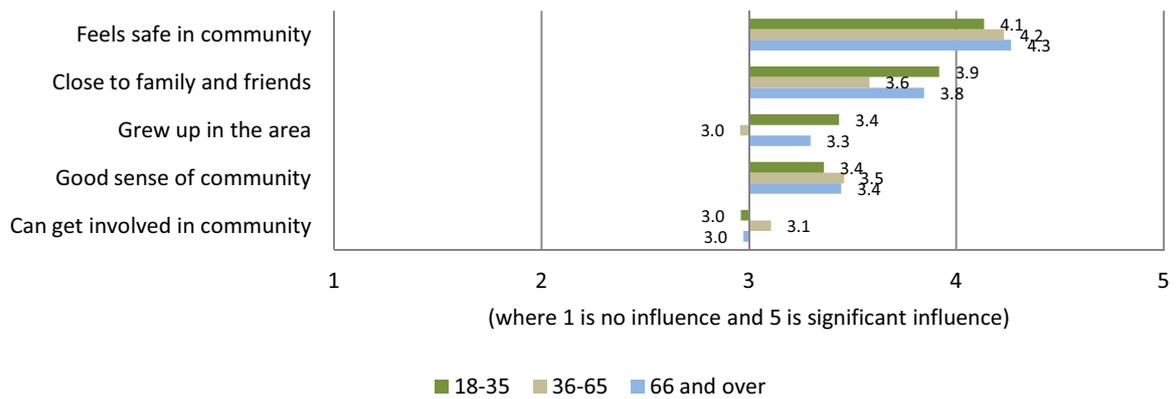
Analysis by SEG

Findings revealed little difference in feedback based on socio-economic group.

Figure 9.20: Influence of social and cultural factors by socio-economic group (BLGD residents)

(where 1 is no influence and 5 is significant influence)

■ ABC1 ■ C2DE
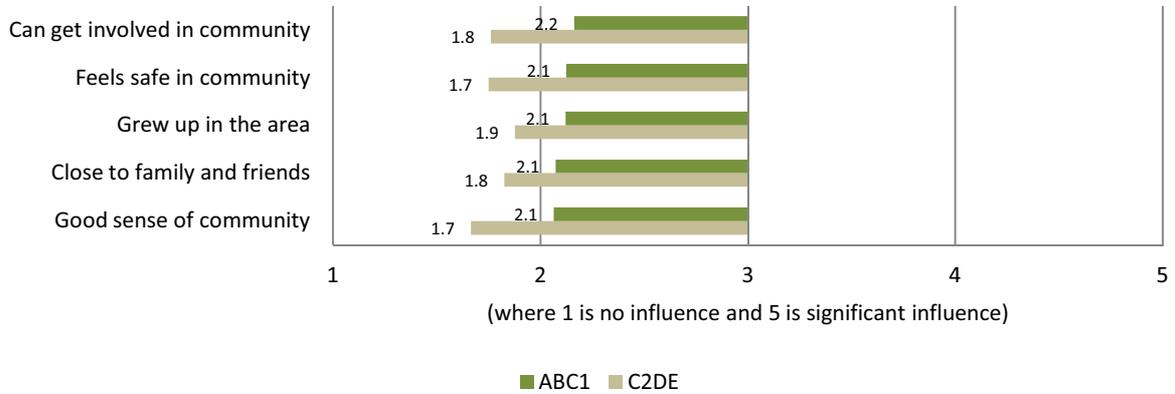
Figure 9.21: Influence of social and cultural factors by socio-economic group (BMA residents)

(where 1 is no influence and 5 is significant influence)

■ ABC1 ■ C2DE

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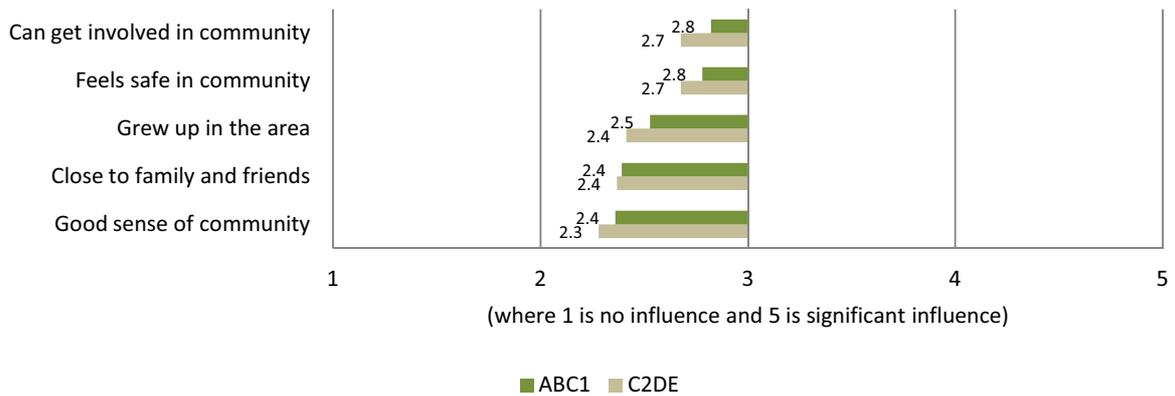
Intention to live in Belfast City Council

Those who currently reside in Belfast and do not envisage that they will live there in the future, are less likely to indicate that they are influenced by *proximity to family and friends* (3.5) and because they *grew up in the area* (3.3).

Figure 9.22: Influence of social and cultural factors by intention to continue living in Belfast (BLGD residents)

(where 1 is no influence and 5 is significant influence)

■ Yes ■ No
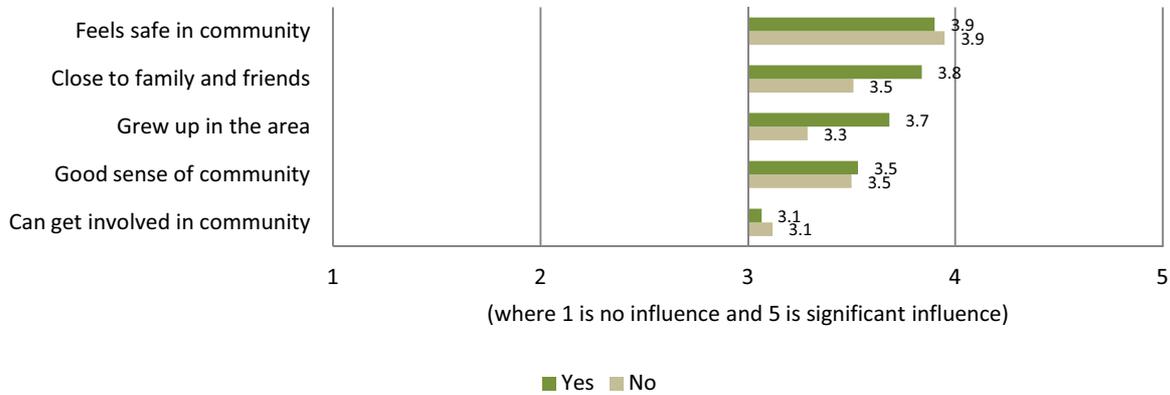
Interestingly, those who live in BMA and indicated that they do not envisage living in Belfast, are more likely to indicate that they are influenced by opportunities to get *involved in the community* (3.1) and by a *sense of community spirit* (3.4). Such findings suggest that some BMA residents believe there are fewer opportunities for community engagement in Belfast, compared to their current residency.

Figure 9.23: Influence of social and cultural factors by intention to live in Belfast (BMA residents)

(where 1 is no influence and 5 is significant influence)

■ Yes ■ No
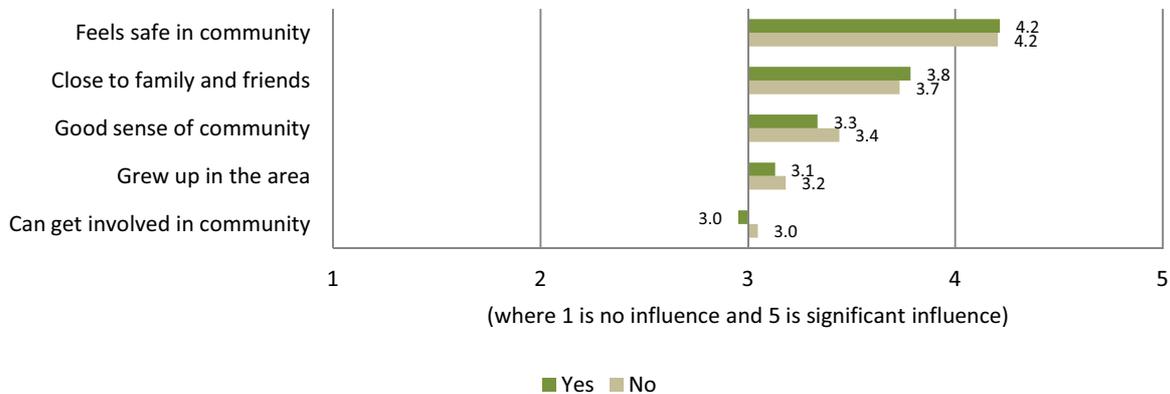
Previous experience living in Belfast City Council

Similarly, BMA residents who have previously lived in Belfast are less likely to state that they are influenced by opportunities to *get involved in the local community* (2.8) compared to those who have never lived in Belfast (3.2).

Figure 9.24: Influence of social and cultural factors by previous experience living in Belfast (BMA residents)

(where 1 is no influence and 5 is significant influence)

■ Yes ■ No
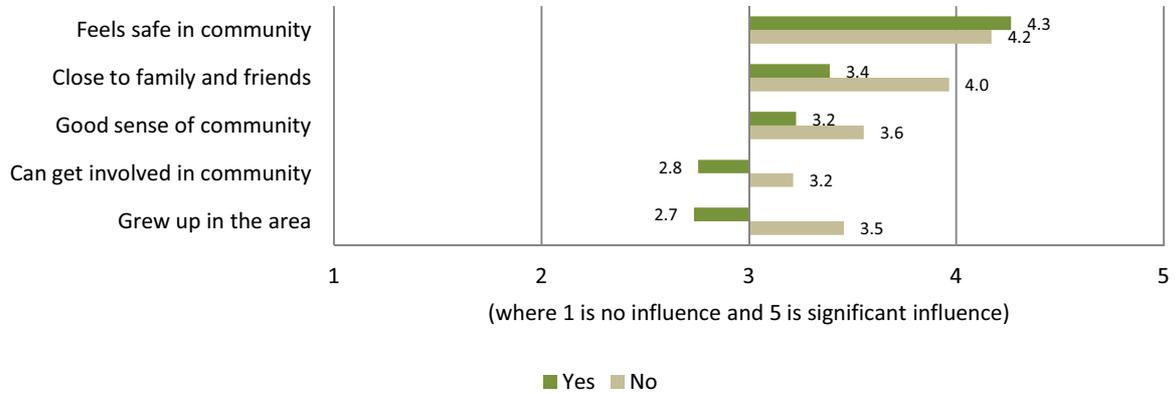
Social and cultural push factors

BMA residents (3.0) indicated that *crime and antisocial behaviour* has an influence on why they do not currently live in Belfast. Interestingly, younger respondents (3.2) are more likely to deem *crime and antisocial behaviour* to be influential than those aged 66 and over (2.6).

Figure 9.25 Social and cultural factors on not living in Belfast by area (BLGD and BMA residents)

(where 1 is no influence and 5 is significant influence)

■ Belfast Local Government District ■ Belfast Metropolitan Area
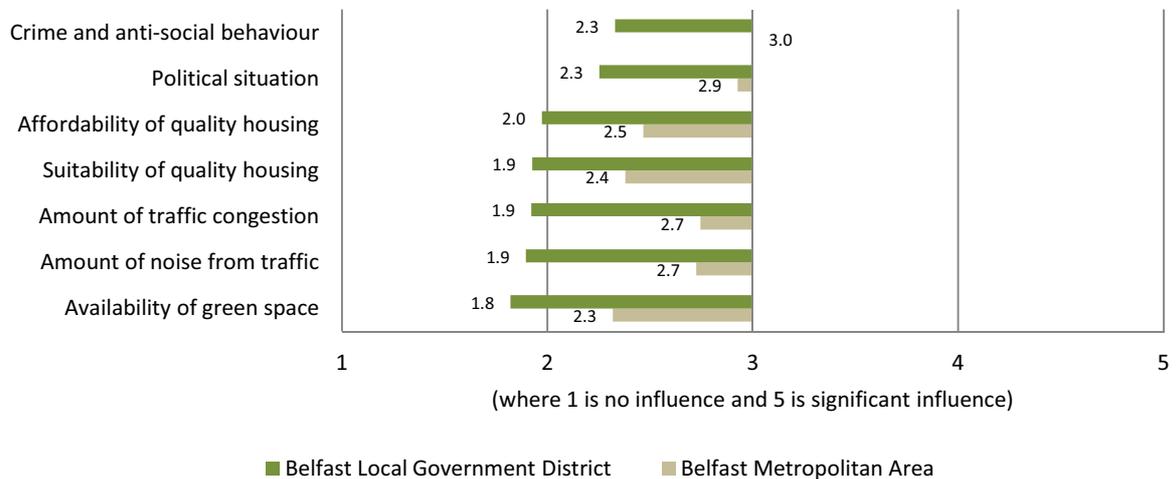
BMA respondents indicated that the *political situation* in Belfast has a moderate to significant influence on why they do not live in the area (2.9).

Figure 9.26 Social and cultural factors on not living in Belfast by age

(where 1 is no influence and 5 is significant influence)

■ 18-35   ■ 36-65   ■ 66 and over
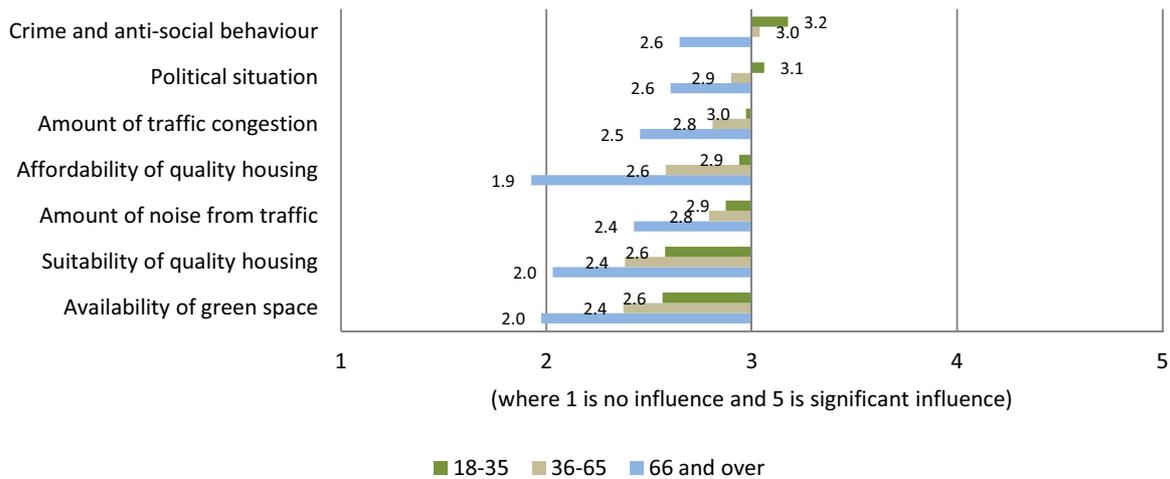
Interestingly, Belfast residents indicated that *crime and antisocial behaviour* has a similar moderate influence on why they may move from the area (2.3). Younger respondents (3.2) are much more likely to rate *crime and antisocial behaviour* highly in terms of influencing them to move from Belfast.

Figure 9.27 Social and cultural factors on not living in Belfast by socio-economic group

(where 1 is no influence and 5 is significant influence)

■ ABC1   ■ C2DE
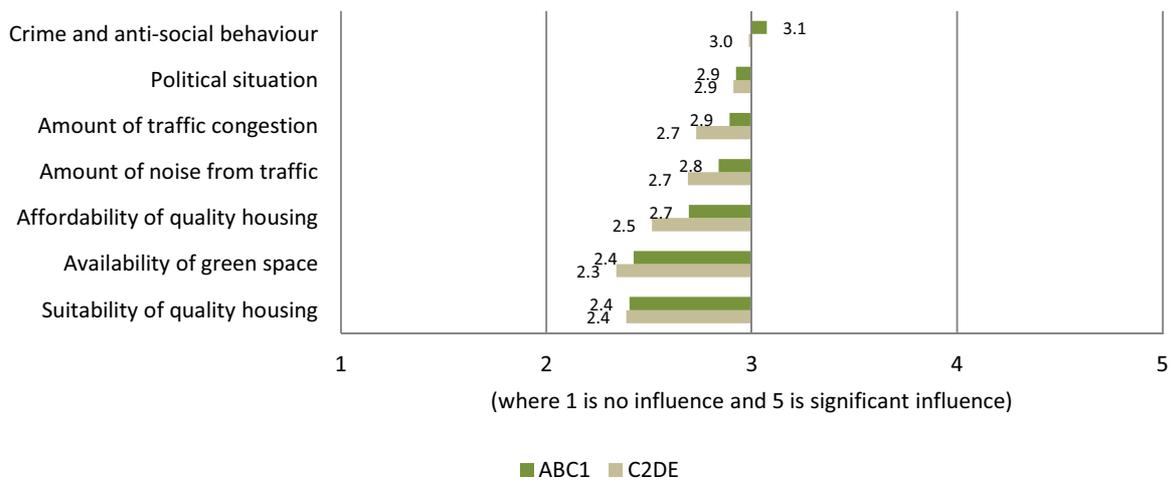
Consistent with previous feedback, younger respondents (3.2) and those from ABC1 groups (2.9) are more highly influenced by the *political situation* than older respondents (2.6) and those from C2DE backgrounds (3.0).

Economic influences

This section analyses the extent to which economic factors, such as *access to better jobs*, better *choice of schools*, and more *affordable housing*, have influenced respondents' choice of residence.

Employment status

36% of respondents from the BMA area indicate that they work full time, while 18% work part-time. This compares to 30% of Belfast City Council respondents who work full-time and 15% who are employed in part-time positions.

Figure 9.28: Employment status by respondent type

■ Belfast Local Government District   ■ Belfast Metropolitan Area
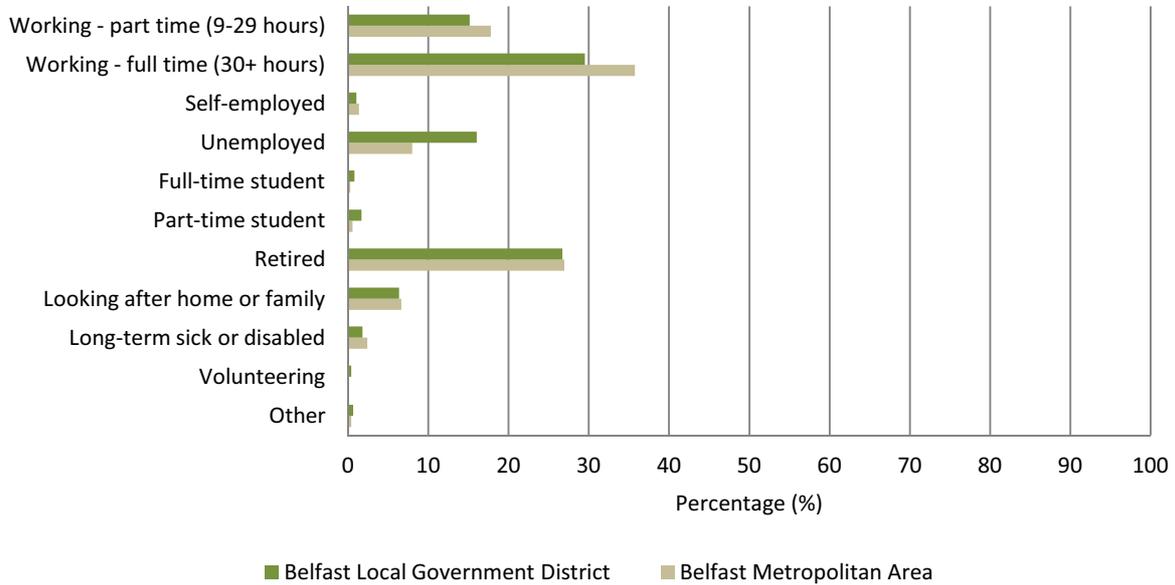
One third of respondents (33%) from BMA and who are in employment reported that they work in Belfast. Respondents from Castlereagh (54%) are more likely to work in Belfast than any other council area in BMA (*see* Figure 9.35).

A much higher proportion of BLGD residents who are in employment (80%) indicate that they work in Belfast. Findings suggest that *proximity to work* may play a role in influencing Belfast residents to live in the area.

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Figure 9.29: Incidence of working in Belfast City Council by locality
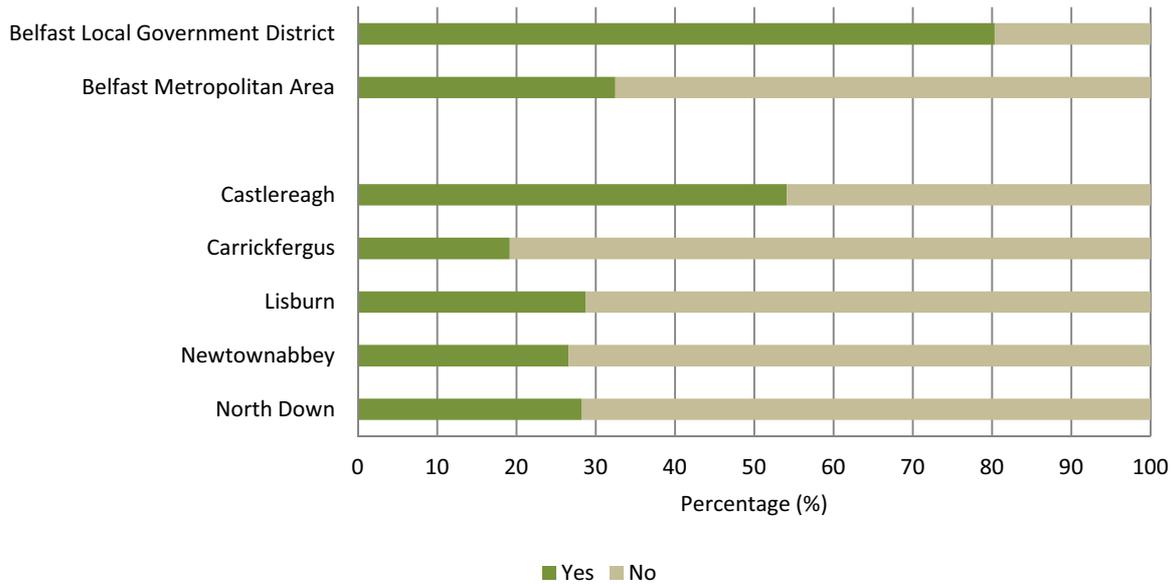
Economic pull factors

Findings reveal little difference in respondents' viewpoint based on where they currently live. On average, respondents rated the following factors similarly in terms of influence:

- *access to better jobs* (BLGD: 2.3; BMA: 2.3);
- *better choice of schools* (BLGD: 2.9; BMA: 2.9);
- *more affordable housing* (BLGD: 2.8; BMA: 2.9);
- *cost of living* (BLGD: 2.6; BMA: 2.7).

Not surprisingly, commuters are less likely to report that *proximity to work* (2.3) has any influence on where they currently live. Such respondents are more likely to indicate that they are influenced by *affordable housing* (2.9), suggesting that they are discouraged to move to Belfast due to concerns about house prices.

Figure 9.30: Influence of economic factors by locality

Market research to explore people's choices to live or move from the Belfast City Council Area – August 2013
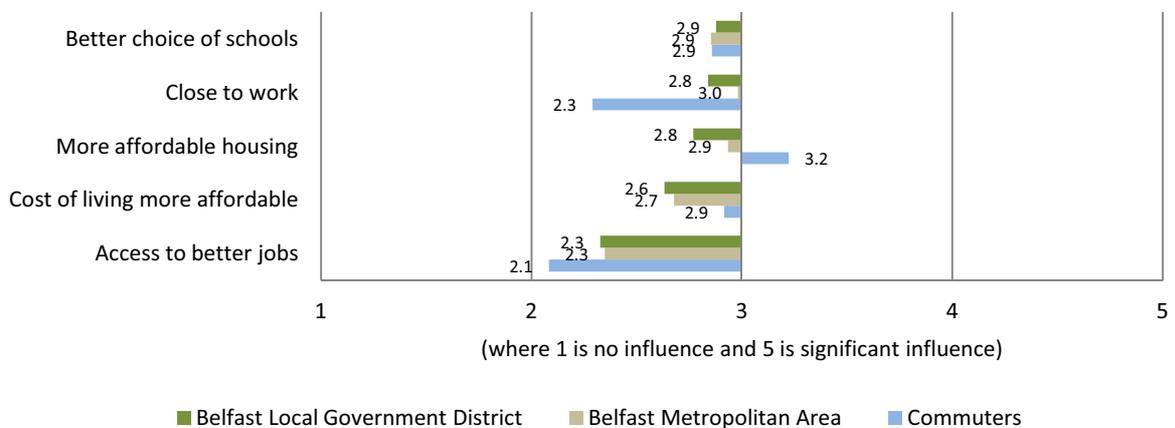
Population shift in Belfast wards

On average, respondents who live in areas of population increase are more likely to indicate that they are influenced to live in their current residence due to *access to better jobs* (2.5), *more affordable housing* (2.8) and *cost of living* (2.7). However interestingly, those who reside in areas of decline are more likely to indicate that they are influenced to live in their current residence by *better choice of schools* (3.0 compared to an average score of 2.8 who live in areas of population increase).

Figure 9.31: Influence of economic factors by population shift in Belfast wards

(where 1 is no influence and 5 is significant influence)

■ More than 10% increase   ■ Between +10% and -10% change   ■ More than 10% decrease
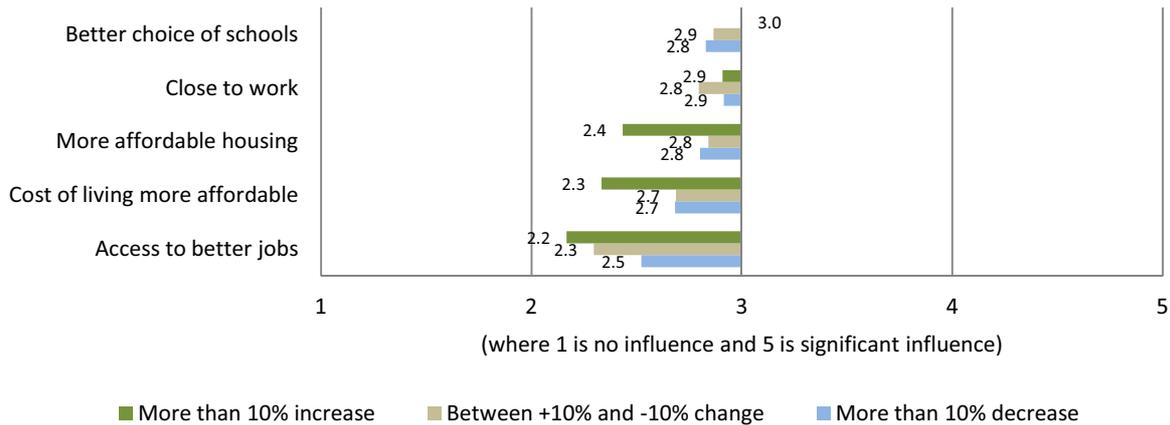
Analysis by age

Not surprisingly, those aged 18 to 35 in BLGD and BMA are more likely to report that they are influenced by *proximity to work* (3.1) and *access to better jobs* (2.5). Younger respondents also rated *affordability of housing* (2.8) more highly than older respondents (2.5). On average, younger respondents in BMA are more likely to indicate that they are influenced by *cost of living* (2.8) and *affordability of housing* (3.1) than 18 to 35 year olds in Belfast (2.8 and 2.9 respectively). Such findings suggest that young people are moving to BMA for financial reasons and that house prices may be less affordable in Belfast.

**Figure 9.32: Influence of economic factors by age (BLGD residents)**

(where 1 is no influence and 5 is significant influence)

■ 18-35   ■ 36-65   ■ 66 and over

Market research to explore people's choices to live or move from the Belfast City Council Area – August 2013
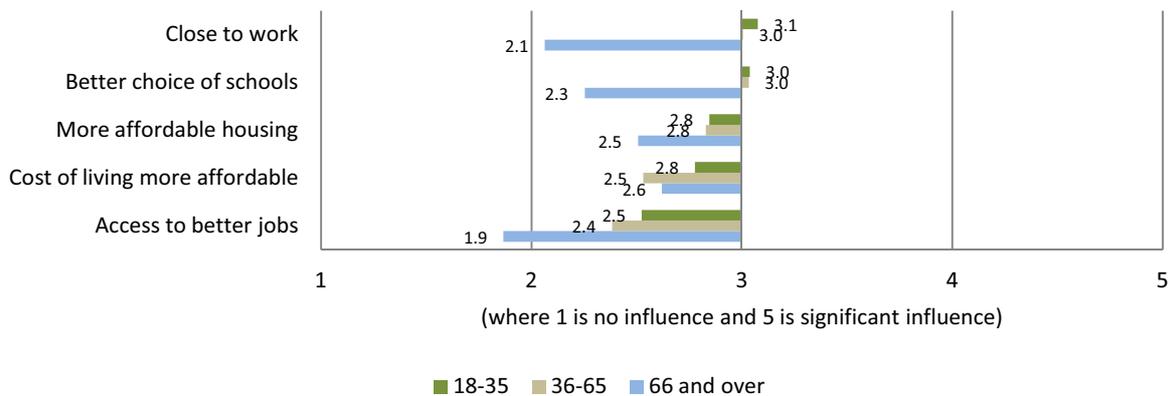
Figure 9.33: Influence of economic factors by age (BMA residents)

Close to work — 3.2 / 3.2 / 2.1
Better choice of schools — 3.1 / 3.0 / 2.1
More affordable housing — 3.1 / 3.0 / 2.5
Cost of living more affordable — 2.8 / 2.7 / 2.4
Access to better jobs — 2.5 / 2.5 / 1.7

(where 1 is no influence and 5 is significant influence)

■ 18-35   ■ 36-65   ■ 66 and over
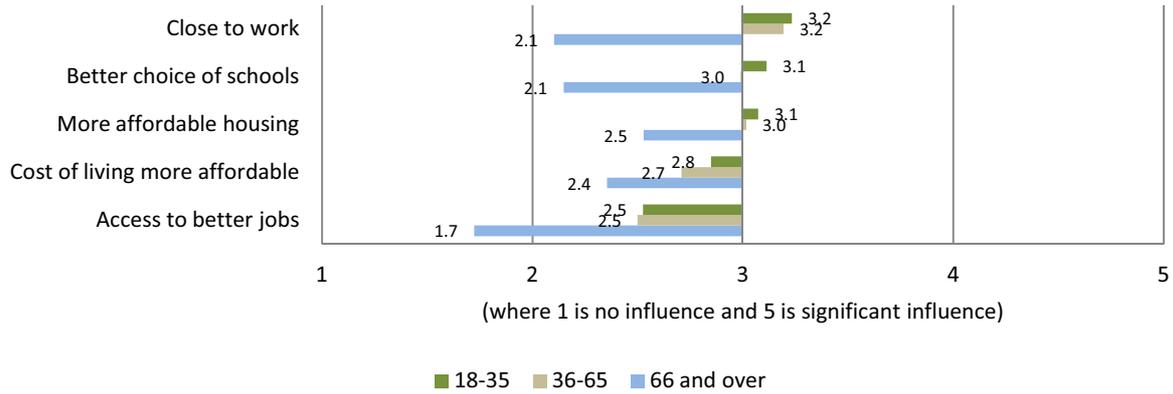
Analysis by Socio-economic groups

ABC1 respondents from both BMA and BLGD are more likely to indicate that they are influenced by *proximity to work*, *access to better jobs*, and to enable a *better choice of schools*. On average, ABC1 respondents from BMA rated *affordability of housing* more highly than C2DE residents from the same area (3.1 ABC1 compared to 2.8 C2DE).

Figure 9.34: Influence of economic factors by socio-economic group (BLGD residents)

Close to work — 3.4 / 2.5
Better choice of schools — 3.1 / 2.8
More affordable housing — 2.7 / 2.8
Cost of living more affordable — 2.6 / 2.7
Access to better jobs — 2.6 / 2.2

(where 1 is no influence and 5 is significant influence)

■ ABC1   ■ C2DE
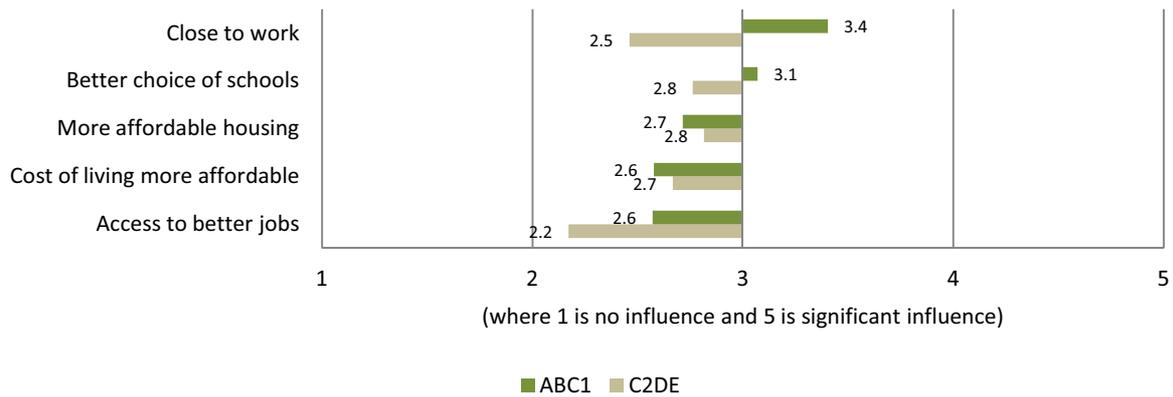
Figure 9.35 Influence of economic factors by socio-economic group (BMA residents)

Close to work — 3.2 / 2.8
More affordable housing — 3.1 / 2.8
Better choice of schools — 2.9 / 2.8
Cost of living more affordable — 2.7 / 2.7
Access to better jobs — 2.5 / 2.2

(where 1 is no influence and 5 is significant influence)

■ ABC1   ■ C2DE
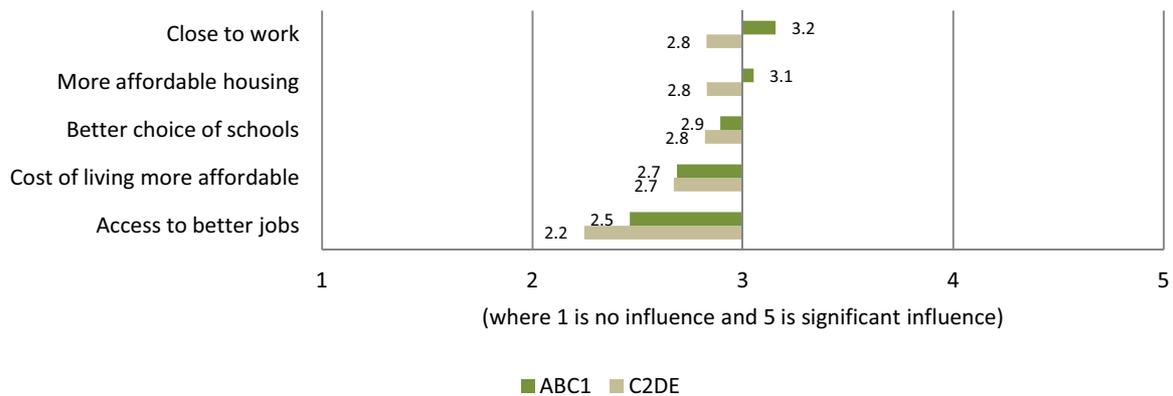
Intention to live in Belfast City Council

Perhaps not surprisingly, those who live outside Belfast, yet can see themselves living in Belfast in five years time, indicated that they are more influenced by *proximity to work*

(3.2) and *access to better jobs* (2.6) than those who live in Belfast. Findings suggest that commuters may be willing to move to Belfast to ensure proximity to work, however evidence suggests that willingness may be affected by affordability of housing.

Figure 9.36: Influence of economic factors by intention to continue living in Belfast (BLGD residents)


(where 1 is no influence and 5 is significant influence)

■ Yes ■ No
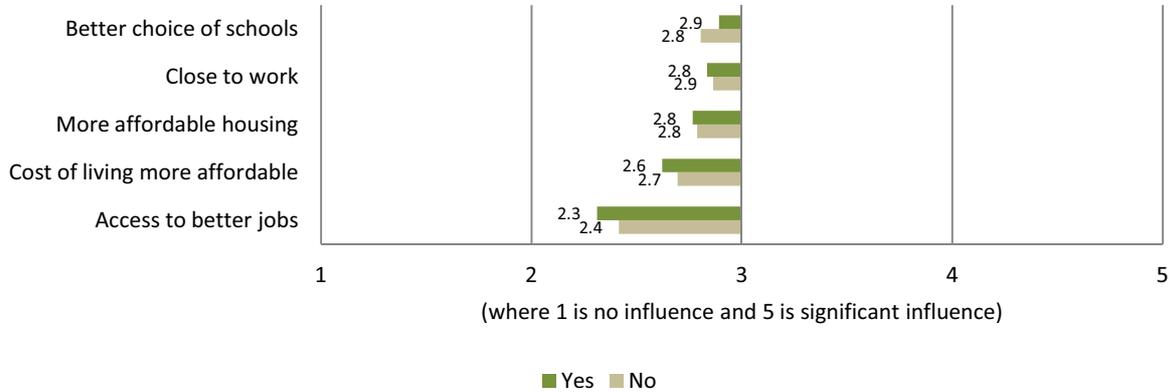
Figure 9.37: Influence of economic factors by intention to live in Belfast (BMA residents)

(where 1 is no influence and 5 is significant influence)

■ Yes ■ No
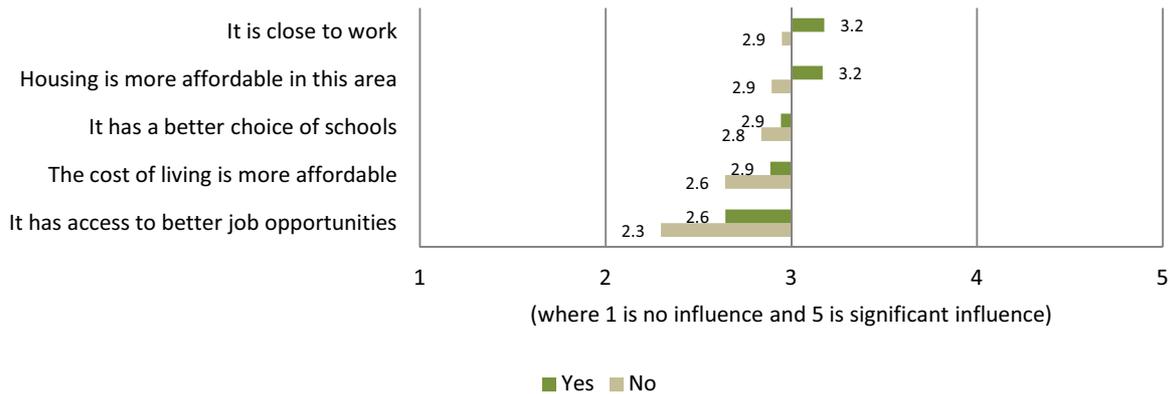
Previous experience living in Belfast City Council

On average, respondents who have never lived in BMA deemed *choice of schools* (3.0) to be more influential than those who have previously lived in Belfast (2.6).

Those who have never lived in Belfast are more likely to indicate that they are influenced by affordability of housing and cost of living than those who have previously lived in Belfast.

Figure 9.38: Influence of economic factors by previous experience living in Belfast (BMA residents)

(where 1 is no influence and 5 is significant influence)

■ Yes ■ No
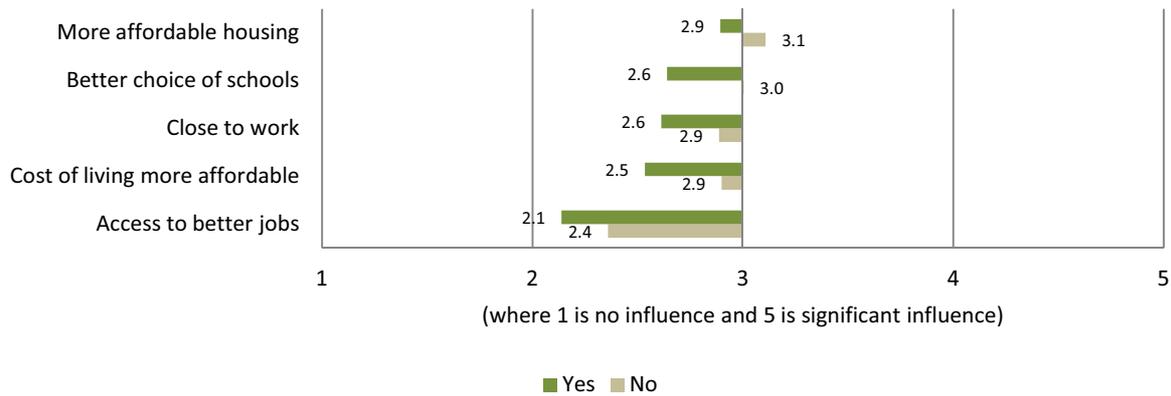
Economic push factors

BMA respondents (2.4) and commuters (2.5) indicated that *availability of affordable quality housing* has an influence on why they do not live in Belfast. Younger respondents (2.9) and those from ABC1 groups (2.4) are more likely to rate *affordable housing* as a reason why they do not live in Belfast.

Figure 9.39: Influence of affordable quality housing on not living in the Belfast area by area (BMA residents and commuters)

(where 1 is no influence and 5 is significant influence)

■ Belfast Metropolitan Area ■ Commuters

Market research to explore people's choices to live or move from the Belfast City Council Area – August 2013
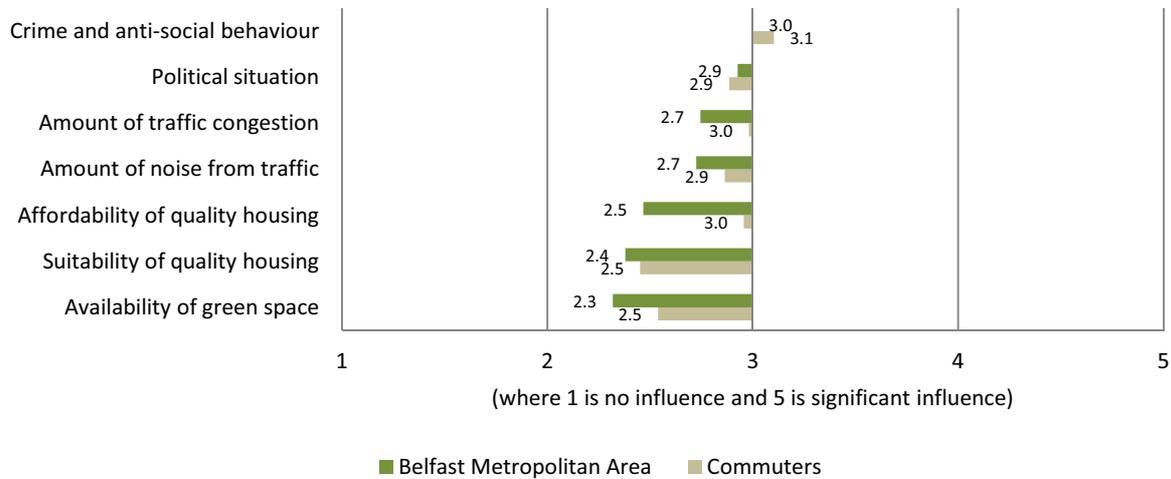
Figure 9.40: Influence of affordable quality housing on not living in the Belfast area by age

(where 1 is no influence and 5 is significant influence)

■ 18-35 ■ 36-65 ■ 66 and over
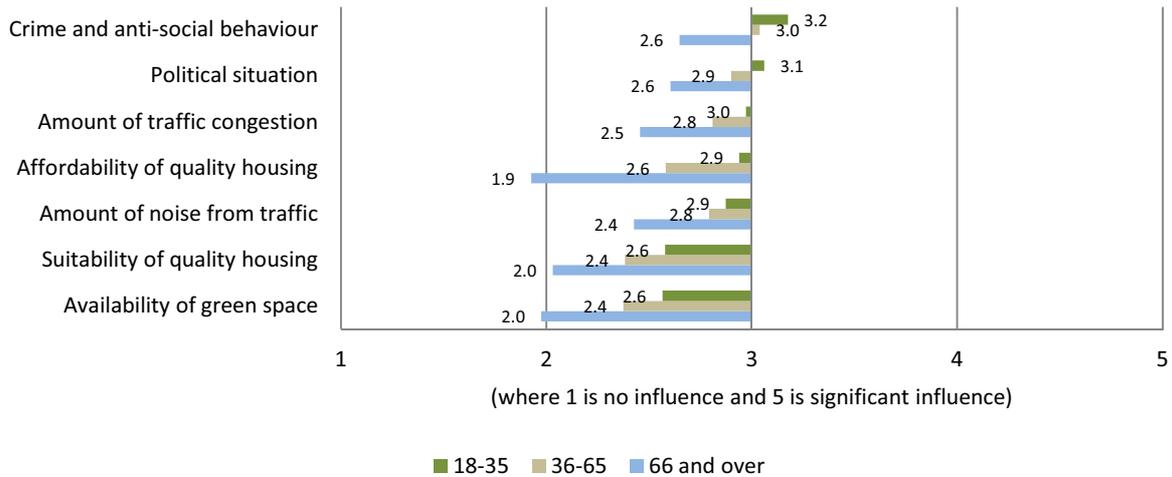
Figure 9.41: Influence of affordable quality housing on not living in the Belfast area by socio-economic group

(where 1 is no influence and 5 is significant influence)

■ ABC1 ■ C2DE
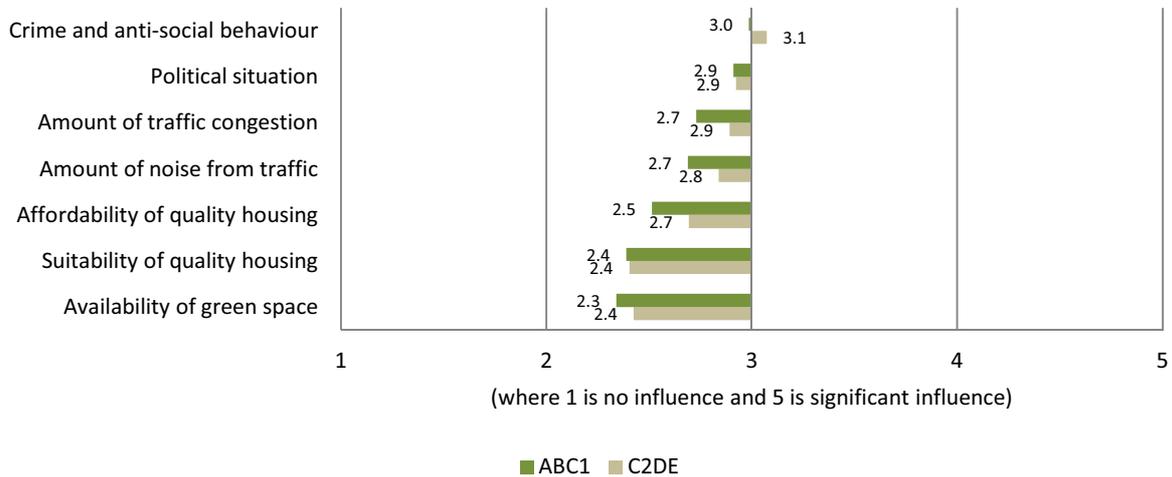
BLGD respondents (2.0) indicated that *affordable quality housing* may have an influence on whether they will move from the area. Also, young respondents (2.3) from Belfast noted that affordable quality housing was moderately influential, especially when compared to age groups.

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Figure 9.42: Influence of affordable quality housing on moving from the Belfast (BLGD residents)

(where 1 is no influence and 5 is significant influence)

■ Belfast Local Government District
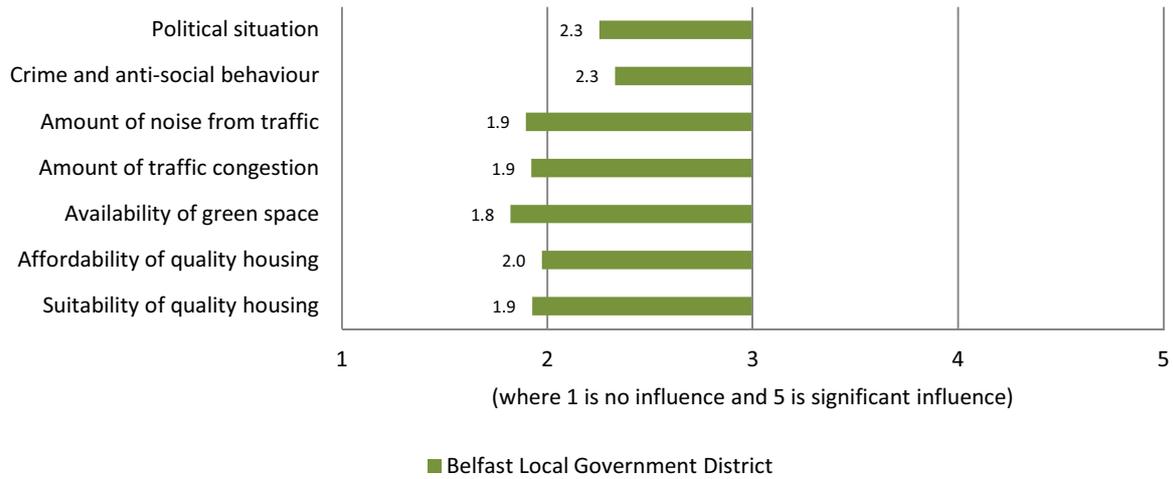
Figure 9.43: Influence of affordable quality housing on moving from the Belfast by age (BLGD residents)

(where 1 is no influence and 5 is significant influence)

■ 18-35   ■ 36-65   ■ 66 and over
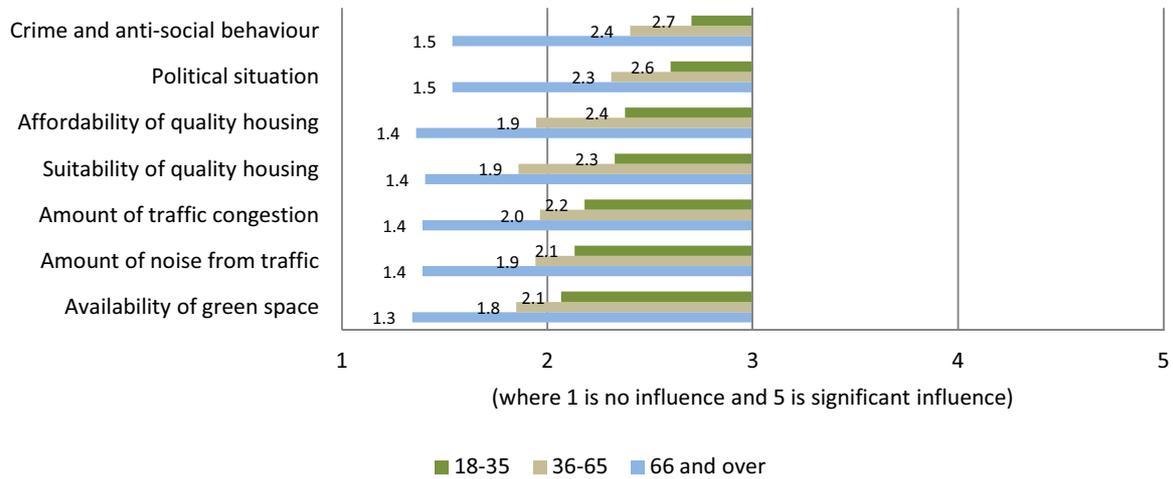
Figure 9.44: Influence of affordable quality housing on moving from the Belfast by socio-economic group (BLGD residents)

(where 1 is no influence and 5 is significant influence)

■ ABC1   ■ C2DE

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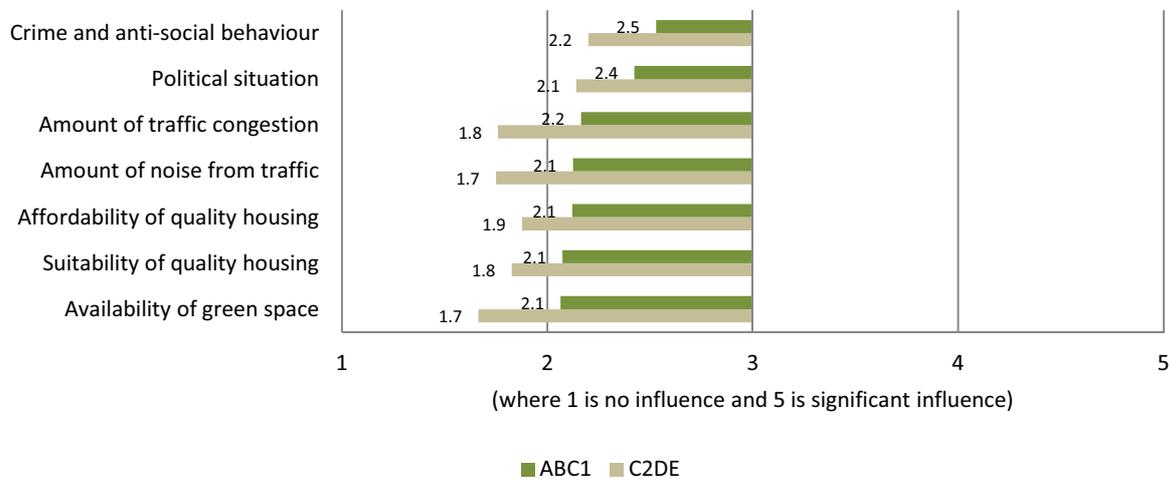
Looking ahead

Having reviewed the push and pull factors influencing respondents' choice of residence, this section evaluates respondents' intentions to continue living in Belfast City Council, or to move to the city if they currently reside outside Belfast.

85% of respondents who currently live in Belfast envisaged that they will continue to live there in five years time. Interestingly, respondents from South Belfast are less likely to agree that they will be living in Belfast in five years time. Perhaps surprisingly, those who live in wards which have experienced more than 10% decline are more inclined to predict that they will be living in Belfast compared to those from wards which have seen a population increase (88% compared to 82%).

Figure 9.45: Do you see yourself living in Belfast City Council in five years time? (BLGD residents by ward and population shift)
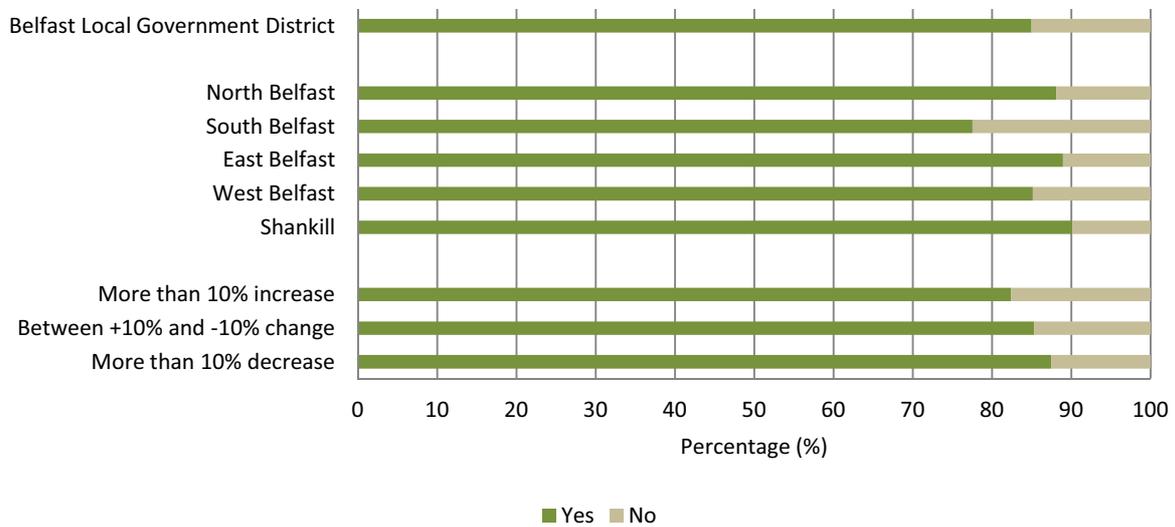
Older respondents (87%) and those from C2DE groups (86%) are more likely to indicate that they will remain living in Belfast area.

Market research to explore people's choices to live or move from the Belfast City Council Area – August 2013

Figure 9.46: Do you see yourself living in Belfast City Council in five years time? (BLGD residents by gender, age and socio-economic group)
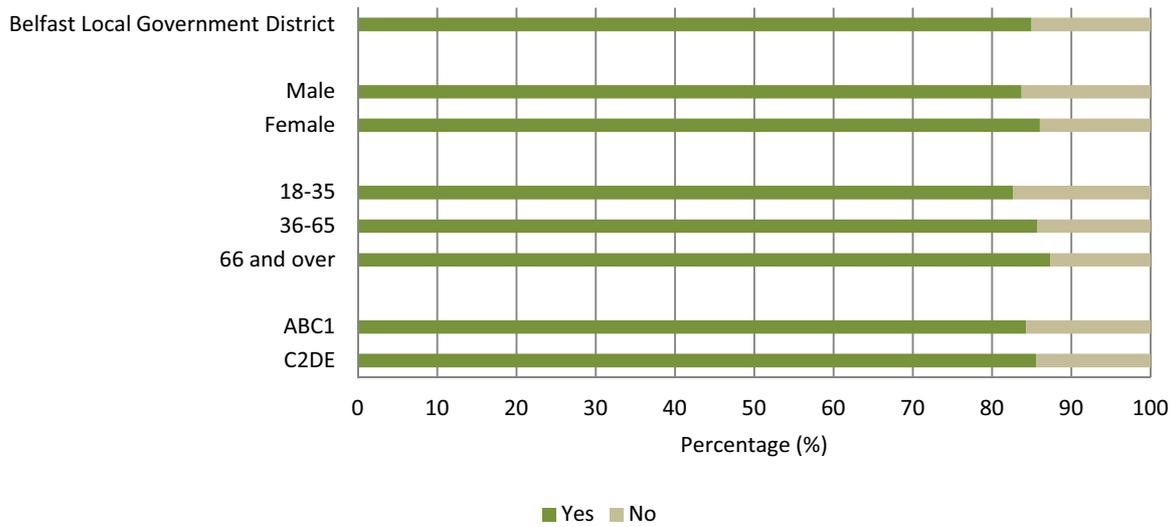

Figure 9.49 shows that only 14% of BMA residents envisage that they will be living in Belfast in five years. Younger respondents (24%) and those from ABC1 groups (17%) are more likely to predict that they will be living in Belfast area in the future.

Figure 9.47: Do you see yourself living in Belfast City Council in five years time? (BMA residents)
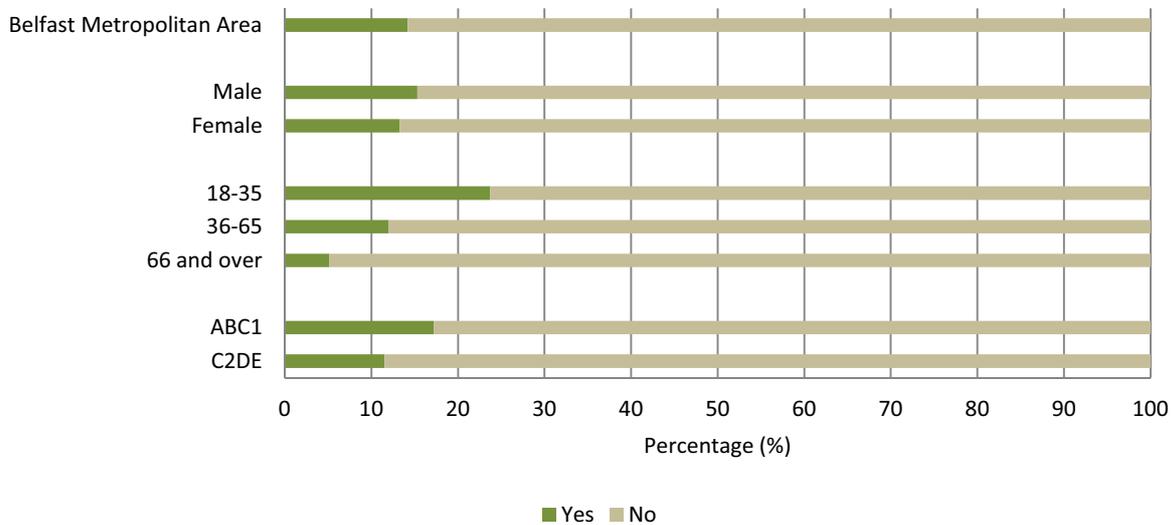
Those who reside outside Belfast were asked whether any factors would encourage them to move to the city. Almost three quarters of BMA respondents (74%) indicated that nothing would encourage them to move to Belfast. This compares to 55% of commuters.

29% of commuters stated that they may be encouraged to move to Belfast to be closer to work. The same proportion of commuters (7%) and BMA residents (7%) indicated that they would be influenced to move in the instance of more affordable housing in Belfast.

Market research to explore people's choices to live or move from the Belfast City Council Area – August 2013

Figure 9.48: Analysis of key factors which may encourage respondents to move to Belfast City Council

Market research to explore people's choices to live or move from the Belfast City Council Area – August 2013
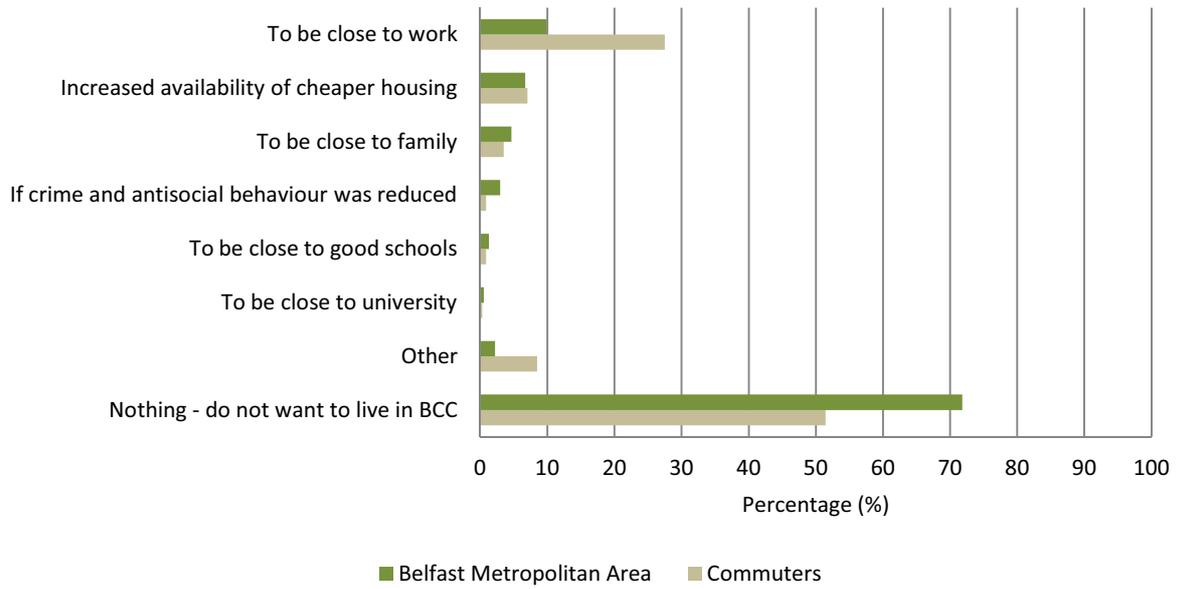
Conclusion

In conclusion, this document has reviewed several policy interventions adopted over the last decade, some of which have been developed in order to attempt to stem the population decline in Belfast City Council. These include strategic policies to enable regeneration and stimulate population growth, such as the Belfast Metropolitan Area Plan 2015 and the Belfast Masterplan 2004-2020. Steps have been taken to tackle disadvantage and deprivation within 15 neighbourhoods in the Belfast City Council area, through the Neighbourhood Renewal scheme. Furthermore previous research[48] has provided insight into Belfast residents' views of their local area; with 84% (*source:* Belfast City Council Residents Survey) indicating that they were satisfied with their neighbourhood.

Despite such findings, trend data illustrates that Belfast has experienced a population lag[49] in the past decade, whilst surrounding council areas in the Belfast Metropolitan area have witnessed an increase. Lisburn, North Down and Carrickfergus districts have experienced a substantial increase in the number of households (11.1%, 9.6% and 8.7% respectively) in comparison to the Belfast and Castlereagh districts (0.9% and 0.8%). Previous publications, referenced in this document provide some insight into the factors which may have contributed to the decline. Findings from the attitudinal survey reinforce previous research and provide clarification to the questions posed at the beginning of the research.

What is the profile of those leaving Belfast?

The attitudinal survey indicates that those who previously lived in Belfast City Council are primarily in the middle to older age bracket (between 36 and 66+ years), and are more likely to be from ABC1 social groups. Such respondents are also more likely to currently reside in Castlereagh, North Down or Lisburn. Overall, the majority of such respondents tended to live in Belfast City Council over twenty years ago, however over one quarter (27%) indicated that they moved from Belfast in the past ten years.

What is the profile of those who may move to Belfast City Council?

14% of all BMA residents surveyed indicated that they envisage living in Belfast in five years time. Almost one quarter of such respondents were in the younger age category (18 to 35 years) and were from ABC1 groups. Such respondents are less likely to indicate that they grew up in BMA than those from the same area who have no intention to move to Belfast City Council. Physical factors, such as proximity to amenities and better public transport network, appear to have an influence on respondents' inclination to move to the city.

85% of Belfast residents envisaged that they would continue living in Belfast in five years time. Findings revealed little difference based on age or social class. Interestingly, those

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[48] Belfast City Council Residents Survey (2010)

[49] A population's lag phase is the period when the population size remains constant

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who live in South Belfast and in areas which have witnessed population increase are less likely to believe that they will be living in Belfast in the future.

Analysis by population shift across wards in Belfast provides some insight into why certain areas (i.e. Andersonstown, Upper Springfield and Woodvale) have experienced a population decline of more than 10% in the last decade. Respondents from these wards are less likely to state that they are influenced by physical factors such as proximity to amenities, good public transport network and access to outdoor activities. Analysis of social and cultural factors provides interesting insight on the population decline. Respondents from Andersonstown, Upper Springfield and Woodvale are less likely to state that they are influenced by a sense of community spirit, opportunities to get involved in the local community and by feeling safe compared to those who live in wards which have experienced a population increase. The survey suggests that population may be retained in these areas by addressing concerns in relation to safety and providing more effective opportunities for community engagement.

What factors have contributed to the population decline in Belfast City Council?

Further analysis of push and pull factors provides some insight into the reasons why respondents may have moved from Belfast City Council. House size and type appears to have an influence on why residents have moved from the area. The survey reveals that Belfast residents are much more likely to live in terraced housing than their BMA counterparts. Those from BMA were also more likely to indicate that they have been influenced to live in their current residence due to the size of the house or garden. House size and type appears to be a particular influence for younger respondents in both Belfast City Council and BMA; with both indicating that suitability of quality housing may play a role in influencing them to move from their current residence.

Exploration of social and cultural factors also provides an indication of why respondents may be moving from Belfast City Council. BMA residents are much more likely to report that they have been influenced to live in their current residence in order to gain a sense of community spirit and become involved in the local community. Findings suggest that respondents may be more encouraged to move or remain in Belfast if they felt a better engagement with the community.

The influence of crime and anti-social behaviour was also highlighted within the survey. BMA respondents were more likely to indicate that they are influenced by feeling safe in their neighbourhood compared to Belfast residents. Almost half of BMA residents indicated that they do not live in Belfast City Council due to crime and anti-social behaviour; a sentiment which was specifically highlighted by younger respondents. Similarly, younger respondents who currently live in Belfast were most likely to indicate that they may be influenced to move from the area as a result of crime and anti-social behaviour.

Such findings are echoed within previous research. A Belfast City Council consultation (*My City: My Neighbourhood 2010*) highlighted that residents would like a decrease in anti social behaviour in Belfast City. In addition, published data from the *Neighbourhood*

Renewal Outcome Indicators Report (2012) illustrates that neighbourhoods in the Belfast area continue to experience some of the highest levels of anti-social behaviour and substance related deaths.

Survey findings also revealed that the political situation[50] in Belfast may be preventing people from moving to Belfast. 42% of those surveyed in BMA indicated that the political situation has a high influence on why they do not currently live in Belfast. In addition, over a quarter of Belfast residents indicated that they want to move from the city due to the political climate.

Economic factors, such as affordability of housing and cost of living, also appear to be preventing people from moving to the city. 30% of BMA residents and 45% commuters stating that availability of affordable housing has an influence on why they do not live in Belfast City Council. Such findings reiterate feedback from the *Residents Survey (2007)*, which indicated that Belfast respondents were dissatisfied with the lack of affordable housing and cost of living in the area.

Key recommendations to retain and increase population in Belfast

To conclude, the survey findings, in conjunction with previous research publications, provide insight into the factors which may be contributing to population decline in Belfast. Overall, findings suggest that there may be merit in targeting the younger generation (aged 18 to 35 years) who currently reside in Belfast and in the surrounding areas. For this group are most likely to state that they would be willing to move to the city, while Belfast residents aged 18 to 35 are also more likely to report that they may move from the city in five years time. The younger generation in Belfast seem to be much more likely to move from the city due to crime and antisocial behaviour and the political situation in Belfast. Contrastingly, older Belfast residents appear less concerned with such political and social factors, suggesting that they have become accustomed to such considerations over the years.

In some ways, it is difficult to provide a conclusive list of recommendations to retain and increase the population in Belfast, particularly as 74% of BMA residents indicated that nothing would encourage them to move to Belfast. However, comparison of respondents' feedback in relation to push and pull factors provides insight into ways in which Belfast City Council could combat this decline:

▪ Address concerns in relation to crime and antisocial behaviour in Belfast, with the aim to improve residents' sense of safety and reduce negative perceptions of crime and social division in Belfast;
▪ Continue to enhance and regenerate open spaces to ensure greater availability/access to green space and improved opportunities for physical activity. In addition, ensure further promotion and publicity raising of green spaces in Belfast;

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[50] It should be noted that the survey was conducted not long after the protests in relation to the removal of the Union Flag at Belfast City Hall. Therefore, it is possible that this may have had a slight influence on respondents' viewpoints.

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- Where possible, support, advocate and adopt plans for the development of affordable housing;
- continue to publicise and actively promote positive aspects of Belfast and city living which are deemed to be attractive, such as:
  - proximity to shops, entertainment and other local amenities;
  - access to job opportunities/employment in the City; and
  - the reliability and affordability of the public transport network.
- encourage community spirit and support opportunities for community engagement, particularly in areas of population decline;
- utilise the research to inform the ambitions and delivery of Local Government Reform and the Belfast City Masterplan.

A number of the strategic documents referenced in this report including: the Community Safety Strategy 2012-2017; Culture & Arts Framework 2012-15; Economic Strategy for NI 2011-15 and the Housing Strategy for NI 2012-17, incorporate plans which may address some of the concerns highlighted by the population research. For example, the Community Safety Strategy (2012-2017) has plans in place to ensure safer, shared and confident communities in Northern Ireland. When implemented, this should have a significant impact on antisocial behaviour, thus alleviating residents' concerns and potentially facilitating increased community interaction.

The Cultural Framework for Belfast is likely to boost employment opportunities in the area and increase the profile of the area. Similarly, it should act as a promotional tool, highlighting the positive aspects of Belfast and City living.

Finally, the primary focus of the Northern Ireland Housing Strategy (2012 – 2017) is to ensure that everyone within Northern Ireland is given the opportunity to secure good quality housing at a reasonable cost. This may have an impact on the number of people choosing to live in Belfast City. As these strategic policies are implemented and embedded this may have an influence on increasing the population of Belfast City Council.

Appendix 2:   Summary Actions for Belfast City Council to support population growth and city development

The research provides an evidence base to help guide the delivery of a number of strands of work for the Council. The following actions are in addition to the key lobbying and leadership roles that the Council plays.   It should be noted that the following actions also support the delivery of key Council plans/strategies such as the Corporate Plan and Investment Programme.

Research Recommendations	Key actions for BCC to lead on
Physical Transformation – improving connectivity, transport and physical infrastructure	- Increasing awareness of the quality and location of parks and open spaces
	- Continue to deliver Renewing the Routes programme 2012-2015
	- Commission a city centre regeneration strategy, in partnership with DSD
	- Delivery a programme for the removal or upgrade of approximately 50 derelict or ruinous properties throughout the city
	- Developing a student housing strategy on behalf of the city
	- Co-ordinate BCC responses on strategic planning / transportation issues
Transforming ambitions / perceptions - tackling anti-social behaviour and concerns about safety/political situation in Belfast	- Improve community safety and tackling anti-social behaviour through safer neighbourhood officers and plans for north, south, east and west Belfast
	- Undertake the agreed programme of work in the Interface Programme as part of the Peace III plan
	- Continue to develop the multi agency Integrated Area Intervention Programme in Lower Falls/Divis and capture the learning outcomes for future working
	- Deliver the Good Relations Programme
	- Creating strong neighbourhoods by resourcing support for community development local activity, supporting volunteering activity and increasing usage in community centres and other facilities
	- Deliver Council's contribution to major events and an annual programme of events to promote the city

	- Market Belfast by supporting the activities of Visit Belfast
	- Continue the investment in the cultural and arts scene in Belfast through City of Festival and Creative Legacies

	- Develop an Integrated City Marketing strategy, which includes:
	    - The development of a city narrative, which is agreed by all stakeholders.
	    - A refreshment of the City Brand ensuring it reflects the city's ambitions, its values and narrative, which is collectively owned by the city's stakeholders.
	    - Agreed target audiences, product development priorities, marketing materials and communication channels, including a strong digital, on-line presence.
	    - Agree the optimum structures for co-ordinated marketing of the city.

Transforming services – promoting Belfast's employment opportunities and availability of amenities	- Provide targeted business support interventions to improve business competitiveness
	- Develop and implement a city wide retail support plan
	- Raise awareness of the opportunities and stimulate demand for Superconnected Broadband amongst the business community and administer the voucher scheme to help with connection costs
	- Develop and deliver the Integrated Economic Strategy for the city

As noted in the full report, key strategic documents which the Council has a key role influencing or delivering through partnership, such as the Community Safety Strategy 2012-2017; Culture & Arts Framework 2012-15; Economic Strategy for NI 2011-15 and the Housing Strategy for NI 2012-17, incorporate plans which may address some of the concerns highlighted by the population research. For example, the Community Safety Strategy (2012-2017) has plans in place to ensure safer, shared and confident communities in Northern Ireland. When implemented, this should have a significant impact on antisocial behaviour, thus alleviating residents' concerns and potentially facilitating increased community interaction.

The Cultural Framework for Belfast is likely to boost employment opportunities in the area and increase the profile of the area. Similarly, it should act as a promotional tool, highlighting the positive aspects of Belfast and City living.

Finally, the primary focus of the Northern Ireland Housing Strategy (2012 – 2017) is to ensure that everyone within Northern Ireland is given the opportunity to secure good quality housing at a reasonable cost. This may have an impact on the number of people choosing to live in Belfast City. As these strategic policies are implemented and embedded this may have an influence on increasing the population of Belfast City Council

Agenda Item 6a

Report to:	Development Committee
Subject:	City Dressing Plan 2013 to 2014
Date:	17 September 2013
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	At the Development Committee held on 13 April 2013; Members approved the *Patterns of the City* Belfast City Dressing Plan. The Plan launched in 2011, is a cross community tourism project and an initiative which ensures our city is visually and colourfully animated using lamp post banners in the city centre and on arterial routes throughout the year.
1.2	The Belfast Tourism Destinations identified in the Integrated Strategic Framework 2010 to 2014 are included in the city dressing development plan.
1.3	A City Dressing Steering Group overseas the implementation of the annual plan and identifies key events and themes.

2	**Key Issues**
2.1	Image Zoo, a private company, is contracted by Belfast City Centre Management (BCCM) to sell/hire city dressing sites within the city centre/retail boundary (approximately 150 lamp posts). These sites are open to events and appropriate commercial companies and campaigns. Image Zoo and BCCM generate income from this scheme. A legal agreement has been drawn up between BCC and BCCM which extends the hire scheme to agreed sites beyond the city centre boundary. Events which merit and have a budget to dress areas beyond the city centre must be agreed in advance by Council and the Steering Group. In these cases, Image Zoo will generate income from hire with a percentage going to BCC. Income will be minimal, however costs will support ongoing city dressing maintenance costs.
2.2	Image Zoo has developed a discounted hire rate for the Belfast Festivals forum and for Belfast City Council civic events.
2.3	Several Community Groups have approached BCC with interest in extending *Patterns of the City* into their neighbourhoods. There is no budget or resources to implement City Dressing in areas outside of the locations identified in the

	Tourism Strategy. Having considered these requests, it would not be feasible for the Tourism, Culture, Heritage & Arts (TCH&A) unit to extend the campaign. However if there are future development of new patterns to dress BCC recommend that these areas influence the development of new patterns and that community representatives will be invited to take part in future patterns of the city workshops.
2.4	BCC would propose to offer community groups with the resources to pursue city dressing an advisory and consultation assistance through the production of a fact sheet and best practice guide for implementation. It should be noted that there are specific requirements and agreements to be put in place to ensure dressing complies with health and safety regulations and that banners are appropriately insured against loss, theft, damage or injuring the general public.
2.5	The patterns of the city banners are not time bound, however the quality of the banners will deteriorate and budget will be required to replace and refresh current banners as well as maintain the infrastructure and hardware. In addition the banners carry the B brand and the outdated gotobelfast.com website address. It will be necessary to reprint such banners to ensure new website is included.

3	Resource Implications
3.1	Budget agreed via departmental budget of £80K.

4	Equality and Good Relations Considerations
4.1	New banner designs will be equality Screened.

5	Recommendations

5.1	Members are asked to agree the following actions
	
	Engage community groups in new pattern development workshops and integrate into city dressing scheme.
	  – Share good practice fact sheets on design and installation of city dressing.
	  – Adopt updated City Dressing Policy.

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

7	Key to Abbreviations
BCC – Belfast City Council TCH&A – tourism, Culture, Heritage and Arts BCCM – Belfast City Centre Management	

8	Documents Attached
Appendix 1 – Updated draft City Dressing policy	

Appendix 1

Docs: 152367

City Dressing Policy

Objectives of the City Dressing Steering Group

To oversee the implementation of City Dressing across Belfast and ensure that it fully reflects the Belfast Brand. This includes campaigns in addition to the City Patterns concept. All designs should communicate a great sense of energy, innovation and vibrancy.

<u>Remit of City Dressing</u>

- ensure that city dressing provides sense of welcome;
- ensure that city dressing provides information in a stimulating way;
- ensure that city dressing creates a feel of a special occasion across the city or one of the destinations;
- ensure that city dressing arouses curiosity in an appealing way;
- Each organisation works together for the greater good of the city.

<u>Belfast City Dressing Tourism Place Destinations</u>

City Centre
Queen's Quarter
Gaeltacht Quarter
Shankill
East Belfast
Cathedral Quarter

<u>Belfast City Dressing Draft Policy</u>

Belfast City Council (BCC) will manage and implement the delivery of the generic City Patterns and Winter Pattern campaigns across agreed arterial routes and tourism place destinations.

1. Belfast City Centre Management will manage commercial campaigns and these will <u>only</u> be permitted in the areas managed by Belfast City Centre Management. Commercial campaigns must follow template/ design guidelines agreed by BCC and the City Dressing Steering Group.
2. When BCCM sites are not hired, Patterns of the City or Winter banners will be the default position.
3. Through a Legal Agreement, BCCM contractor will remove, store and install patterns of the city during the period of the contract.
4. <u>Major events</u> that can clearly demonstrate the ability to attract international media coverage (MTV EMAs, Olympics, World Police and Fire Games, Giro Italia, Tall Ships 2015) and can secure <u>international footfall</u> into the city will have access to agreed city dressing sites beyond the immediate city centre. Proposals will be reviewed by the City Dressing Steering Group and a collective decision reached.
5. BCCM will manage city wide event campaigns under a legal contract and SLA with BCC which ensure:
   o Campaigns must be formally shared with the City Dressing Steering Group in advance of the campaign start date.

Docs: 152367

- o BCCM must ensure that all proposed commercial dressing artwork has been equality checked, shared and approved by the Department of Regional Development and approved by the City Dressing steering Group.
- o The above proposals will also require political approval and at least a 6 month notice in advance of campaign start date.

6. BCCM will pay BCC income for sites managed by BCC; this will go towards maintenance costs and subsidizing dressing in other areas of the city.
7. Organisations seeking to hire banners will be directed to BCCM as the first point of contact.
8. Brands and companies that do not deliver the Belfast brand or may be inappropriate in the city will not be permitted. This includes the sponsorship of these companies of campaigns. e.g. drinks brands/companies.
9. Promotions (e.g. two for one offers, advertising promotions) will not be permitted for city dressing.
10. Policy acknowledges and includes the BCCM Banner Policy agreed with DRD.
11. Advice and assistance will be offered to groups that are keen to implement city dressing in their specified locations.
12. No additional financial assistance is available from BCC TCH&A unit.

Agenda Item 6b
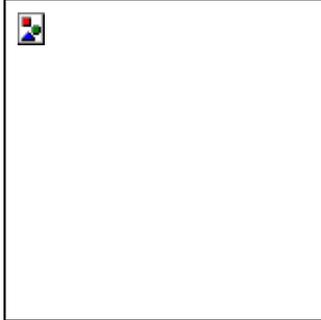
Belfast City Council

Report to:	Development Committee
Subject:	Pilot proposal to display historical material in public locations in the city
Date:	17 September 2013
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	Discussions have been held over a period round the idea of displaying museum collections in non-traditional, publicly accessible locations. At present it has not been possible to progress this project. A report was taken to Committee in November 2012 on the project and current report provides an update and suggested ways forward.
1.2	Between 1981 and 2008, 98 archaeological excavations were carried out in Belfast, and a substantial number has occurred between 2008 and 2013. While many of the excavations were passive monitoring of construction works, others have recovered interesting material, with a particular concentration in Cathedral Quarter. Most of the artefacts remain either with the excavators or in Northern Ireland Environment Agency (NIEA) stores, with a very small proportion on display in NIEA offices at Hill Street.
1.3	The artefacts tend to have modest commercial value but provide real insights into the way people lived in Belfast from the seventeenth century forward. Initial discussions have suggested that there would be little opposition to making them available for display.
1.4	It appears that there would be scope during a pilot stage possibly to mount up to four displays in Cathedral Quarter, one in Culturann, another in the Spectrum Centre and one in the new Welcome Centre.

2	**Key Issues**
2.1	As part of museum accreditation and general professional standards, there are understandably rigorous loan conditions to safeguard the museum collections, including provisions regarding security, insurance, environmental conditions and access. This makes it difficult for non-traditional venues to meet loan conditions and also certain organisational structures need be in place.

2.2	In the short term, however, there are strong arguments for progressing the making of the physical evidence for Belfast's history more accessible in public spaces, which include education, tourism and social inclusion. The new Welcome Centre has been designed with a display case already which could be used for changing displays of small objects.
2.3	Currently, most of the material recovered from excavations is in inaccessible storage. The book 'Hidden History Below Our Feet: The Archaeological Story of Belfast' in which Council was a partner, demonstrated both the richness and relevance of the archaeological heritage
2.4	Each display could consist of a simple, though robust case with integral lighting to hold one or more small objects, with appropriate labelling. There would also be an associated interpretative display panel to give the wider context. Displays would be in publically accessible places, which could either be commercial or publicly-owned premises, but either case visible from the street.
2.5	Beyond the pilot phase, if the approach is demonstrated to be viable, there may be opportunity for sponsorship and partnership support. The project might be suitable for a small-scale Heritage Lottery Fund application.

3	Resource Implications
3.1	Financial A maximum budget of £10,000 is proposed for the pilot phase.

4	Equality and Good Relations Implications
4.1	The material to be displayed will be selected to ensure that it represents our shared history and efforts will be made to maintain as far as possible a gender balance. Displays will be produced to follow best-practice accessibility guidelines.

5	Recommendations
5.1	It is recommended that Members agree: − That suitable objects for display be identified and loans agreed − That four locations are agreed with the Cathedral Quarter Trust, and that further sites in Culturann and the Spectrum Centre and the feasibility of using the same approach in the new Welcome Centre be investigated. − That a maximum budget of £10,000 is made available from the Tourism, Culture, Heritage & Arts Unit existing budget.

6	Decision Tracking
6.1	A progress report will be brought back to Development Committee in January 2014. Timeframe: January 2014　　　　　　　Reporting Officer: Shirley McCay

Docs 152366

Agenda Item 7a

Report to	Development Committee
Subject:	Loop River Licence Agreement Renewal
Date:	17 September 2013
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officer:	Cate Taggart, Community Development Manager, ext 3525

1	**Relevant Background Information**
1.1	In February 2007 the Community and Recreation Committee approved the use of the Scout Association's Courtney Hall, situated on the Cregagh Road, as alternative accommodation for Loop River Play Centre. Previously the play centre was located in Belfast City Council's Loop River Park but this was sold for housing development. The Council have occupied the Hall since 2007 and Community Services can confirm a continued need for this facility for a programme of activities during the day. Community Services have reviewed other properties in the area and have advised that this is the most suitable premises for the play centre to be located. The current Licence was renewed in July 2011 for 18 months with the play centre having use of the building during the day from Monday to Friday. This Licence has been continued on a month by month basis with the Council continuing to pay £190.00 per week as originally agreed in 2007.

2	**Key Issues**
2.1	At the Council's request the Scout Association have undertaken remedial works including removing an old ceiling and replacing lighting. These works have brought the centre up to the required health and safety standard as required by the Council's Facilities Management Unit. The Scout Association in turn have asked for a longer licence agreement than the present month by month arrangement. A further 2 year agreement from the 1 November 2013 is proposed by Community Services.

3	**Resource Implications**
3.1	The proposed licence would operate with the Council continuing to pay a rental amount inclusive of heat and electricity of £190.00 per week which will be met from within existing budgets.

Document Number: 152140

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

5	Recommendations
5.1	Note the content of the report and agree to recommend to Strategic Policy and Resources Committee that a new Licence Agreement is completed with the Scout Association for a period of 2 years from the 1 November 2013 at a cost of £190.00 per week.

6	Decision Tracking
CDM to liaise with Director of Property and Projects with a view to bringing a report to the Strategic Policy and Resource Committee in due course.	

7	Key to Abbreviations
CDM – Community Development Manager	

Belfast City Council

Report to:	Development Committee
Subject:	**Routine Correspondence - Volunteer Now**
Date:	17 September 2013
Reporting Officer:	Mr. John McGrillen, Director of Development, Ext. 3470.
Contact Officer:	Barry Flynn, Democratic Services Officer, Ext 6312

1.0	Relevant Background Information
1.1	On 9th May, 2013, the Minister for the Department for Social Development, Mr. Nelson McCausland M.L.A., announced the introduction of new budgetary arrangements to oversee the implementation of the Assembly's Volunteering Strategy.
1.2	In essence, the level of financial support for small grants would increase to £600,000 from £300,000; funding for the volunteering innovation programme would increase to £500,000 from £300,000; whilst the level of support for volunteering infrastructure would decrease from just over £1 million to £600,000. The Minister's decision to enhance the amount available for small grants and the volunteering innovation programmes was taken to promote the delivery of 'front line services' within the overall Volunteering Strategy.
1.3	Correspondence (copy herewith) has been received from Ms. Wendy Osborne, Chief Executive Officer of Volunteer Now, suggesting that a letter be forwarded to the Minister outlining the support which that organisation has provided to the Council and requesting that he reassess the decision to decrease the level of funding towards volunteering infrastructure.

2.0	Key Issues
2.1	Whilst there has been a reduction in the funding allocated towards volunteering infrastructure, the Minister has merely streamlined the level of funding within the Volunteering Strategy. The majority of this increase will be allocated towards enhancing the amount available for small grants and volunteering innovation programmes.
2.2	The Committee should be mindful that the Assembly has endorsed this realignment and there is limited scope for the Council to lobby the Minister. In addition, should the Committee accede to the request, it could create a precedent which would encourage other groups to request Council support.

3.0	**Recommendations**
3.1	It is recommended that the Committee notes the receipt of the correspondence and takes such action thereon as deemed appropriate.

	Decision Tracking
The Democratic Services Officer will implement the Committee's decision.	

	Documents Attached
Letter requesting support.	

VOLUNTEER NOW
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4 June 2013

Ms Catherine Taggart
Community Services Manager
Belfast City Council
City Hall
Belfast BT1 5GS

Dear Catherine

I am writing to inform you that the DSD Minister announced on the 9 May that there would be a c. 50% reduction in funding support for the work of the volunteering infrastructure and that this directly impacts on the delivery of volunteering support services provided by Volunteer Now. I have attached some more detailed briefing information for you that sets out the information regarding the Ministerial statement and the impact it will have. It is still unclear what the exact funding cut for Volunteer Now will be and while we are working on a c. 50% cut I am aware that this may be not be the case and could potentially be a more negative figure.

Volunteer Now provides regional infrastructure support to the promotion and development of volunteering across Northern Ireland which allows us to deliver, for example, the web site, a 'one stop shop' for volunteering information and good practice and regional promotional/recognition campaigns such as Volunteers Week. We also provide a dedicated local service to support volunteering across 15 Council areas one of which is Belfast City Council.

Volunteer Now exceeds the annual targets set by the DSD for recruitment of volunteers in relation to meeting our funding obligations. We have a track record of supporting volunteer involving organisations across Belfast to build best practice, maximise impact and enhance the volunteer's experience. We also work in partnership with Council staff to promote, support and develop volunteer involvement in community life. For example we have been involved with Council staff in promoting and supporting the successful Christmas Connections volunteer campaign. We provide support and information to staff on managing volunteers. The services and expertise provided by Volunteer Now is recognised by Council staff as an important resource that adds value to volunteering across the City. The City Council supported the European Year of Volunteering and regularly supports Volunteers Week recognition for volunteering.

We are concerned that the funding cuts we are faced with will be detrimental to the services we provide across Belfast, the extent of the cut and the short timeframe of implementation from 1st October mean that there will be staff losses for Volunteer Now and a reduction in the infrastructure services we provide. The limited lead in time for this substantive change does cause us concern. The other concern we have is that there would appear to be limited understanding within the DSD of what Volunteer Now as an organisation delivers. In that regard I would ask Belfast City Council to consider the issues raised in this letter and the attached briefing and to write to the DSD Minister outlining the important support you have had from Volunteer Now, the positive impact of the services we deliver and your concern that the funding cuts will have a detrimental effect on the development of volunteering in the City.

Thank you for your consideration of this information. Best wishes.

Wendy Osborne OBE
Chief Executive Officer
T: 028 9023 2020
W: www.volunteernow.co.uk

The Queen's Diamond
Jubilee Volunteering
Award 2012

INVESTORS
IN PEOPLE

VOLUNTEER *connect · build · change*

Urgent Briefing from Volunteer Now: The DSD Minister has recently taken the decision to make a substantive cut to funding for the volunteering infrastructure which will have a negative impact on the work of Volunteer Now in providing support for volunteers and volunteer involving organisations.

The following Ministerial Statement was made on the 9 May 2013 regarding future support for the volunteering infrastructure – 'volunteering budget remains at £1.7million pa (Small Grants increase to £600k (previous c£300k), Innovation Fund increase to £500k (previous c£300k) and **Infrastructure reduced to £600k (previous c £1.1m)'.**

Context: Volunteer Now has lived with uncertainty about the funding regarding the volunteering infrastructure regionally and locally since 2010. This uncertainty increased last year when issues emerged over the six proposed support funding contracts that were initiated in March/April 2012; this procurement process was terminated by the Minister last September.

In the last year Volunteer Now has endeavoured to remain true to the spirit of the vision that created our merged organisation, we believe in volunteering, we believe in an integrated infrastructure support model and we believe in what we do as Volunteer Now to promote, support and add value to volunteer involvement in Northern Ireland.

Volunteer Now has been an advocate for the establishment of a strategic policy endorsement for volunteering and we fully support the NI Executive's Volunteering Strategy. In that context we welcome the DSD's additional funding support for small grants and for innovation associated with delivery of the Volunteering Strategy. However it is very disappointing and highly detrimental to the promotion, support and development of volunteering that additional funding for these programmes is at the expense of the services, delivered by the volunteering infratructure.

Volunteering Strategy: The Volunteering Strategy for Northern Ireland states that a 'high quality volunteering infrastructure has a key role to play in the successful delivery of a volunteering strategy. There is a range of services, which infrastructure support organisations provide to enhance the capacity of all sectors involving volunteers. These services may include policy development, research, training on recruiting and supporting volunteers, information on specific issues relating to volunteer involvement, promotion of volunteering, recruitment of volunteers, assistance with good practice in relation to the protection of children and vulnerable adults and the development of standards in relation to volunteer management and support with governance'. **The priority action is to 'support an integrated infrastructure which provides appropriate services across Northern Ireland'.**

The impact of the Ministerial announcement: While organisational funding decisions have not yet been made the indications are from the DSD that the £600,000 annual figure for the volunteering infrastructure support is considered sufficient to deliver the Volunteering Strategy; that this funding covers both delivery of regional and local infrastructure services; that the funding will support consistent service delivery across every district council area; that the funding will have a focus on meeting disadvantage e.g. within Neighbourhood Renewal areas and that the funding will also cover supporting volunteer development and practice, as required, within those organisations allocated small grants.

The level of funding cut for the volunteering infrastructure is substantial and this coupled with a 1st October implementation does create organisational difficulties that

will necessitate job losses within Volunteer Now and loss of services to support volunteering at a local level.

It is unclear why the DSD appears to have devalued the work of the volunteering infrastructure. **Volunteer Now delivers a regional service across Northern Ireland and a local service across 15 local authority areas which cover a population of over 1.2 million (69% of the NI population).** Volunteer Now has for example delivered and substantively exceeded its volunteer number targets across the 15 council areas in which it operates. It is contributing to meeting the objectives of the Volunteering Strategy and has consistently delivered support to enhance front line services including:

Promotion of volunteering e.g. last year

- We received 5,500 volunteer registrations (10% from unemployed people); supported over 3,000 organisations registering 3,800 opportunities that provided 16,000 volunteer placements across N Ireland;
- We held 541 information/promotion events across the province;
- We supported157 local volunteering information points across NI;
- We distributed over 50,000 leaflets about volunteering including 20,000 targeted information for the unemployed;
- Over 100,000 unique visitors accessed information/training/registered for volunteering opportunities etc on website;
- We generated total media coverage £2.4m (£1m local and £1.4m regional).

Guidance and Training e.g. last year

- We trained over 1,500 people in volunteer management practice with 98% reporting improved practice as a result of training and over 100 people gaining recognised qualifications;
- We trained over 400 volunteers with 215 receiving accreditation;
- We dealt with 5,866 queries for specific information around volunteering as well as over 325 face to face support meetings;
- We supported over 250 small grant holders including making over 140 support visits;
- We had 20,000 downloads of our good practice publications; sent regular briefings and updates to 600 member organisations.

Recognition for volunteers and volunteering e.g. last year

- We provided for volunteers (free of charge) over 10,000 badges and to date over 7,000 volunteer certificates to over 600 organisations to recognise the contribution of volunteers;
- We supported 11 high profile recognition events across NI;
- We supported 63 organisations to gain the national quality award Investing in Volunteers;
- We raised the profile of volunteering in 31 public policy responses.

We believe it is vital that those who work with us and avail of our services are aware of the full implications of what has been announced. It is important to emphasise that we are deeply concerned that an expert and credible resource that has been developed over 40 years to support and add value to volunteering in Northern Ireland will be severely depleted.

We would encourage you to write to the DSD Minister, Nelson McCausland MLA, to highlight how Volunteer Now has supported you and volunteering in your organisation or area.

Wendy Osborne OBE, Chief Executive Officer, 30 May 2013

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Agenda Item 7c

Report to	Development Committee
Subject:	Children and Young People Service Update
Date:	17 September 2013
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officer:	Cate Taggart, Community Development Manager, ext 3525

1	**Relevant Background Information**
1.1	The purpose of the paper is to provide an update on the Council's Children and Young People (CYP) priority and seek approval for delegated authority for the 'Ur City 2' grant awards.
1.2	Since the last CYP update in May 2013, the children and young people unit delivered its summer programme which involved: − Summer Schemes & play sessions in 4 play centres and 3 outreach centres; − Summer central events attended by over 3,500 summer scheme children across Belfast at 2 Play days (4 July and 7 August), the Challenge Day (30 July) and Party in the Park (7 August evening event for teenagers); − Play staff provided 20 Come and Play Sessions in parks in Taughmonagh, Springhill and Connswater, 4 Fun days run by Parks and Leisure Department and 2 Wide Game events in Falls and Ormeau Parks − Play for All Project resources for community and play centres to support children with disabilities in their summer schemes and staff supported activities in the summer scheme run by Kids Together, which supports children with disabilities. − In support of summer activities, summer scheme training was provided to 300 staff and volunteers from community centres and voluntary groups comprising of both child protection and practical skills workshops. − Session support sessions for 42 summer schemes in the voluntary community sector were delivered on craft, games or messy play sessions. − Youth Forum members were front and centre at President Obama's visit on 17 June in the Waterfront Hall providing interviews for World Media; − The Growing Respect and Intergenerational programmes with the Youth Forum met over the summer and there was a Youth Forum day out.

Document Number: 152143

1.3	A full programme of activity is in development for the next months and updates will be provided in due course. Highlights include the: − New play projects are being developed in Sailorstown area, Lower Oldpark as well as with the Chinese Welfare Association and also An Munia Tober. − A new outdoor play project is underway in Connswater area. − Youth Forum residential (20 - 22 September); − Eurvoice Event (8 October) − The Council's Intergenerational project which involves a cross border visit; − Ur City 2 grant aid.
1.4	Other activities of interest taking place in the city in relation to children and young people are the Playboard Conference (8 & 9 October) and PCSP young people conference (24 October)
1.5	Ur City 2 grant aid The council's dedicated grant aid scheme targeting the needs of Children and Young People called ' Ur City 2' is underway. − Each year the Children and Young People Unit manage the £60,000.00 fund specifically targeted at delivering activities in the 12 Neighbourhood Renewal areas through the local area action plans for children and young people. − There are five themes under which proposed activities should be applied for and these are Good Relations, Community Safety, Culture & Arts, Health & Well-being and the Environment. − Each Neighbourhood Renewal Partnership appoints a Lead Organisation who can then apply for up to £5,000 award. − The Lead organisation supports and encourages children and young people to identify local resources, needs and any gaps in provision which 'Ur City 2' can support for example by supporting delivery of training opportunities, themed events, projects and activities. − All project proposals will be returned for assessment by Friday 27 September 2013 and projects will be delivered by the end of this financial year.
1.6	Delegated authority is sought for the Director to sign off the awards for the Neighbourhood renewal areas with a full update provided to Members thereafter.
1.7	A range of children and young people services continue to be delivered by other departments across council e.g. Growing Respect, Youth Engagement project etc. In February 2013 the PCN board agreed the outline corporate CYP outcomes framework which will shape a co-ordinated programme of work integrating all the Council's provision for children and young people priority in particular aligning it to the wider regional children and young people strategic partnership led by OFMDFM.
1.8	Strategically work continues to progress the framework with senior managers and meetings with Youth Champions have taken place or are being scheduled.

2	Key Issues
2.1	<u>Response</u> Traditionally a couple of Neighbourhood renewal areas did not apply in the first round and further calls were made with mixed success. This approach was not efficient as it did not leave a lot of project delivery time. Additional steps are in place this year to try to proactively address this issue, however, if the same experience occurs officers seek permission to redistribute the remaining monies (no more than £10,000) to applications already received from Neighbourhood renewal areas.

3	Resource Implications
3.1	The budget of £60,000 is within the departmental estimates for 2013/14.

4	Equality and Good Relations Implications
4.1	There are no relevant equality and good relations implications

5	Recommendations
5.1	Members are requested to note the contents of the report and grant the delegated authority for the Director to approve the Ur City 2 awards.

6	Decision Tracking
The CYP manager will implement the agreed actions.	

7	Key to Abbreviations
CYP - Children and Young People PCSP - Policing and Community Safety Partnership	

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Report to:	Development Committee
Subject:	Markets Community Centre out of hours opening
Date:	17 September 2013
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officer:	Cate Taggart, Community Development Manager, ext 3525

1	**Relevant Background Information**
1.1	Belfast City Council directly manages 22 Community Centres across the city. This includes the Markets Community Centre based within the Markets Community in the Shaftesbury ward of South Belfast.
1.2	The Markets Development Association (MDA) is a local community development and regeneration organisation. MDA are a member of the Inner South Neighbourhood Renewal Partnership Board and work in partnership with a range of groups including BCC Community Services to deliver services to the Markets and Lower Ormeau community. MDA are leading on regeneration/community development and interface issues, most notably the high profile Cromac Regeneration Initiative (CRI) in association with Donegall Pass Community Forum and Shaftesbury Recreation Centre and the Lanyon Tunnels Regeneration Project.
1.3	Community services have had a long association with the MDA. Their move into the community centre has resulted in increased public throughput at the centre with usage figures for the building at ninety two per cent. In turn the MDA have access to accommodation at the centre to deliver projects of local benefit.
1.4	MDA currently occupy two offices at the Markets Community Centre. In compliance with the Community Services Pricing Policy; MDA meet Community Development criteria and therefore do not incur hire charges. The organisation is required to sign and comply with the conditions of hire outlined in the centre booking procedure. This document is agreed and signed by the group on a quarterly basis.
1.5	MDA have indicated that similar to most community organisations service delivery is not confined to office hours. Directly managed community centres operate core opening hours and do not normally open at weekends.

1.6	MDA have requested that Community Services consider providing community centre access to their organisation outside of core hours. The group have suggested that a key holding arrangement be established. This would allow the group to extend the services which they find are being curtailed due to both availability (i.e. the centre programme is so busy that additional project development cannot be accommodated) and council's current operational arrangements.

2	**Key Issues**
2.1	- Community centres operate core opening times Monday to Friday. - With the exception of one-off requests and some 'historical' agreed usage, Community centres do not normally open at weekends. - Due to health and safety considerations the public are not permitted access unless a member of the supervisory staff team is on duty. - We do not currently provide keys of community centres to user groups.
2.2	The provision of keys to MDA would allow the group to develop and extend its services with access at particular times such as the period between 5pm – 6pm Monday to Friday, weekends and late evenings. MDA have identified a number of projects which would specifically benefit such as the development of work with senior citizens. Youth intervention projects. Health and well being initiative (Bike project, circuit's class, dance class) etc.
2.3	The approval of the request would provide; - Added value from a Council perspective as it will encourage new opportunities for collaborative working, increased volunteering and participation. - Maximise the use of a Council asset. - Offer value for money. With growing pressure on resources this model provides a more efficient asset offering increased use and greater community benefit. - Shared use of the facility which will support more sustainable use of the asset, sense of involvement, ownership and civic pride.
2.4	The provision of keys to the MDA would not impact on Council staff working arrangements as access to the building would be outside of normal working hours i.e. when staff are not normally on duty.
2.5	BCC legal Services Section and Estates Management Unit have advised that a Licence Agreement will be required with the organisation if Committee authorise the key holding request.
2.6	Authorisation of key holding of a Council asset to an external body will set a precedent for future requests. Committee will be informed of all such requests in advance. However precedent is already set in the operation of other assets, for example, Parks and Leisure department operate 'Out Of Hours Licence Agreements' at its leisure centres whereby sports clubs have been provided with keys to leisure facilities for their specific sporting requirements.
2.7	Castlereagh Borough Council operates a system of 'unmanned centres'. (Clonduff, Braniel, Downshire and Dungoyne). Keys to facilities are provided to a member of the local community. Groups/organisations wishing to use the facilities gain access via the local key holder. Council staff consists of one part

	time cleaner.
2.8	The Licence Agreement will also take account of a container belonging to the MDA situated in the grounds of the Markets Community Centre. This container provides storage for equipment related to healthy living projects. The MDA have responsibility for the container, maintenance and insurance. A formal agreement is required as the container is situated within the confines of the community centre perimeter fencing i.e., council land.

3	Resource Implications
3.1	Financial There will be some increase to utility consumption in the facility due to extended use.
3.2	Human Resources There are no human resources implications as extended opening of the facility will be outside staff normal working hours.
3.3	Asset and other implications Authorisation of key holding to an external organisation has the potential to maximise sustainable use of a Council asset; providing a unique model of partnership delivery of services.

4	Equality and Good Relations Implications
4.1	There are no relevant equality and good relations implications attached to this report.

5	Recommendations
5.1	Members are requested to consider authorisation of the key holding request from MDA subject to the organisation entering into a Licence Agreement with Council. Following a pilot test period of one year a review will be undertaken with specific consideration of any budgetary implication.
5.2	If members agree to the key holding request then a recommendation will be taken to the Strategic Policy and Resources Committee requesting that a Licence Agreement with MDA is prepared for approval. The terms of the Licence Agreement having been prepared by BCC Legal Services and Estates Management Unit.

6	Decision Tracking
Community Development Manager to liaise with the Director of Property and Projects with a view to bringing a report to the Strategic Policy and Resources Committee in due course.	

7	Key to Abbreviations
MDA - Markets Development Association CRI - Cromac Regeneration Initiative	

Document Number: 152142

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Belfast City Council

Report to:	Development Committee
Subject:	Poverty/Social Deprivation: Proposed Way Forward
Date:	17 September 2013
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officers:	Claire Patterson, Business Research & Development Manager ext 3379

1	**Relevant Background Information**
1.1	Following the Council Notice of Motion on 'social deprivation' in February and party briefings to test the idea of establishing a city-wide poverty forum/taskforce and the development of a citywide strategy, Committee agreed that poverty should form a key theme within the Council's community planning process and the need to align to the regional Delivering Social Change agenda.
1.2	The Committee will be aware that Council's framework to tackle poverty and social inequalities was completed prior to the implementation of related regional and citywide developments. The multi-faceted and complex nature of poverty and deprivation means that any future Council approach needs to align with policy and programme developments such as - Welfare Reform Bill - Delivering Social Change and Together Building a United Community - Social Investment Fund - Local Government Reform, particularly the transfer of functions (regeneration) and the introduction of Community Planning - Belfast Strategic Partnership's Framework for Action to Address Life Inequalities - Investment Programme priorities to invest n the city, create jobs and improve skills
1.3	The outcomes from the party briefings were considered by Committee in June 2013. All parties agreed on the importance of tackling poverty and that Council has a key role in influencing central government, providing a critical connection to issues at a local level. It was noted that to address poverty required a focus on increasing educational levels and aspirations, skills and employability along

	with increasing employment opportunities to create wealth to contribute to improve quality of life and to secure sustained improvement in the local economy. The community planning process offers an established governance mechanism and the opportunity to engage with a range of stakeholders.

2	**Key Issues**
2.1	A recent report by the Child Poverty Action Group (2013) reported that the cost to the economy of dealing with child poverty in Northern Ireland has reached £1bn, with around 97,979 children in Northern Ireland defined as living in poverty. In Belfast around 21,186 children are considered to be living in poverty with an estimated annual cost of 230 million. As is the case across the UK, there is also a growing trend of in-work poverty in NI, particularly with the increase in part time employment and various contractual arrangements.
2.2	A review of how other cities have tackled poverty has been carried out, including Liverpool City Region Child Poverty and Life Chances Commission, Greater Manchester Poverty Commission, Glasgow's Poverty Leadership Panel. These bodies vary in structure and focus but share a common aim, to establish a partnered approach to reducing poverty locally. The recommendations and priorities focus on early family interventions to improve education and life chances, increasing parental employment opportunities, maximising incomes and affordable warmth. It also indicated the importance of engaging with those experiencing poverty to understand the issues and identify potential interventions through co-design.
2.3	Council is already taking forward a range of actions to tackle poverty as outlined in the Framework document. There are a number of partnerships/groups in Belfast that Council is involved with that aim to tackle poverty-related issues such as Neighbourhood Renewal Partnerships, Belfast Outcomes Group, Bryson House, Belfast Strategic Partnership etc. Council is already developing two key strands of work which includes actions / considerations that should help tackle poverty: - Tackling health/social inequalities – focusing on food, energy, maximising incomes, family and living conditions. High level milestones have been developed and agreed by Strategic Policy & Resources Committee, including the establishment of an interagency forum on poverty. - Development of the Integrated Economic Strategy - this recognises the need to support economic growth and create employment opportunities, including enhancing the skills / employability, creating links with the education sector and connecting those from disadvantaged areas to economic opportunities. As raised during the party briefings, a strategic and inclusive approach is essential to maximise the level of impact and resources required to deliver, therefore this twin track approach will help to ensure that economic growth can benefit those experiencing poverty and that those experiencing poverty are in a better position to avail of the opportunities created.
2.4	Members will be aware that Council has agreed to a joint meeting at political and officer levels between council and OFMDFM to discuss how we can work together on programmes aimed at improving good relations and addressing social/economic problems following the release of Delivering Social Change combined with the Together, Building a United Community Strategy. This is a key strategic opportunity for Belfast in terms of delivering the strategies at a local level and highlighting the significance of the city in delivering this agenda.

2.5	DSDs Urban Regeneration & Community Development Framework includes policy objectives to tackle area based deprivation; improve linkages between areas of need and areas of opportunity and; to develop more cohesive and engaged communities – all of which will play an important part in tackling poverty related issues. The Council's preparations for Local Government Reform and the transfer of regeneration functions has an important role in shaping a future Belfast approach to the poverty agenda and Delivering Social Change.
2.6	Council officers from Development and Health & Environmental Services have been working to identify the next steps to take forward the poverty agenda within the context of community planning and developments already underway. The proposed next steps are therefore: - Joint discussion at officer and political levels between BCC and OFMDFM to discuss opportunities for joint working and Belfast's importance in delivering on the regional ambitions, as agreed by Council. - Assess the scope, resource and feasibility of the practical interventions that have been announced, or are being developed, to address poverty related issues (examples are included in Appendix 1). - It is planned that BCC form an interagency forum on poverty. It is proposed that this be initiated by hosting a broader facilitated workshop session which would include those working directly in the poverty field. This will provide a current assessment of the realities of life, including working life for those experiencing poverty as well as the current constraints in supply and demand in the labour market. The aim of the workshop would be to create greater co-ordination and integration as well as the identification of practical interventions that would make a real difference to existing efforts to tackle poverty at a city level.
2.7	The Committee is asked to note that a series of engagement events are taking place during the autumn to follow-on from the Future City Conference; continuing the conversation to develop city-wide priorities and a community plan. These include engagement with the anchor institutions and participation in the IBM Smarter Cities Challenge. The proposed facilitated engagement on poverty would also align to this process of engagement with key stakeholders to agree how best city issues can be tackled and progressed in a practical, integrated and realistic way.
2.8	The advent of community planning and transfer of regeneration, including neighbourhood renewal, as a result of Local Government Reform provide the opportunity to take a more co-ordinated approach to planning for the future of the city. Tackling poverty will be an integral component of a community plan and will influence the Council's future approach to regeneration, employability, social and quality of life issues. The Integrated Economic Strategy and Tackling Health/Social Inequalities programme of work, along with the efforts to integrate with Delivering Social Change provide an opportunity to connect strategy and programme delivery in Belfast.

3	Resource Implications
3.1	Resources for the engagement event will be met within the current departmental budgets. A cross departmental approach will be adopted to take forward the proposed next steps.

4	**Equality and Good Relations Considerations**
4.1	There are no Equality and Good Relations considerations attached to this report; however, it would be expected that efforts to tackle poverty would have a positive impact on Section 75 groups.

5	**Recommendations**
5.1	Members are asked to agree to the proposed next steps to consider the proposed interventions and to broaden the participation in a facilitated workshop which would support the planned interagency forum on poverty

6	**Decision Tracking**	
6.1	Timeline: December 2013	Reporting Officer: John McGrillen

Appendix 1:   Poverty Initiatives/Programmes

The following table outlines the programmes that have been supported through Delivering Social Change and DSDs Maximising Incomes Programme.

Table 1: Poverty Initiatives		
	Theme	**Project**
DE	Education / Employment	An additional 230 recent graduate teachers who are not currently in work will be employed to deliver tuition for children in primary and post primary schools who are currently struggling to achieve even basic educational standards
DHSSPS	Family support	Take forward the establishment of 10 Family Support Hubs over the next two years. These are coalitions of community and voluntary organisations and agencies which provide early intervention services locally to enhance awareness, accessibility, co-ordination and provision of Family Support resources in local areas.
DHSSPS	Family support	Additional high quality support to new and existing parents living in areas of deprivation through positive parenting programmes. This will include potentially engaging 50 additional health workers on a two year basis to support this work and will provide guidance, training and information for up to 1200 families
DSD/DETI	Place	Take forward the development of approximately 10 Social Enterprise Incubation Hubs servicing areas of multiple deprivation over a two year period. This is designed to tackle dereliction and community eyesores but also the lack of local employment by encouraging social enterprise business start up within local communities.
DEL	Education/ employment	Scale up and roll out the pilot intervention to support young people Not in Education, Employment or Training (NEET) in developing skills and linking them to the employment market through structured
Belfast City Council	Finance	Continue to address fuel poverty in the city by developing a Council Fuel Poverty Action Plan based primarily on analysis of results from 2012-13 DSD/Councils pilot programmes to include research and feasibility work on the potential for bulk buying schemes
DSD/ Lisburn City Council	Finance	Engaging with trusted partners, like faith based organisations and community groups in a tailored programme called the "Clinic Model" pilot scheme. An outreach officer will arrange clinics in the area,. The promotional materials highlight a dedicated freephone 'Make the Call' Benefits Advice Line.
PHA/DARD	Finance	MARA project – maximising access to services, grants and benefits in rural areas. Using trained enables to identify and connect with those in the community who would benefit from a home visit which would result in a household assessment. This enables referrals to be made and raises awareness of services related to home safety, community transport, energy efficiency etc.
BCC/PHA	Finance	Emerging Oil Club project based on an oil bulk-buying scheme.

NB. The **Council's Framework to Tackle Poverty and Social inequalities** includes practical actions for the Council to more effectively address issues of poverty; such as the design, pricing, opening times and promotion of programmes offered at leisure / community facilities; significant strands of work supporting programmes in 12 Neighbourhood Renewal areas; fuel stamp programme; support for advice services across the city. Also identified were: work with the LPS to directly promote their rate relief programme to communities through leisure and community centres; employability and skills programmes (such as the HARTE programme), programmes for local economic development, job creation and support for social economy enterprises all directly addressing worklessness – one of the root causes of poverty in the city.

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Agenda Item 8a

Report to:	Development Committee
Subject:	Quarterly Financial Report – Quarter 1 2013/14
Date:	17 September 2013
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officers:	David Orr, Business Support Manager, ext 3502

1	**Relevant Background Information**
1.1	The Strategic Policy and Resources Committee agreed on 18 June 2010 that: - the Council would produce financial reporting packs for the Strategic Policy and Resources Committee and each Standing Committee on a quarterly basis - the Budget and Transformation Panel would receive monthly financial updates if there were any significant issues to report.
1.2	The reporting pack (Appendix 1) contains a summary dashboard of the financial indicators and an executive summary explaining the financial performance of the Development Committee in the context of the financial performance of the overall Council. It also provides a more detailed explanation of each of the relevant indicators covering the year to date and forecast financial position at the year-end.
1.3	The style and layout of the reporting pack reflect much of the discussion and feedback arising from the Members' financial training at the end of September 2010. As we previously advised the Committee, we will continue to develop the style and contents of the reports in liaison with Members. Central Finance and our departmental management team have worked together to develop the information contained within this financial reporting pack.

2	**Key Issues**
2.1	<u>Current and forecast financial position 2013/14</u> The Development Department is under spent by £132,000, or 2.1% of its net budgeted expenditure of just under £6.3 million, at the end of quarter one.
2.2	Community Services are under spent by £68,000 (4.6%), City Events and Venues are under spent by £38,000 (2.2%), Economic Initiatives and International Development are under spent by £79,000 3.4(%) and Directorate is over budget by £53,000 (6.5%).

Document Number: 152275

2.3	There are five main areas which give rise to the current overall £132k (2.1%) under spend within the Department at the end of quarter one: - Gross Income was £1,780k, which was £113k (6.8%) higher than the budgeted income of £1,667k. This variance is mainly due to increased income at the Waterfront and Ulster Halls (totalling £117k) during the period. - Employee costs of £2,413k were £7k (0.3%) more than the budgeted figure of £2,406k. - Premises costs of £939k were £33k above the budget for the period. This was due to increased electricity, gas and rates charges within the City Venues Unit. - Supplies and Services expenditure of £1,794k was £131k (6.8%) below the budget of £1,925k. This was mainly due to under spends on equipment, tools and materials, license fees and advertising and marketing expenditure. These are profiling issues, most of which will self-correct in future periods. - Subscriptions and Grants paid amounted to £2,488k, which was £72k (3.0%) higher than the budgeted figure of £2,415k. This was due to groups meeting their monitoring requirements earlier than normal and, as a result, monies were paid out sooner than had been originally profiled by the Council.
2.4	It is currently forecast that the Development Department will be under spent by £15k (0.1%) at year end. - Community Services is forecast to be £20k (0.4%) under budget at year end. - Economic Initiatives is forecast to be £45k (0.7%) under budget at the year end. - Directorate is forecast to be on budget at year end. - Finally, the City Events and Venues Section are forecast to be £50k (1.3%) over budget at year end.
2.5	The Department will continue to monitor the variance between actual and budgeted expenditure during Quarter Two.
2.6	The financial reporting pack contains more detail on both the overall Council position and the financial performance in each of the Services within the Development Department.

3	Resource Implications
3.1	There is a year to date under spend of £132k and the forecast is that the Department will be under spent by £15k at the year-end.

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

5	Recommendations
5.1	Members are recommended to note the above report and associated financial reporting pack.

Document Number: 152275

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

7	Documents Attached
Appendix 1 - Financial Reporting Pack	

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Development Committee

Quarterly Finance Report

Report Period: Quarter 1, 2013/14

Dashboard

Revenue Section

Service	YTD	YTD Var £000s	Var %	Forecast	Forecast Var £000s	Var %	Page
Development Directorate	❌	53	6.5%	✅	0	0.0%	
Community Services	⚠️	(68)	(4.6)%	✅	(20)	(0.4)%	
City Events & Venues	⚠️	(38)	(2.2)%	⚠️	50	1.3%	
Economic Initiatives & Internat Devpt	⚠️	(79)	(3.4)%	✅	(45)	(0.7)%	
Committee Total	⚠️	(132)	(2.1)%	✅	(15)	(0.1)%	

Key Performance Indicators (KPI)

KPI	Actual	Target		Page
Compliant Purchases	83.3%	90.0%	❌	6
Timeliness Of Goods On System	71.3%	75.0%	❌	7

Committee Net Revenue Expenditure: Year to Date Position
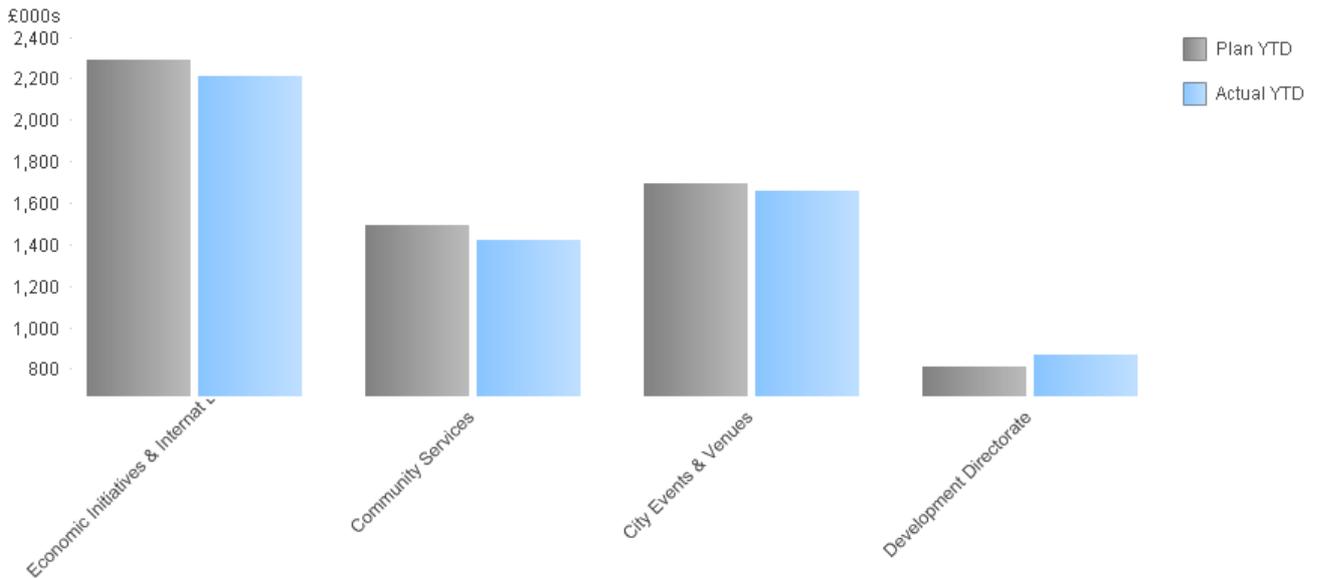
Commentary and action required:

The **Development Department** is under spent by £132,000, or 2.1%, of its net budgeted expenditure of just under £6.3 million at the end of Quarter One 2013-14.

Community Services are under spent by £68,000 (4.6%), City Events and Venues are under spent by £38,000 (2.2%), Economic Initiatives and International Development are under spent by £79,000 (3.4%) and Directorate is over budget by £53,000 (6.5%).

There are five main areas which give rise to the current overall £132k (2.1%) under spend within the Department at the end of Quarter One:

- Gross Income was £1,780k, which was £113k (6.8%) higher than the budgeted income of £1,667k. This variance is mainly due to increased income at the Waterfront and Ulster Halls (totalling £117k) during the period.

- Employee costs of £2,413k were £7k (0.3%) more than the budgeted figure of £2,406k.

- Premises costs of £939k were £33k above the budget for the period. This was due to increased electricity, gas and rates charges within the City Venues Unit.

- Supplies and Services expenditure of £1,794k was £131k (6.8%) below the budget of £1,925k. This was mainly due to under spends on equipment, tools and materials, license fees and advertising and marketing expenditure. Most of these variances are due to profiling issues that will self-correct in future periods.

- Subscriptions and Grants paid amounted to £2,488k, which was £72k (3.0%) higher than the budgeted figure of £2,415k. This was due to groups meeting their monitoring requirements earlier than normal and, as a result, monies were paid out sooner than had been originally profiled by the Council.

Community Services is under spent by £68,000 at the end of Quarter One (Budgeted expenditure: £1,490k; Actual expenditure: £1,422k).

The main reasons for this under spend are an under spend of £11k in employee costs; a £5k under spend in premises costs and a £48k under spend in supplies and services expenditure (mainly equipment, tools and materials).

City Events and Venues is under spent by £38,000 at the end of Quarter One (Budgeted expenditure: £1,694k; Actual expenditure: £1,656k).
Within this, City Events was over spent by £36k – in relation to employee costs and supplies and services costs (which will self-correct in future periods). City Venues were under spent by £74k. This was mainly due to the receipt of additional income totalling £117k which was then partially offset by additional employee and increased premises costs. Relevant budgets will be re-profiled, if required, in the next accounting period.

Economic Initiatives and International Development is under spent by £79,000 at the end of Quarter One (Budgeted expenditure: £2,286k; Actual expenditure: £2,207k).
The reason for this variance was an under spend in employee costs of £49k (mainly as a result of a number of vacant posts which are in the process of being filled); premises costs are under spent by £7k due to profiling issues; and supplies and services are under spent by £105k which, again, is due to variations from the budgeted profile. This will also self correct in future periods. Finally, subscriptions and grant are over spent by £82k due to groups meeting their monitoring requirements earlier than normal and, as a result, monies were paid out sooner than had been originally profiled by the Council. Again, these are all profiling issues which will self-correct over the financial year.

Directorate is over spent by £53,000 at the end of Quarter One.
(Budgeted expenditure: £813k; Actual expenditure: £866k).
The over spend can be attributed to the following factors:
- A £27k over spend in employee costs due to additional agency staff costs as a result of the structural review implementation to give required business continuity; and
- A £26k over spend in hired and contracted services due to expenditure being out of line with profile. This will self-correct in future periods.

Committee Net Revenue Expenditure: Forecast for Year End (YE)
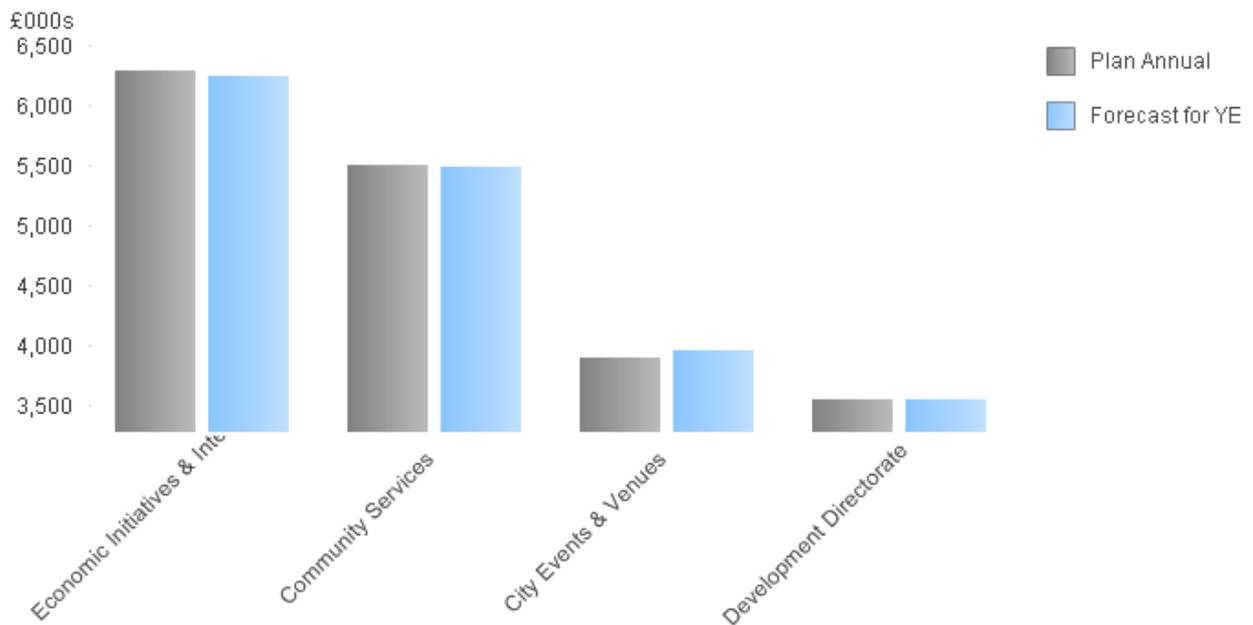
Commentary and action required:

Forecast for Revenue Expenditure:

It is currently forecast that the Development Department will be under spent by £15,000 at the end of the 2013 – 2014 financial year.

The Community Services budget is forecast to have an under spend of £20,000 at the end of the year. This is in relation to lower than planned spend within supplies and services.

The Economic Initiatives and International Development unit are forecast to be under spent by a total of £45,000. This relates to reduced employee costs as a result of a number of vacant posts within the structure in the first quarter of the financial year.

The City Events and Venues unit are forecast to have an over spend of £50,000 at the end of the year. This is as a result of increased cleaning and telephone costs within the Waterfront and Ulster Hall, and increased overtime costs in the City Events team.

Directorate are forecast to be on budget at the end of the financial year.

Key Performance Indicators (KPIs): Procurement Compliance

Procurement Compliance refers to the purchases that are made in compliance with the standard procure to pay process in BCC. These processes help ensure that our creditors are paid in a timely fashion and our accounts are accurate and up to date. The following indicators are intended to give a flavour of how well we are doing at adhering to the processes.

Indicator 1: Compliant Purchases (Purchase order created on system before ordering goods)
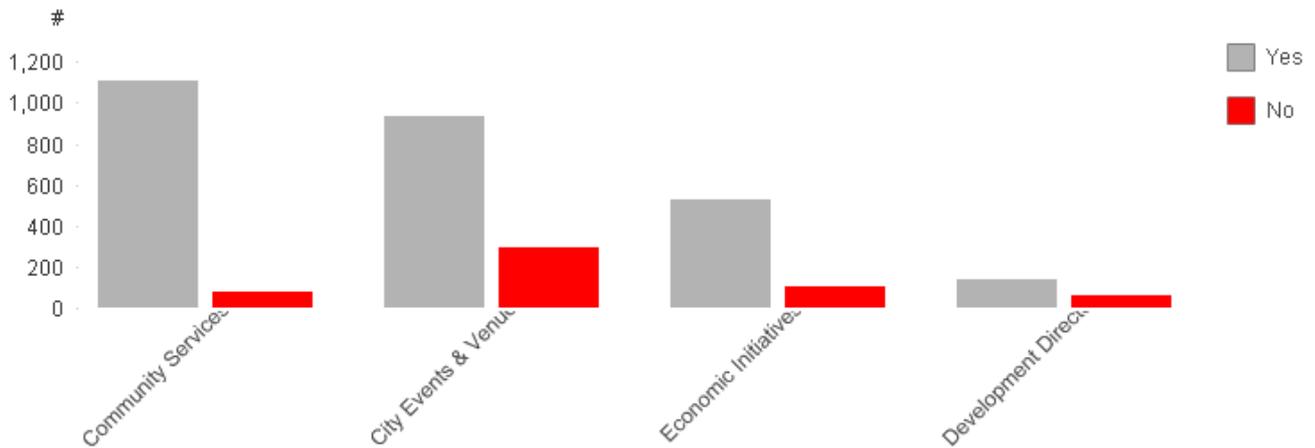
The impact of ordering goods without a purchase order being created on the system are that a) the authorisation for purchasing goods has not gone through the proper channels, b) incomplete records are available and decisions are being made based on information that is not correct and c) suppliers whose invoices do not have purchase orders take longer to pay and this contravenes an objective of the investment programme, negatively affecting supplier relationships with BCC.

Commentary and action required:

	Yes	No	Total	% Compliant
	2,710	**543**	**3253**	**83.3%**
Community Services	1,110	80	1190	93.3%
City Events & Venues	935	298	1233	75.8%
Economic Initiatives & Int...	524	105	629	83.3%
Development Directorate	141	60	201	70.1%

The Development Department is currently 83% compliant in terms of the Purchase Order being raised before the supplier invoice date. The Development Department is slightly above the Council average which is 82% compliant.

Departmental compliance is affected by the continuous reliance on manual requisitions and processes, collections and delivery of manual requisitions from remote locations, increased processing time as a result of "sourcing" which elongates the approval process and the recent implementation of the SRM system to specific services.

The Department is currently working to implement and roll out the SRM system to all services within the department. The Department is also fully participative in systems improvement via the SAP Improvement Group, the identification of hot spots and the provision of training for staff.

The department has recently implemented a new initiative that will monitor, identify and resolve specific instances of non-compliance at Unit level.

Procurement compliance is kept under constant review and is reported on a monthly basis to the Departmental Management Team.

Key Performance Indicators (KPIs): Procurement Compliance

Indicator 2: Timeliness of Goods on System (Goods received and marked received on system within 5 days)
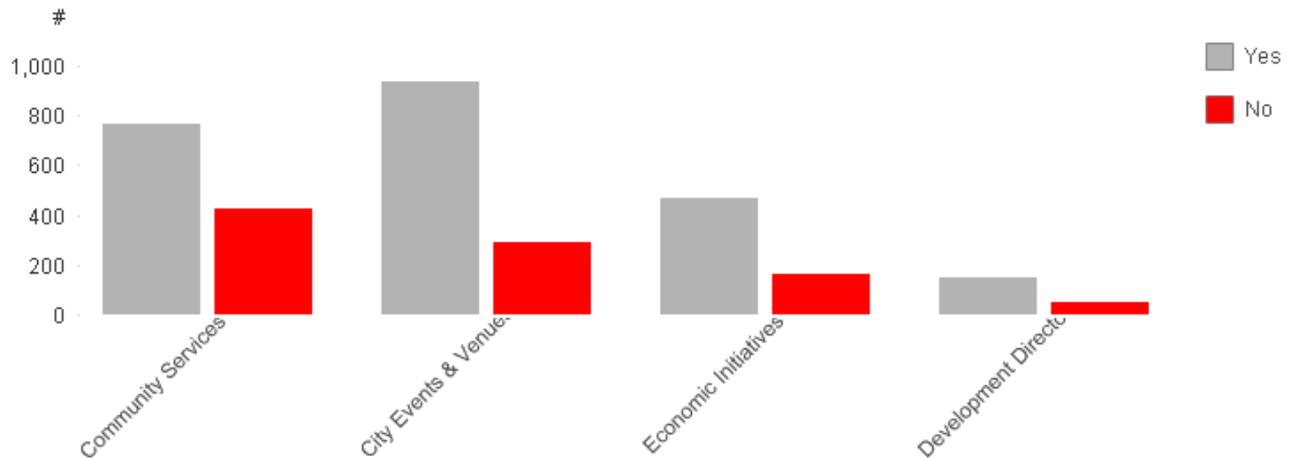
The impact of not marking goods as received onto the system is that a) BCC records of goods on site are not up to date and b) there is a risk that a department might overspend its budget as goods have been received but are not showing against the budget and c) it can take longer to pay the suppliers invoices and this contravenes an objective of the investment programme, negatively affecting supplier relationships with BCC.

Commentary and action required:

	Yes	No	Total	% Compliant
	2,319	934	3253	71.3%
Community Services	762	428	1190	64.0%
City Events & Venues	939	294	1233	76.2%
Economic Initiatives & Int...	468	161	629	74.4%
Development Directorate	150	51	201	74.6%

The Development Department is currently 71% compliant in terms of the goods received note (GRN) being created before the supplier raises the invoice. The Development Department is slightly above the Council average which is 70% compliant.

Departmental compliance is affected by the continued reliance on manual processes and paperwork, collections and delivery of manual goods received notes from remote locations and the recent implementation of the SRM system to specific services.

The Department are currently working to implement and roll out the SRM system to all services within the department, are fully participative in systems improvement via the SAP Improvement Group, the identification of hot spots and the provision of training and re-training of staff.

The department has recently implemented a new initiative that will monitor, identify and resolve specific instances of non-compliance at Unit level.

Procurement compliance is kept under constant review and is reported on a monthly basis to the Departmental Management Team.

Development Committee

Service	Section	Plan YTD £000s	Actuals YTD £000s	Variance YTD £000s	% Variance	Annual Plan 2013/2014 £000s	Forecast for Y/E at P3 £000s	Forecast Variance £000s	% Variance
Total		**6,284**	**6,152**	**(132)**	**(2.1)%**	**19,239**	**19,224**	**(15)**	**(0.1)%**
Development Directorate	**Total**	**813**	**866**	**53**	**6.5%**	**3,551**	**3,551**	**0**	**0.0%**
Development Directorate	Business Research & Development	118	136	18	15.2%	546			
Development Directorate	City Development	15	28	13	87.2%	251			
Development Directorate	Development Business Support	456	449	(7)	(1.5)%	1,807			
Development Directorate	SNAP	0	0	0	0.0%	0			
Development Directorate	Urban Development Unit	224	252	28	12.6%	947			
Community Services	**Total**	**1,490**	**1,422**	**(68)**	**(4.6)%**	**5,499**	**5,479**	**(20)**	**(0.4)%**
Community Services	Community Services	1,490	1,422	(68)	(4.6)%	5,499			
City Events & Venues	**Total**	**1,694**	**1,656**	**(38)**	**(2.2)%**	**3,904**	**3,954**	**50**	**1.3%**
City Events & Venues	Events	601	637	36	6.0%	1,500			
City Events & Venues	Waterfront Hall	1,094	1,020	(74)	(6.7)%	2,404			
Economic Initiatives & Internat Devpt	**Total**	**2,286**	**2,207**	**(79)**	**(3.4)%**	**6,285**	**6,240**	**(45)**	**(0.7)%**
Economic Initiatives & Internat Devpt	City Markets	55	53	(2)	(3.5)%	(24)			
Economic Initiatives & Internat Devpt	Economic Development Unit	89	130	42	47.3%	1,328			
Economic Initiatives & Internat Devpt	European Unit	65	59	(6)	(9.0)%	230			
Economic Initiatives & Internat Devpt	Tourism Unit	2,077	1,965	(113)	(5.4)%	4,751			

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Agenda Item 8d

Report to:	Development Committee
Subject:	Intention to seek tenders for the provision of Catering, Bars and Restaurant service at Belfast Waterfront Hall
Date:	17 September 2013
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officers:	Jacqui Owens, Operations Manager, ext 1401

1	Relevant Background Information
1.1	At its meeting on 9 April 2013 the Committee authorised the Director, under the scheme of delegation, to undertake a tender process for the provision of catering, bar and restaurant service for Belfast Waterfront Hall.
1.2	The Committee will be familiar with the existence of a concession services contract held by Mount Charles Catering since August 2006 for the provision of catering, bars and restaurant service at Belfast Waterfront Hall. At their meeting on 21 January 2012 the Committee approved the extension of their current contract up to a limit of 30 September 2013.
1.3	This extension to 30 September 2013 was granted for the purposes of maintaining continuity of service whilst the Waterfront management team explored the potential for development of a convention centre on the site.

2	Key Issues
2.1	Final designs are still not available for the convention centre development though the outline programme for construction (subject to funding) is now clear and predicts opening of the extended Waterfront facility mid 2016. It is anticipated that the comprehensive hospitality and catering demands of such a facility will differ from the current provision and therefore a service contract would be tendered in the winter of 2015.
2.2	Advice from legal services and the procurement team suggests that it is both feasible and desirable to procure a supplier to provide the catering service for the interim period of 2 years between the termination of the current contract and the letting of that new and potentially larger scale contract.
2.3	Unfortunately delays have been encountered in finalising the tender specification as a result of identifying the construction effect on business continuity and facility availability and as a result it is now necessary to request a 3 month extension to

	the current Mount Charles contract from 30 September 2013 until 31 December 2013.
2.4	Legal and procurement advice has been sought and it has been agreed that in the circumstances a 3 month extension is appropriate.

3	**Resource Implications**
3.1	None

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

5	**Recommendations**
5.1	It is recommended that the Committee: - Approve the 3 month extension of the current Mount Charles Contract from 30 September 2013 to 31 December 2013 - That the Council seek tenders for the provision of Catering, Bars and Restaurant service at Belfast Waterfront Hall for a 2 year period from 1 January 2014 until 31 December 2015 on the same basis and terms as approved at the Development Committee on 9 April 2013

6	**Decision Tracking**
It is anticipated the procurement exercise will conclude with evaluations in the month of November and the Director will seek approval for appointment of the successful contractor at the earliest opportunity in December 2013.	
Timeline: December 2013 Reporting Officer: Jacqui Owens	

Document Number: 152441

Agenda Item 8e

Report to:	Development Committee
Subject:	Belfast Waterfront/Ulster Hall Conference Sales Schedule 2013/2014
Date:	17 September 2013
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officers:	Jennifer Crawley Patterson, Revenue and Business Generation Manager, ext 1335

1	**Relevant Background Information**
1.1	As we prepare for the opening of the new extension planned for Belfast Waterfront in 2016, it is important that there is a proactive marketing and sales programme in order to ensure business success for the new facility.
1.2	During 2013-2016 the sales team intends to work in partnership with Visit Belfast, the Northern Ireland Tourist Board (NITB) and Tourism Ireland to maximise existing sales platforms and identify new market opportunities for Belfast and the Waterfront. At this stage it is envisaged that our annual programme for 2013/2014 will include attendance at a number of key UK, European and International tradeshows and targeted meet the buyer events.
1.3	The purpose of this report is to make Members aware of the national and international sales activity planned to promote the new extension and to request that Members approve the attendance of key conference sales staff to participate at each of the tradeshows/sales missions outlined in the activity schedule in Appendix 1.

2	**Key Issues**
2.1	In the past the Waterfront's conference sales team has attended on average three tradeshows/destination showcases per year, this activity has for the most part been concentrated in the United Kingdom. As a result of the planned extension, we are able to offer conference and meetings planners an enhanced proposition and can confidently target the European and International marketplace now that our physical capacity is increasing.

2.2	Execution of the activity outlined in the sales schedule aims to:
	  - Raise awareness and interest in the new extension planned for Belfast Waterfront in 2016
	  - Identify and target new large-scale national and international conference

	opportunities for the venue - Position the city and the Waterfront as a leading conference destination - Reinforce the Waterfront's position as a top-tier European conference centre - Support central and local government strategies to enhance business tourism development, job creation and socio-economic growth
2.3	In terms of peer group analysis it is worth noting that the Convention Centre Dublin (CCD) recently increased its sales resource and doubled the number of European tradeshows it will attend this year in order to win more business from European corporate and associations. Many of our UK competitors are already established in the international market place and attend the main Meetings, Incentive, Conference and Exhibitions (MICE) industry tradeshows such as IMEX America, IMEX Frankfurt, EIBTM in Barcelona and International Confex in London.
2.4	International conference business lead times on average range from 2-6 years. In order to attract conferences to the new extension it is imperative that we plan ahead and engage with international conference planners now if we are to secure bookings for 2016 and beyond. Working with Visit Belfast and NITB, we've identified a number of key sales platforms for the incoming year, these include: - 1 x NI industry event launch (September/October – timing subject to project funding announcement) - 2 x Belfast Ambassador Events –October and December presentation (timing subject to project funding announcement) - 3 x extension launch events in London (November depending on funding announcement), Washington (October 2013), Brussels (February 2014) - 6 x sales missions – GB x4 (one per quarter), Europe x 1, Kenes International HQ x 1 - 3 x tradeshows - IMEX America in October 2013 and in 2014, International Confex in March and IMEX Frankfurt in May - x super familiarisation trip (January – March 2014)
2.5	Given the significance of the Waterfront extension project and the level of financial investment from Belfast City Council, NITB and the European Regional Development Fund, there may be ministerial representation at a number of these key business tourism launch events, namely the Washington Business Tourism event on 6 November and the Brussels launch planned for February 2014. It is recommended therefore that the Development Committee also considers representation at events where the DETI Minister may be present. Please note at the time of writing this report we understand that the Lord Mayor will be in attendance at the Belfast Business Tourism event in Washington.

3	Resource Implications
3.1	Participation fees to attend all of the national and international activities specified in Appendix 1 are estimated to come in at a cost of £20,000. This does not include officer travel, accommodation and subsistence costs however if Members approve the units participation at these events then the team will look to book their travel and accommodation requirements well in advance of each trip to secure preferential rates.

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

5	Recommendations
5.1	It is recommended that Members: - Note the contents of the report - Approve the participation of one Council Officer at each of the sales missions outlined in the sales calendar - Consider political representation at events at which the DETI Minister may be present

6	Decision Tracking
	Reporting Officer: Jennifer Crawley Patterson, Revenue and Business Generation Manager

7	Key to Abbreviations
	NITB – Northern Ireland Tourist Board TIL – Tourism Ireland VB – Visit Belfast

8	Documents Attached
	Appendix 1 –Belfast Waterfront Sales Promotional Schedule 2013/2014

Document Number: 152374

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