

Belfast

BELFAST CITY  
**MASTERPLAN**  
Review 2012



Draft (Jan 2012)

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## 1 INTRODUCTION

Belfast City Council published its first city wide masterplan in 2004 as a leadership response to the need for a joined up and singular vision that could guide the development of the city as it emerged from some 40 years of civil conflict. In 2011 it commissioned SLR Consulting Ltd to undertake a review of the masterplan and to align its strategy with the very different set of challenges likely to be faced by the city in the period 2012 -2020.

The 2004 Masterplan was 'intended to begin the process of generating new growth in Belfast by laying the foundations for a revival of the City playing more effectively the role of regional capital'. This revival would not be a matter of chance but would require:

- An honest and unflinching analysis of the City's problems and its relationship with its region – the economic entity;
- a commitment to tackle even unpalatable and difficult issues;
- a strategic alignment to support a single long term strategic framework for the development of the City;
- commitment of energy and financial resources and intellectual resources to the implementation of that strategy; and
- Clear, effective responsibilities for the development, implementation and review of that strategy.

The City Council has used the Masterplan as the basis for its response to the strategic positioning of the city within the regional planning debate in Northern Ireland and to guide its city wide response to the urban regeneration of the city itself. It has informed the City Council's position on the draft Belfast Metropolitan Area Plan, the Regional Development Strategy for Northern Ireland and the Regional Transportation Strategy and has guided its contribution to all areas of its social and economic development agenda including its significant achievements in the tourism sector.

The primary achievement of the Masterplan however, has been to give focus to an ongoing discussion about how best to manage and direct the systematic reconstruction of this city to benefit all its citizens. The Masterplan gave rise to the State of the City series of annual conferences and debates that brought leading urban regeneration practitioners from across the world to Belfast to share experience and best practice of how to reconstruct this post industrial city to compete internationally.

This series of annual debates provide a momentum for stakeholder engagement, for the international promotion of the city, for linked governance and for building the confidence of private sector investors. All of this harnessed and helped shape the very substantial building and investment programme that has transformed parts of this city ahead of the economic downturn in 2008.

Political stability has been the cornerstone of Belfast's revival. This stability has enabled the City Council to build its leadership capacity and to advance a progressive 'to do list' in partnership with Government, the private sector and the community sector in the city. The Masterplan 'to do list' engaged all the city stakeholders and released energy across the city producing an interactive, organic development response, the benefits of which can be seen in almost all neighbourhoods.

Maintaining momentum for the next phase of the Masterplan will however present a new set of challenges. They will include:

- **Refocusing the city's wealth base** – The city cannot deal with deprivation without creating wealth. This wealth base needs to be refocused around programmes for

learning and skills development, business innovation, community capacity building and the fusion of arts, culture and destination development.

- **The ability to deal with deprivation** – The global recession will impact on the poorest communities the hardest. Areas of the city suffering multiple deprivation will present intense challenges. These will call for innovative community based solutions building and using capacity at a local level to co-produce projects.
- **The need to develop a total place agenda** – The need to focus on what will work best in terms of integrated service delivery for communities - how public money is spent in a local areas and how business, voluntary and public sector bodies can work together to deliver optimal spatial planning solutions and public services.
- **The ability to set priorities** – The austerity era in public financing will demand that the city is selective in directing resources to where they will produce the greatest benefits for the city as whole. The city must focus these resources and select its short list of game changing projects and commit to them.
- **The importance of targeted strategic partnering-** The Council must use its influence to create new positive approaches to delivery that can harness the power of the city's institutions- primarily its health and University sectors and address issues at the city regional scale. In many cases metropolitan engines and strategic issues could benefit from further coordination.
- **The need to nurture city centre cohesion-** the Council must now address the challenge of leading the continued functional regeneration of the city. The centre city remains the most important economic space in the region. This areas needs to be firmly connected to the city neighbourhoods and needs a focus on physical cohesion, to positively influence public and private sector spend to sustain its reconstruction.
- The need to lead and **develop an urban policy framework for the Belfast city region-** that could realise significant economic, social and environmental benefits. Belfast City Council, in partnership with adjacent Councils, will need to consider the potential for new administrative and governance structures that better reflect Belfast's physical, social, economic, cultural or environmental reality.
- **The ability to deliver-** RPA and other governance changes need to reflect the Council's capacity to deliver the masterplan strategy within a challenging fiscal environment. This will present new opportunities to create new structures and partnerships with the community sector, government and the private sector to advance the implantation of key programmes.

## 1.1 The Review

The scope of the Masterplan review is concerned with evaluating the performance of the Belfast Masterplan, agreed and adopted by Belfast City Council in 2004.

The purpose of the original plan was to set out a vision for the future development of Belfast, progress thinking and detail the City Council policy position on key issues, thereby influencing and shaping the delivery of major projects and regeneration initiatives that would improve the city's performance socially, economically and environmentally.

Although non statutory in nature, in so far as its provisions were consistent with dBMAP, it has also influenced decision making in relation to development decisions. As adopted policy of Belfast City Council, it has also influenced the approach to regeneration adopted by the DSD.

The original Masterplan strategy sets out five objectives for change;

- Grow the City;
- Develop the City Centre;
- Develop the New Industries;

- Provide Land for Employment; and
- Simplify City Governance.

These objectives were translated into the Spatial Plan, which identified strategies for

- An Energised Core
- A Connected Middle City
- Integrated Neighbourhood Renewal
- Released Environmental Assets
- Enhanced Presentation of the City

The review reconsiders this overarching strategy for Belfast in light of the impact of changing economic circumstances, reduced private and public sector investment and the need to re evaluate and prioritise key issues in order to sustain the performance of Belfast as the regional capital and economic driver. It focuses on strategy refinement and the implementation of identified opportunities for city development.

The result is a refined single vision and partnering strategy that aligns with the themes of the **Corporate Plan 2008 -2011**.

- City leadership
- Better opportunities for success across the city
- Better care for Belfast's environment – a clean, green city now and for the future
- Better support for people and communities
- Better services
- Better value for money.

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It has also be prepared with consideration given to the **City Investment Programme 2012 - 2015** which is also currently under review. The principles that underpin this investment programme are;

- Good relations and equality
- Balanced investment
- Partnership and integration
- Value for money
- Sustainability

Delivery and implementation of the masterplan will depend on the degree of alignment with the resources commitment set out in the Investment Programme. This requires the reconciliation of short and long term timescales and objectives.

In addition to the Corporate Plan, the review process was informed by a series of State of the City Debates taking place over 2010/2011 and updates to evidential studies and strategies including;

- Research into the competitiveness of Belfast 2011
- Belfast flow of people, skills, spending and investment 2009
- Regional Transportation Strategy 2011
- Shaping our Future Regional Development Strategy 2011
- Draft Economic Strategy Priorities for sustainable growth and prosperity 2011
- Draft Programme for Government, Building a better future 2011
- Sustainable Development Strategy for Northern Ireland 2010
- Belfast City Council Investment Programme 2012 – 2015
- Belfast Strategic Regeneration Frameworks

These plans and relevant studies provide supporting information and an evidential base leading to the

- Refreshing the strategic analysis
- Validation of emerging challenges
- Evaluation of the Masterplan Strategy
- Benchmarking against best practice
- Framing a new set of priorities
- Focus on new models for delivery and implementation



## 2 REFRESHED ANALYSIS

### 2.1 Belfast- Regional positioning and economic competitiveness

Belfast 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 encompassing Castlereagh, Lisburn, North Down, Newtownabbey and Carrickfergus.

Belfast functions well beyond its administrative boundaries providing jobs, housing, employment and strategic leisure and educational opportunities for the wider sub region and region:

- 268,323 people live in the city while 650,958 live in the wider metropolitan area
- Inward commuting to the city was 96,000 in 2001 (of which 80,000 people travelled by car or car pool)
- Commuting is considered to have grown by approximately 15 per cent since 2001, and was estimated at 107,538 in 2009
- Net commuting into Belfast is forecast to increase by over 30,000 persons in the next 30 years
- Belfast Travel to work area covers an area of approximately 2,690 square kilometres with an estimated population of 855,000
- Belfast has almost 28% of the total employment in Northern Ireland (this figure increases to almost 46% in the Belfast Metropolitan Area).
- It is anticipated that 22,000 additional jobs could be created within the city between 2008 and 2028
- The three main hospitals treated a total of 1,010,741 patients in 2008-09, 35.5 percent of Northern Ireland's patient activity
- Almost 130,000 annual hospital admissions are by non-Belfast residents
- 7.1 million people visited the city in 2008
- Queen's University of Belfast and the University of Ulster account for 49,121 students; another 10,180 students are accommodated through Stranmillis and St Mary's colleges.
- There are 12,000 post-primary pupils resident outside Belfast
- Belfast City Airport handled about 2.7 million passengers in 2010, representing approximately 40% of the scheduled domestic air traffic to and from Northern Ireland
- Belfast Port facilitates the majority of the region's exports and imports

Belfast flow of people, skills, spending and investment report (Oxford Economics, 2009) details Belfast's important role based on these interactions, its economic specialisations, level of NI service sector foreign direct investment (FDI) and international transport links.

The figures show Belfast at the heart of a diverse functional urban area that stretches far beyond the city council administrative boundary to an area defined by the city's labour and skills catchment as indicated by the mobility patterns of commuters who travel to work in the city on a daily basis.

Whilst for Belfast, no specific GDP figure is given, in Europe it is estimated that 67% of GDP is generated in metropolitan regions<sup>1</sup>, so there is no surprise in the dominance of Belfast within the Northern Ireland economy. Belfast's competitive performance and sustainable development will thereby maximise the economic performance of Northern Ireland as a whole.

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<sup>1</sup> Cities of tomorrow Challenges, visions, ways forward (European Union, 2011)

Within an all island context, there is also the wider significance in terms of the international trend towards agglomeration within metropolitan regions. For Ireland this means that the two cities of Belfast and Dublin are likely to continue to dominate and drive national economic performance in both jurisdictions and these centres will intensify the competitive advantage of the East Coast corridor that links them.

The Council's aim is to develop governance and organisational structures with capacity to address issues at the city regional scale that significantly impact on how the city operates and develops. These city regional issues stem from a weak commitment to coordinate significant employment and housing allocations and address their divergence within an adequate sustainable regional transport strategy. Belfast is performing well as the regional engine, but it could perform so much better if these issues were properly aligned at the appropriate spatial scale.

The Belfast Masterplan strategy of 2004 was founded on the principles of the core city movement as advanced by best practice in spatial planning and regeneration. Core cities were understood to be the primary economic engines that would drive regional economies and, across the UK, city regional development strategies were put in place to empower the core cities to perform this leadership role.

Within the Regional Development Strategy (RDS) for Northern Ireland, there is a sense that some of the language has been borrowed around the core city movement in our references to Belfast's role but not fully understood what it means when translated into policy. The current draft RDS and its sister Regional Transportation Strategy (RTS) are examples of this; where on the one hand Belfast is championed as the capital city and driver of regional growth, whilst on the other the potential to perform this role is undermined by contradictory policy positions centred on a partial polycentric growth model for the region. This effectively sustains a policy of permissive dispersal that dates back to the Matthews report of the early 1970's and which continues to bleed the development energy away from the Belfast region.

The absence of a properly aligned and meaningful city regional development strategy within the current RDS is one of the biggest inhibitors to the city's post industrial reconstruction and its ability to fully drive regional economic recovery.

## 2.2 City Competitiveness, Drivers and Inhibitors

The economic climate has adversely affected all sectors within the Belfast and Northern Ireland economy without exception. The consequent rise in unemployment rates, coupled with rising food and energy prices have also reduced household incomes and a prolonged period of dampened demand is expected as economies deleverage and reduce debt ratios.

Oxford Economics (2011) forecasts a period of 'jobless recovery' in the UK, NI and Belfast economies, with the recovery of pre-recession employment levels expected by 2017. It is anticipated that Belfast's ability to weather and recover from this recession will depend on its competitiveness;<sup>2</sup> the economy's capacity to grow, change and develop in the future.

Competitiveness is strongly linked to productivity or the value or profits associated with goods and services produced by an economy. Factors influencing this competitiveness include the cost of doing business, accessibility and the availability of capital (skills, knowledge and entrepreneurship, land & buildings) to innovate, develop and sell products and services.

For Belfast, a number of factors have been identified by Oxford Economics (2011) that will constrain economic prospects and productivity;

- an economy that is over reliant on public services,
- public services that are not effectively coordinated or delivered at the appropriate level
- low levels of entrepreneurship (lowest of the comparator cities)
- high levels of labour market inactivity
- large numbers of low or unskilled labour
- accessibility (i.e. by road, rail or air) (lowest of the comparator cities)

Many of these issues are echoed at regional level and have been highlighted in Northern Ireland's draft Economic Strategy, Priorities for sustainable growth and prosperity (DETI 2011). The economic vision for 2030, as set out in this strategy, is an economy characterised by a sustainable and growing private sector, where a greater number of firms compete in global markets and there is growing employment and prosperity. Northern Ireland's Economic priorities are

- rebalancing the economy to improve the wealth, employment and living standards
- rebuilding the economy to address the impact of the global economic downturn, particularly on employment.

A number of priorities have been identified in order to rebalancing the economy;

- stimulate Innovation, R&D and creativity and facilitate the role of the port and airports so that the export base is expanded;
- improve the Skills and employability of the entire workforce so that people can progress up the skills ladder, thereby delivering higher productivity and increased social inclusion;
- compete effectively within the global economy and be internationally regarded as a good place to live and do business;
- encourage business growth and increase the potential of our local companies, including within the social and rural economies; and

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<sup>2</sup> Many of the approaches used to measure competitiveness require detailed data such as export and trade data; Research and development activity; innovation and technological capability, many of which are unavailable at city level. The World Trade Organisation's "Global competitiveness report" fines competitiveness as "the set of institutions, policies and factors that determine the level of productivity of a country" (or an economy).

- develop a modern and sustainable economic infrastructure that supports economic growth.

### **Economic Growth Scenarios**

Belfast flow of people, skills, spending and investment report (Oxford Economics, 2009) outlines some possible future growth scenarios for the Belfast economy; the central and higher growth scenarios. The central scenario predicts;

- Almost 10,000 net job losses between 2008 and 2010 – equivalent to the gains achieved over the longer 4-year period 2004/2008.
- Net job loss is predicted across all sectors with the exception of health and social care work
- Belfast's resident employment rate is set to fall by over 2 percentage points, the number of non-employed working age residents to rise by almost 6,000
- net commuting to fall (as there are fewer jobs to commute to).
- A downturn that more severely affects lower grade occupations and lower skilled persons (residents as opposed to more mobile /skilled commuters).

In the longer-term;

- Belfast and urban economies generally, should return to enjoy growth as demand for 'graduate-hungry' tradable business service workers continues to grow.
- Over the period 2010-2020, all sectors in Belfast bar manufacturing (due to general long term decline) and public administration are predicted to grow in net job terms.
- Belfast's contribution to total NI net employment growth is forecast to increase from 23 per cent (1998 and 2008) to 28 per cent in the long-term 2010-2030 (commuters are still assumed to take a high proportion of jobs).

Within a higher growth scenario it is assumed that strategic sites such as Titanic Quarter and North Foreshore are fully developed. Under this higher growth scenario total employment is higher by 15,000 in 2030 and net commuting, in the absence of any remedial strategies, higher by 8,000.

Whilst it is anticipated that the service sector will provide the majority of additional jobs, the draft Economic Strategy for Northern Ireland also highlights potential for growth, both in manufacturing as well as services, within the following growth sectors;

- Life & Health Sciences
- Advanced Materials
- Advanced Engineering
- Sustainable energy / green economy.

These sectors strongly correlate to the three zones of economic activity identified in Belfast (**Figure 1**) and there should be further focus on these zones and connections to them in order to maximise benefits for the Northern Ireland economy.

Three zones of economic activity exist in central Belfast

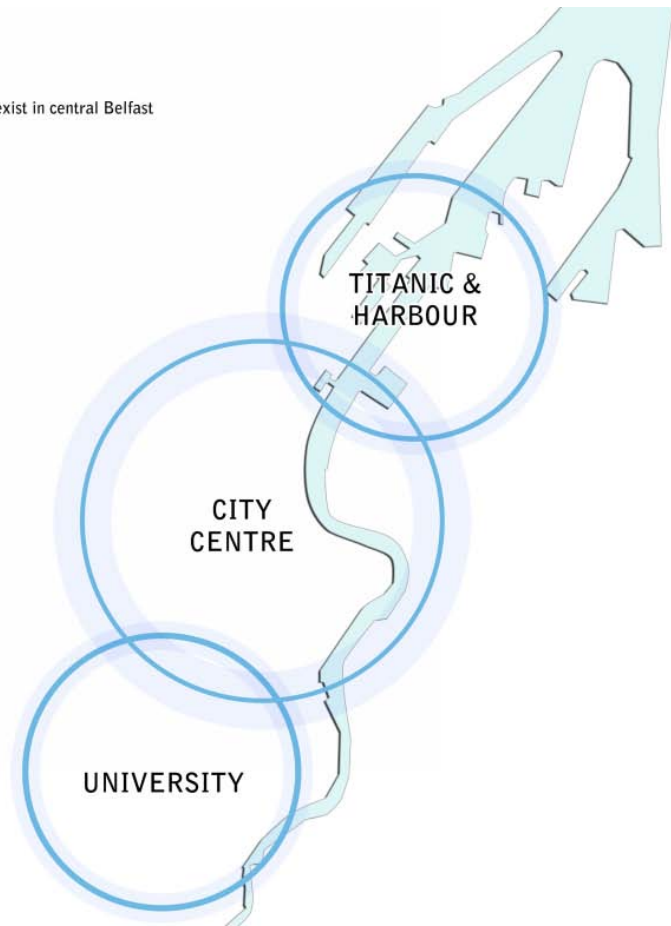


Figure 1 Zones of Economic Activity

## 2.3 Belfast's Population

In 2001, the population of Belfast (Local Government District) was 277,391 with a population density of 24.15 persons per hectare. In 2008 Belfast was estimated as having a population of 267,742<sup>3</sup>, which represents a decrease of 3.6 per cent from the 2001 Census figure of 277,391. After a period of sustained population loss, Belfast's population has begun to stabilise. Between 2004 and 2008 the city lost only 0.6% of its population compared with almost 12% in the previous 20 years.

Despite the 2004 Masterplan's ambitious targets for population growth and given all that has transpired since then in term of economic turmoil one key positive underlying driver for Belfast is the recent stabilisation in population and the long-term forecast for moderate population growth.

Given the long term decline spanning decades, population stabilisation for Belfast is an achievement. It suggests Belfast is becoming a more attractive choice as a place to live as well as work, which is further evident from the growth of the 15-24 population and more recently the 25-34 age group. This increasingly young population will improve Belfast's capacity to attract investment.

The population of Belfast LGD is projected to be 249,834 persons by 2021<sup>4</sup>- this is based on the 2006 mid-year estimates of the population (NISRA). Stabilisation may therefore give way to further significant falls in population with associated implications for the city, in terms of service provision, public transport, and the take up of vacant and derelict land. The masterplan will drive a strategy focused on consolidation and realising the full potential of the city's urban capacity to achieve longer term growth objectives.

Background trends also include a slow decline in household size and population density (people per square kilometre) between 1991 and 2006. By 2008 however, the population of Belfast had begun to steady itself and actually saw a slight increase in population and therefore also its population density. Although not evenly spread throughout the city, Belfast's population density grew by 0.35% between 2006 and 2008. By comparison, over the same period, the outlying area of Carrickfergus had a population density growth of 19.7% while Lisburn had density growth of 11.8%.

Continued falls in population of between -36.7% and -5.4% and -5.4% and 0.0% are generally located within areas of west and south west Belfast such as Crumlin /Ardoyne, Andersonstown, upper Springfield/Whiterock, Greater Shankill, Inner North, Falls / Clonard, the south east and Upper Ardoyne / Ballysillan.

This population loss largely correlates with those areas that experience the highest deprivation levels and that are subject to neighbourhood renewal strategies as advanced by the DSD's Strategic Regeneration Frameworks. Careful consideration should be given to the density of future development and regeneration in light of the longer term objectives for city growth.

Population increases are also area specific with future increases relating to significant housing allocations e.g. Titanic Quarter where 5,000 new homes are anticipated. Within

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<sup>3</sup> NISRA, Small Area Population Estimates 2008

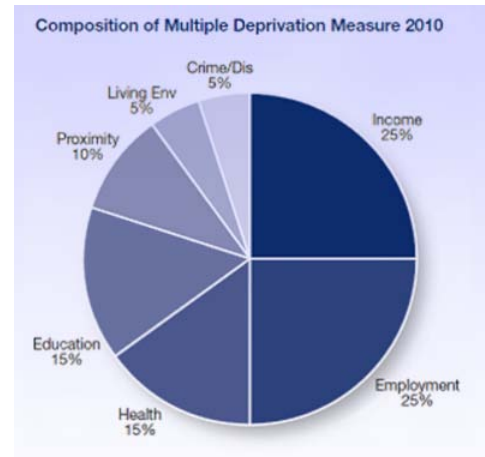
these areas there will be a need to anticipate future requirements for community and social infrastructure, appropriate to the scale of anticipated growth.

### 2.3.1 Deprivation Levels

Embedded within the strategy of the 2004 Masterplan is the objective of realising change in the most deprived parts of the city. However, communities in Belfast continue to record significantly high deprivation levels as measured by the indices of multiple deprivation (IMD) (See Figure 3), updated in 2010, and are likely to undergo additional pressure as a result of the economic downturn.

The IMD is a weighted combination of the seven deprivation domains (See Figure 2);

- Income
- Employment
- Health Deprivation and Disability
- Education Skills and Training
- Proximity to Services
- Living Environment
- Crime and Disorder



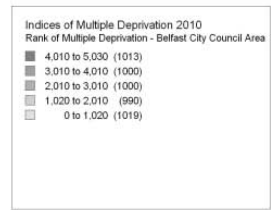
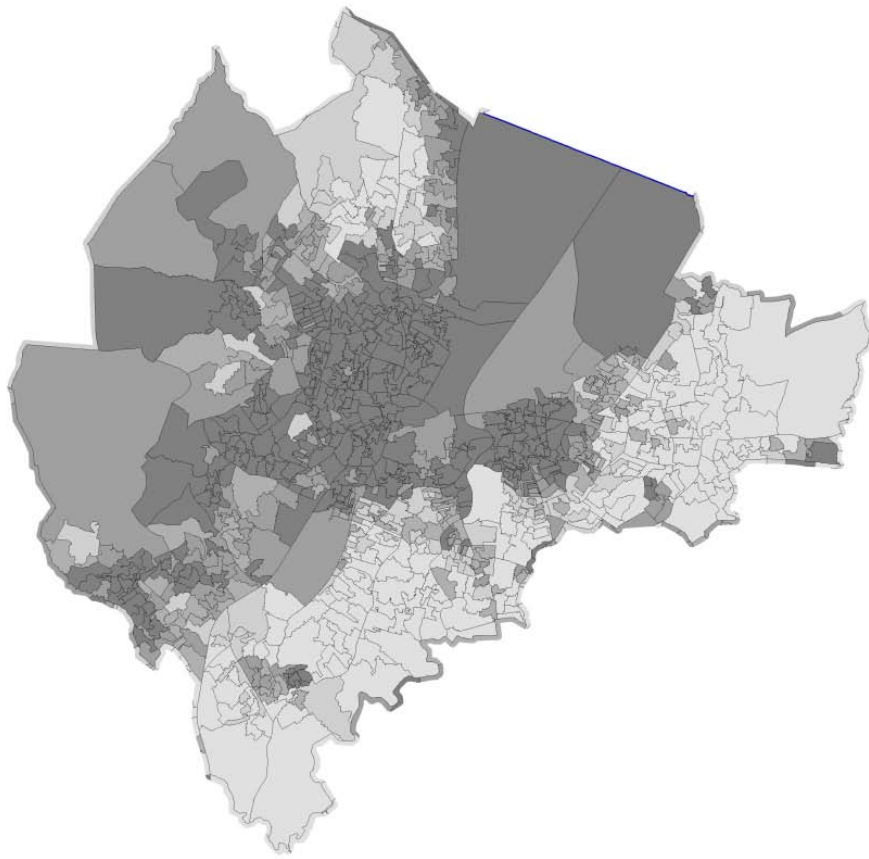
**Figure 2 Composition of IMD (Source NISRA)**

A direct comparison of the deprivation index between 2004 and 2010 is limited due to the inconsistencies in indicators used but the bottom line appears to be that there has been very little change.

The evidence shows that many parts of Belfast unfortunately remain 'untouched' by recent economic growth with 47 of 51 wards (at the time of the research) below the government target employment rate and 12 wards projected to have employment rates of under 50 per cent by 2015. (It is indeed likely that this latter number of 12 will rise further as the forecasts were made during more favourable conditions). (NISRA)

It is anticipated that the increasingly 'skills hungry' nature of future economic growth will see the same neighbourhoods which are deprived today struggle with low employment rates for the medium term with corresponding impacts on population health and wellbeing. Continued deprivation is likely to reinforce issues such as fuel poverty, which at 44% in Northern Ireland and in 45.4 % in Belfast (2009) is a serious challenge. Income is one of the major factors contributing to fuel poverty, with pensioners being particularly vulnerable given their high level of benefit dependency.

Issues of equality, skills and access to employment will be important to neighbourhoods in the future. In light of weakened economic circumstances, addressing wellbeing and quality of life issues relating to deprivation is likely to need a refreshed and alternative approach, distinct from singular physical development projects, but led by a more holistic framework encompassing skills development, environmental quality improvements, developing beneficial or meanwhile uses for underused space, supporting social economy projects and reducing living costs through energy efficient refurbishment programmes.



**Figure 3 Indices of Multiple Deprivation 2010**



## 2.4 Belfast City Centre<sup>5</sup> Performance

The 2004 Masterplan strategy placed great emphasis on the development of the city centre to the wider competitiveness offer of the city. There continue to be issues and trends that are affecting Belfast's city centre future performance which must be addressed at city regional and city level in order to reinforce its multi functional mixed use role at the centre of the Northern Ireland region.

### City Centre Challenges

- Maximising the regenerations opportunities and impacts at a variety of levels such as the potential offered by the relocation of the University of Ulster campus to the Cathedral Quarter.
- Managing the impact of major edge of centre and out of centre development such as Sprucefield and to a lesser extent TQ (employment and activity displacement).
- Understanding the extent of vacancy and dereliction in addition to the distribution of NAMA's Belfast portfolio<sup>6</sup>; this will help to develop a cohesive approach to reconnecting and regenerating the city.
- Protecting the historic environment & bringing buildings at risk back into use through positive measures and policies.
- Protecting and enhancing vitality and viability in relation to retail, commercial uses, and city centre living.
- Addressing blight in the Shaftsbury area and the potential for positive connections.
- Maximising the benefit of Belfast Rapid Transport; ensuring that rapid transit is providing high quality access to and linkages between jobs, hospitals, schools and colleges in different parts of the city and where possible supporting the regeneration of areas along the proposed alignments.
- Addressing deficiencies in open space within the city centre, particularly in areas where city centre living is anticipated and viable.
- Improving urban design, encourage area based assessment and management,
- Coordinating stakeholder activities.

### 2.4.1 Retail

Retail in Belfast accounts for 19% of jobs and serves a catchment population of 1.8 million. Despite recent developments of Victoria Square, DSD reports that there is a need for more retail capacity (by reusing existing underutilised buildings and spaces) in the city centre over the next 5/10 years as projected in 2004.

The total requirement identified is 1.3million sq ft (including Victoria Square; 800,000ft<sup>2</sup>) which conflicts with recent market analysis suggesting that conditions in the retail sector remain particularly difficult, with falling demand due to the cumulative effects of the economic context and changing shopping habits (online shopping and out of town).

At the regional level, a survey carried out by Lisney<sup>7</sup> which assessed the percentage of available units across prime, secondary and out of town locations, suggests that high levels of retail vacancy will continue to suppress rents. This study also highlights;

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<sup>5</sup> A Review of the City's Rates Revenue November 2011 Belfast City Council

<sup>6</sup> NAMA have announced that approximately €4bn or 5% of their portfolio is located in Northern Ireland with approximately €2.4 billion of the Northern Ireland assets comprising development land. One third of NAMA's portfolio in Northern Ireland is located in Belfast.

<sup>7</sup> Retail Update - High level of retail vacancy will continue to suppress rents, Lisney, September 2011

- A polarisation of prime and secondary retail pitches throughout NI, with 60% more available units within the secondary pitches, due to the large drop in rents.
- Vacancy rates of 14.4% (NI) and 18.1% (Belfast, ranking 4<sup>th</sup> out of 17 towns) (UK average is 11.2%)

In the medium term, Lisney also predicts that rents and vacancy rates within the prime retail pitches in the major towns and cities should stabilize however further erosion of rents and more voids will be experienced in secondary retailing locations unless measures are taken to diversify the offer, improve footfall and the physical environment for both visitors and residents.

## 2.4.2 Tourism

2009 tourism figures record 1.7 million overnight visitors, 3.9 million bed-nights and £245 million to the economy. This progress will be further enhanced by the completion of Titanic Belfast and Metropolitan Arts Centre, the refurbished Ulster Museum, Ulster Hall, the new Lyric Theatre and Crescent Arts Centre.

In March 2011 Belfast City Council also published an Integrated Strategic Framework for Belfast Tourism 2010 – 2014 to develop the potential of tourism for the city. The Framework identifies a number of threats and weaknesses to the tourism economy relevant to city development;

- Public places and streetscapes are not consistent in quality
- Lack of café culture
- Poor transport links between attractions and tourist facilities
- No integrated conference and exhibition facilities
- Limited street entertainment and animation
- Security and safety perceptions
- Location of the Belfast Welcome Centre
- New buildings and development not developed to architectural excellence

In relation to tourism's spatial dimension the framework states

*A city's spatial configuration and qualities are key factors in how it is experienced and enjoyed by visitors. City tourism experiences are more than a collection of attractions, events, entertainment and shopping. They are a product of the totality of the urban experience. This includes the quality and character of the physical landscape, the vibrancy of the cultural environment and the presentation of the city as an accessible and connected place. In this way, the city is more than the sum of its parts for both the visitor and citizen.*

It further states that, **the visitor experience can be enhanced and is directly affected by a number of key spatial principles:**

- The quality, variety and vitality of public spaces such as streets and squares and the degree of shared 'public life' that is created;
- Access to and use of natural assets such as the River Lagan and the Belfast Hills
- Access to and presentation of the city's built heritage in the form of buildings of architectural and historical significance and areas of visually and historically important townscape value – Belfast city centre is a conservation area and this must be developed sensitively;
- The degree to which the city's local distinctiveness is conserved and nurtured, including visual landmarks and viewing points;
- The ease with which visitors are able to move around the city, either walking, cycling or by public transport;
- The emphasis and importance placed upon the quality and distinctiveness of new urban interventions both in terms of buildings and public spaces;

- The degree to which different parts of the city are successfully connected by safe, attractive and visually interesting public spaces and access corridors e.g. the River Lagan; and
- The degree to which environmental sustainability is nurtured by projects such as the North Foreshore, Connswater Greenway and the creation of 'green' connections between neighbourhoods across the city.

### 2.4.3 Office space<sup>8</sup>

According to a Review of the City's Rates Revenue (November 2011) the current availability of stock of Grade A and B office space is 1,009,854 sq ft (Grade A – 440,883 sq ft and Grade B 568,971 sq ft). With the average annual requirements 200,000 sq ft (historically 300,000 sq ft) there is a current 5 year supply available with an additional 10 year supply if planning permissions are included. However if the stated requirements of 200,000 sq ft is for Grade A only, this reduces the current supply to 2 years (or 1 ½ years if the annual take-up increased to 300,000 sq ft).

Falling below the optimal five year supply means that there may be a shortage of Grade A office accommodation (including larger floorplates) in Belfast. Currently supply within the city centre is made up of a majority of older Grade B and C as well as recently vacated office government premises such as Oxford House and Londonderry House.

The reuse of existing space (often lower grade office space), the integration of different sectors within the main office area and the provision of supporting infrastructure and environments are challenges for the city centre especially with proposals for new provision on the periphery.

### 2.4.4 City Centre Living

The Belfast City Centre Regeneration Strategy (DSD) recognises the role of inner city living as part of mixed used developments for individual 'quarters'. Since 2004 residential property surrounding the city centre has either been located in a number of long established single identity communities or as part of private gated residential developments. The level of city centre living remains low and as a result there is limited activity in the core areas after business hours.

Potential housing capacity within the city centre is considerable and estimated at 11,500 apartments, of which 3,900 are completed (3,000 private and 900 social), 1,048 are under construction with a further 6,400 apartments with planning approval or have planning applications pending.

A city centre waiting list area<sup>9</sup> has also recently been established and the Housing Executive will be promoting a shared future for social housing within this area. This should be progressed with other measures designed to increase residential opportunity within the city centre and improve on liveability issues such amenity green space and convenience retailing.

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<sup>8</sup> Office buildings within the Grade A bracket are brand new or have been recently redeveloped, or experienced a thorough refurbishment. The properties are prestigious and usually occupy prime locations within major cities. Along with the standard of the building itself, Grade A offices will also possess high-quality furnishings, state-of-the-art facilities, and excellent accessibility.

<sup>9</sup> 2 July 2011 Northern Ireland Housing Executive – Consultation on the establishment of a Belfast city centre waiting list, July 2011

There is a requirement for area based mechanisms to identify areas as the focus for city centre living, and within these areas, to build supporting infrastructure such as education and play space in addition to maintaining quality environments both physically and in terms of air quality and noise.

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potential for improvement exists, particularly in Belfast area, which has historically low car ownership rates. In 2009-10 42% had no access to a car but this figure drops to 21% in outer Belfast. Car ownership profiles translate to underlying demand for public transport. For reasons of social inclusion, if not transport policy and air quality, the city needs to address this.

## **Public Transport**

Translink report that some 80 million passengers are carried by public transport per year (annual Review 2009/10); and that there has been significant investment in new buses and train rolling stock.

Performance in terms of punctuality and reliability of the bus and rail services is reasonably good with 97.5%/ 98.5% achieved on NI Rail and 95.5%/ 98.0% on Metro/ Ulsterbus respectively.

Innovation also appears healthy in Translink and the introduction of integrated fares and ticketing should bring benefits. Smartcard technology is also moving towards mobile phone based ticketing and the view is that along with competitively low priced ticketing Translink is working comparatively well in the public transport sector to improve services and attract patronage.

Notwithstanding recent investment and innovation, patronage on public transport in the last two reporting years shows a worrying downward trend with negative growth shown on bus and train in 2009/10. While this trend is broadly in line with many other cities in the UK, in Belfast it is exacerbated by an oversupply and often free quantum of city centre car parking, and the fact that until recently there has been a notable absence of strategic bus priority and the enforcement of that priority.

## **Road Traffic**

The 2004 Masterplan made much of the city's over provision of road space and criticised this as a major constraint on evolving a sustainable transport strategy.

This review has not had the benefit of an in-depth study of travel patterns and flows which would reveal trends at the macro and local level. Despite this constraint, an analysis of recent 'link' flows in addition to a number of key indicators of traffic on the highway network in and around Belfast City was undertaken with a view to establishing whether Belfast has an adequate transport network to serve its economic and social needs.

Belfast has a classical radial layout of key routes supported with a few important inner and outer radial routes. The City has three main road arteries leading to the city centre:

- The M1 motorway to the South/ A12 Westlink
- The M2/ M5 motorway to the North and West
- The M3/A2 to the North West and Bangor

DRD analysis of average flows and morning and afternoon peak flows, concludes that even with conservative theoretical flow capacities, there are only eight locations where traffic flow comes close to or marginally exceeds theoretical capacities.

Given the oversupply of road space asserted in the 2004 Masterplan there remains significant doubt as to whether Belfast's congestion problem needs to be solved further road building. There will always be a case for some local improvements but arguably the traffic

problems listed above are experienced during relatively short periods at peak flows and can be may be attributed to junction design capacity and the demand for end trip parking.

Therefore the underlying issue for Belfast in transport planning terms is the current and upward pressure created by car use which in turn is fuelled by other supporting factors principally parking supply and a lack of public transport priority and accessibility.

The preparation of a city centre framework plan should incorporate a detailed review of parking and provide for the release excess capacity.

### **2.5.1 Belfast Rapid Transit**

A Belfast Rapid Transit scheme was mooted in early work done for the 2004 Masterplan. From the identification of latent demand grew the feasibility study (Atkins, KPMG, Strategic Outline Case 2008) which identified that a bus based system would be more economically efficient than a metro system although future conversion would not be precluded.

In large part this project is designed not only to satisfy demand along key corridors but also to offer a transport system that would be attractive to potential new users. The scheme may be some years away from implementation and potentially it could be 2015 before any work on physical delivery could begin. The conditions that justified the Rapid Transit Scheme are unlikely to have changed since development of the business case and, if anything, with a change of focus to take account of climate change the case today will be stronger. It also appears that consideration has yet to be given to the development of strategic park and ride sites that would be positioned to compliment the scheme and boost ridership.

Whilst the CITI Titanic Quarter extension to City Airport route was found not to achieve an economic case and therefore dropped as an option, proposals to extend the City Airport runway may mean that with further analysis the case could be improved. The potential runway extension brings with it significant issues. The extension to the Rapid Transit system may neatly resolve transport concerns associated with the project or the expansion in passenger numbers.

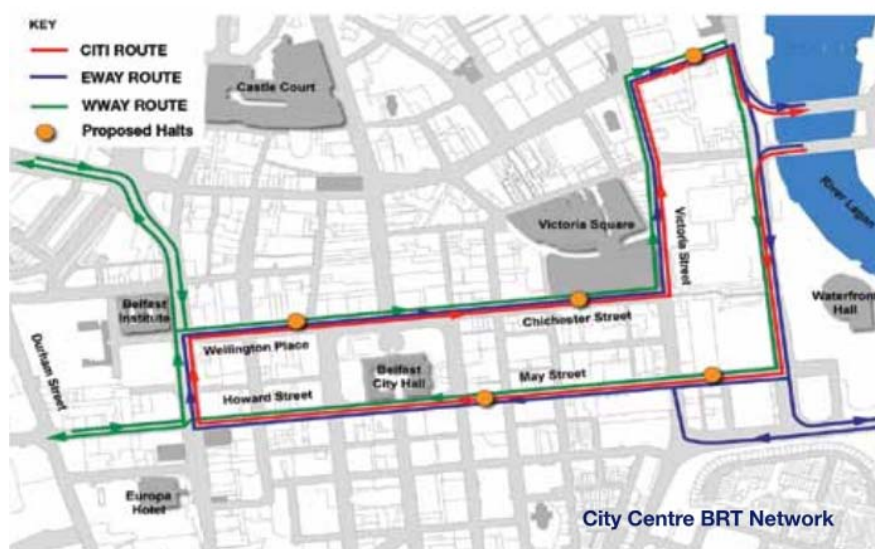


Figure 5 Bus Rapid Transit Scheme – City Centre Route

## 2.5.2 Car Parking – Supply and Demand

Establishing the car parking supply in cities is notoriously difficult. Aside from the many privately run and sometimes unauthorised car parks occupying derelict or brownfield areas there is the private non-residential car parks (PNR) provided by businesses, hotels, etc.

Belfast is no exception to the difficulty of capturing the quantum and indeed there is a sense that because of the special circumstances in Belfast that there are many car park spaces not readily identified and thus not factored into this, or potentially other, appraisals. This potential underestimation of car parking supply would have the effect of an underestimation of the forces driving car use.

The sense of car parking availability in Belfast is that it is prolific. Since 2004 there have been an additional 17 off-street or multi-storey car parks opened in the City. This has resulted in a 92% increase in off-street and 29% increase in multi-storey car parking space availability.

Table 1 Belfast Car Parking supply 2011

	2011 Car Park Spaces	Change since 2004	%
<b>Total</b>	11511	3857	50%
<b>Off street</b>	3984	2005	92%
<b>Multi storey</b>	7074	1609	29%
<b>P &amp; R</b>	453	243	100%
<b>TWWA Population</b>			855,000
<b>TWWA Pop'n in Employment</b>			357,122
<b>Ratio of Population per CP Space</b>			74.3
<b>Ration of Resident Employment Population Per car park space</b>			31.0

The information in **Table 1** has been drawn from a number of publically available sources. However this is likely to be an under estimate as the quantum of provision is difficult to confirm.



Not only is there ample supply of car parking space available the cost of car parking both off-street and on-street is comparatively cheap by UK city standards. Off-street car parking charges have a wide range of costs. They range from £2.50 to a common £6-£8 per day; Hourly charges can vary from 50p to £1.90 per hour.

Of the 60 car parks identified in Belfast 22 were within 10 minutes walk of the city centre. Two Park and Ride sites at Great Georges Street and Bridge End provide an additional 453 spaces. This number of P&R car park spaces is very low and can be contrasted to other UK cities e.g. Edinburgh with 4,043 spaces in six sites further from the city core.

## **Walking and Cycling**

Pedestrian accessibility is an important component in the fabric of any successful and thriving city. The ease of movement and accessibility for pedestrians and cyclists is key when encouraging a pleasant and inclusive environment. In 2003 the DRD published 'Walking in Northern Ireland: An Action Plan'. The documents main purpose was to set out a comprehensive 10-year action plan which will assist in the delivery of improved conditions for walking. The overall objective of the 10-year action plan is:

- To provide opportunities for walking, which are safe, which contribute to the promotion of healthier lifestyles and which are integrated with other modes.

It is hoped that the 10-year action plan will go some way in encouraging people to walk or use public transport for shorter journeys where perhaps previously they may have taken the car, and also to promote the health and leisure benefits which walking can produce.

The Regional Transport Strategy (RTS) 2011 public consultation document also recognises the importance of active travel can play in addressing the identified high level transport aims, as listed below:

- support the growth of the economy;
- enhance the quality of life for all; and
- reduce the environmental impact of transport.

The RTS 2011 public consultation document highlights that there has been some increase in the number of people walking in Belfast but the trend across the region is downward. Figures for cycling show an increase of 57% in 2008 compared to 2000 figures. The 2002 RTS however, had aimed for a 100% increase in cycling by 2005 and 400% by 2015.

There are a number of cycle paths, both on and off road, throughout Belfast, yet the cycle network is disjointed and limited with few substantial stretches of cycle paths. Most cycle paths are small and unconnected to other cycle routes. Similarly, throughout the city centre of Belfast there are few areas of dedicated space for cyclists, with exception of the off-road route along the River Lagan; when in the pedestrianized area of the city centre, cyclists are instructed to dismount and push their bicycles. The Belfast Metropolitan Transport Plan (BMTP) proposed the installation of two pedestrian/cycle bridges within Belfast city centre to serve key activity spines between the east and western sides of the River Lagan. These bridges will go a long way in improving connectivity and access into the city centre for active travel users.

Walking and cycling initiatives have been given some air in Belfast and there is evidence of increased activity by these 'modes'. The signage and way finding examples evident in the city centre that are of particular help to tourists. There was also considerable evidence of

new signing initiatives to help with cycling and a network of cycle routes has been developed for the City, Sustrans being particularly active in this area.

It is clear that Belfast City Council has been playing its part in making the city a walking and cycling friendly environment, however around the city centre and on approach roads there are still very few examples of cycling priority/ on-street provision leading to the main bus/ rail stations. The promotion walking and cycling initiatives coupled with infrastructure provision is the key to redressing the balance away from less healthy modes of transport.

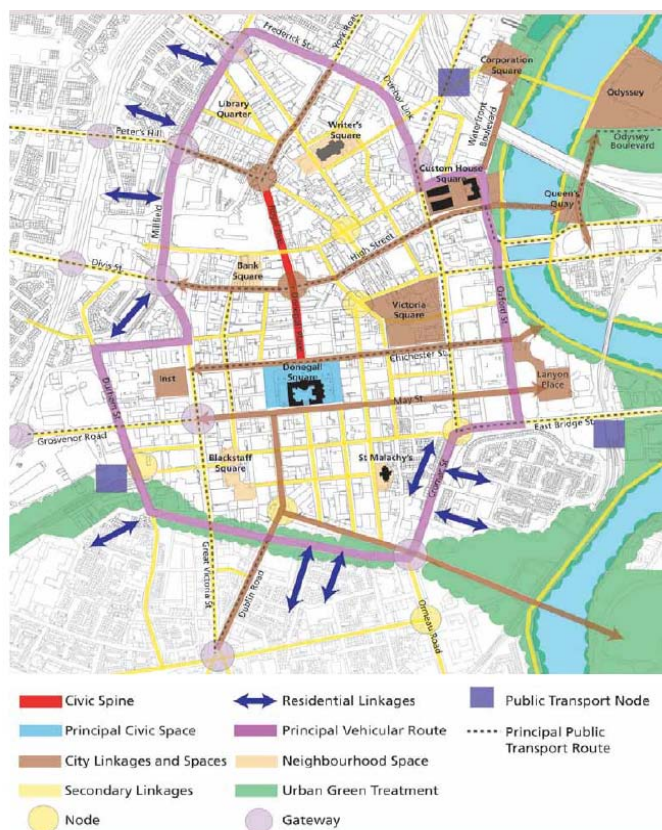
For example, there is no provision for cyclists at traffic controlled junctions and there remains a lack of cohesive network of walking and cycling routes both within and connecting to the city centre. Thus the impression is that there is much to be done to redress the balance of people movement away from car dominance to encourage walking and cycling as a healthy and safe way of travel around the city centre and connections to surrounding areas. Phase 2 of Streets Ahead will provide some opportunities to do this.

### 2.5.3 Connectivity & Public realm

The provision of a high quality Public Realm works was considered is a fundamental tangible part of developing economic and social vitality. The Strategy sought to improve and enhance the physical appearance of the city centre through improved new urban spaces, landscaping landmarks and public art which has been progressed through the Streets Ahead programme. Since 2004, the heart of the city has been lifted through the quality of urban design, the quality of the built environment and most especially the embryonic transformation that high quality streetscape design and pedestrianization can bring.

Nevertheless, it would be unrealistic to expect a total transformation particularly when responsibility for land use, transportation, regeneration and the public realm rests with separate administrative bodies.

Belfast City is ringed by road space, in some cases six lanes wide, and transport arteries flowing close to the city heart are a major feature. Limited progress has been made in reducing the amount of this space in favour of better quality pedestrian environment. Indeed, further significant negative consequences of realising an inner ring road, a practice that has been abandoned by many comparable cities, is persistently pursued. There is potential for this to be addressed through Phase 2 of the Streets Ahead programme.



**Figure 6 Belfast City Centre Regeneration Strategy (DSD)**

## **2.6 Validated Thematic Issues**

The original Masterplan strategy, set out five objectives for change, referred to as the imperatives or priorities for change. These are

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

A summary of progress in relation to each of these objectives is provided overleaf.

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Table 2 A summary of progress on these objectives

<b>2004 Masterplan Objective</b>	<b>Progress</b>	<b>Revised Targets</b>
Grow the City	Belfast has stabilised its long term decline but has not succeeded in achieving the levels of growth set out in 2004. The impact of the recession on investor confidence together with a commitment within the draft RDS to a polycentric growth model for NI will further undermine this objective and make it difficult for the city to grow its residential population.	Population growth remains a long term objective for the city's regeneration.
Develop the City Centre	<p>The City has made substantial progress in rebuilding its central core with an impressive delivery of public and private sector projects.</p> <p>Spatial cohesion, tensions with the harbour estate/TQ, public transport access and achieving a viable residential capacity remain the key challenges.</p>	Maintain priority on City Centre and protect the city's position as the service, retail, culture and tourism capital of NI. Progress a city centre framework plan to address cohesion and develop a vibrant multi functional space at the heart of the city region.
Develop the New Industries	The 2004 masterplan targeted the knowledge based sector with the Universities leading innovation through companies such as QUBIS, the technology commercialisation company at QUB (which has established over 60 new companies) and the NI Science Park Foundation. A sub set of this aspect of the city's strategy was to grow the creative industries sector. There has been considerable success in this area aided by the development of a formidable visitor and evening economy for the city.	<p>Build on success by greater alignment of new industry sectors and a strengthening of the city's learning and skills offer.</p> <p>Broaden into the concept of a 'Learning City' harnessing the potential of universities to enhance innovation and skills.</p> <p>Develop a new focus on the clean technology and green energy sector as an international business area capable of expansion.</p>
Provide Land for Employment	The 2004 Masterplan reflected the need to ensure an adequate supply of land to accommodate the city's traditional manufacturing and distribution industries but it also stressed the importance that the City Council and other public sector stakeholders use their land assets in an integrated way to springboard regeneration activities across the city.	<p>Despite progress there remain substantial publicly owned land banks in the centre city and the city neighbourhoods that could be assembled to help unlock key development opportunities. This remains a key objective for the masterplan</p> <p>Consider new funding and implementation models (such as that provided for under Community Planning and Wellness provisions) for key city locations such as:</p> <ul style="list-style-type: none"> <li>• The University of Ulster Campus north and west of the Cathedral Quarter</li> <li>• Shaftsbury</li> <li>• The lower Divis and West Link area</li> <li>• Adjacent to the new stadia projects at Windsor Park &amp; Casement</li> </ul>

2004 Masterplan Objective	Progress	Revised Targets
<p>Simplify City Governance.</p>	<p>Belfast City Council continues to have limited statutory powers to drive change. In contrast to other cities of a comparable size, decision making in relation to strategic planning, development management and regeneration in addition to roads and transport policy lie elsewhere.</p> <p>Business support in the City remains divided in terms of responsibility including Invest Northern Ireland (INI) and Belfast City Council (BCC) addressing local economic development issues.</p> <p>5 Area Based Partnerships (ABPs) in Belfast which relate both to the Belfast Regeneration Office and Belfast City Council and seek to form a communications bridge between their local communities and city-wide issues.</p> <p>The area based partnerships are also forming a relationship with the Belfast Local Strategy Partnership (BLSP) which has responsibility for administering support to the social economy.</p>	<p>Relationships and coordination between agencies is considerably advanced on its 2004 levels, largely because of the leadership of the City Council and the workings of the devolved government.</p> <p>Greater alignment is still needed given the imminent devolution of planning and transport functions under RPA and the new Planning Reform Bill.</p> <p>There remains an absence in organisational capacity to address strategic issues at the level at which they occur; particularly at city region level. (e.g. the energy from waste project and regional transportation infrastructure). The Council needs to frame an appropriate mechanism for dealing with this as part of a refreshed partnership approach with government.</p> <p>The Council needs to be vigilant of a lack of coordinated planning decision making resulting in a fragmented built environment across the City. As a result, there are opportunities to extend partnership working to implement agreed policies. The availability of Urban Design skills within the Council Development Department remains a justifiable action to assist urban leadership and transition under RPA.</p> <p>There is currently no up to date plan that enjoys sufficient statutory powers to implement change. The city Council should begin dialogue with the DOE to begin work on An accelerated replacement for BMAP that would be in place by 2015.</p> <p>Future opportunities will arise from the Review of Public Administration (RPA) which will revise organisational structures and the delivery of public services. There are issues around the speed of decisions and the ability of organisations to react to challenges.</p>

## 2.7 The Spatial Plan Review

The economic, social and community imperatives set out in the original 2004 Masterplan, particularly growing the city and developing the city centre required a fresh understanding of the spatial configuration of the city of Belfast.

The masterplan position maintains that **Belfast is a concentric city** – essentially circular in nature with a well defined and concentrated central core surrounded by the city's residential neighbourhoods that all link to the centre via a network historic radial routes. This analysis remains sound and indeed has been validated by the patterns of investment witnessed over the last decade. The potential exists for these neighbourhoods to support local hubs or their establishment through initiatives such as Casement and Windsor Stadia. The city is not polycentric i.e. it does not have a range of competing or sub centres but rather has one single and quite dynamic core - a core that serves the whole city and the entire region as the crucible of economic activity for Northern Ireland.

The masterplan defined the concept of **an economic corridor** extending from the harbour lands in the north, to the University complex in the south, bound by the River Lagan to the east and the Westlink to the West. This zone was described the most dynamic economic space in the region.

The **harbour lands** to the north of the centre city were in a transitional state in 2004 offering a vast undeveloped area for mixed use development that showcased industrial heritage of the city. The Masterplan predicted that the integration of the harbour lands with the central core of the city 'will preoccupy the physical planning of the city for years to come'.

Further opportunities for development were provided by a number of **strategic sites at the eastern fringe** including the Gasworks, Waterfront, Sirocco and East Bank; some of which have seen development whilst others are awaiting development and regeneration.

The **southern** area of the corridor accommodates possibly some of the strongest economic drivers in the region in the form of **Queen's University** and the bio-sciences centres of excellence at the **City and Royal Victoria Hospitals**.

Extending from the Harbour Estate to the University and hospital area, the corridor contains the region's leading academic institutions, its prime retail centre, its prime office location, its traditional manufacturing heartland, its cultural focus, its international port and arguably its most promising international tourist product at Titanic Quarter. This corridor is the single most preferred location for foreign direct investment in Northern Ireland. It represents, Northern Ireland's window on the global economy. However, within this economic climate a consolidated focus on the defined city centre is as important as developing cohesion and connectivity.

The retail and commercial core is the heart of the **city centre** where development progress since 2004 is most evident. The area allows for a combination of retail and non-retail uses and is now the primary focus of the city's highly successful visitor and tourism economy. As the prime shopping area of Belfast, it also accommodates prime office space and has the potential to become a thriving mixed use area. The primary challenge in the core is to ensure **physical cohesion and utilisation of heritage assets** in the coordination and delivery of key projects and to continue to build its capacity to host a diverse residential population.

Unlike other cities, Belfast does not have an outer city - a product of the physical constraints of its position with the Antrim Plateau to the north and the Castlereagh and Holywood hills to the south, constraining the city within the Lagan Valley. The surrounding boroughs of Lisburn, Castlereagh and Newtownabbey provide Belfast's outer city. However, beyond the

centre city, the area is dominated by the network of **urban villages** that make up the city's neighbourhoods such as - Belmont, Ballhackamore, Hollywood Exchange, Cregagh, Rosetta, Ormeau, Malone, Finaghy, The Village, Andersonstown, Ballymurphy, Divis, Shankill, Cliftonville, Ardoyne, etc. A significant number of the city's neighbourhoods rank highly in relation to deprivation especially for low employment, health, skills and income levels.

The 2004 Masterplan analysed the complexities of the neighbourhood, around five sectors, inventively entitled North, South, East, West and Shankill sectors. These were based on the five Area Based Partnerships and have since been adopted by DSD as the template for their **five 'Strategic Regeneration Frameworks'** (SRF's) which are now in place. The SRF's have provided a valuable area based agenda for the neighbourhoods but they have not been fully integrated to provide a genuine citywide perspective on strategic regeneration priorities. This is particularly evident given the number of strategic sites, which remain vacant or derelict.

Thus the ongoing challenge of the Masterplan, in the absence of a development plan or city focussed strategy, remains to effectively merge these local frameworks and link the neighbourhoods to the centre city to facilitate the gradual change from a fragmented city to a holistic, regenerated urban area of international stature. This in turn requires that the masterplan establishes some priorities and identifies those projects that can best deliver the potential for genuine city wide impacts across a range of indicators

There remains a **need to refocus the city to develop sequentially**, enhancing the carrying capacity of the centre to create a dynamic and vibrant urban focus capable of attracting people and employment and a diverse range of supporting services.

In the 2004 Masterplan, much was made of the compact city approach—an approach based on a number of essential components, including minimum densities; mixed use and integration of land uses; a hierarchical concentration of development in nodes within the centre city; transformation of urban mobility and orientation of future urban development around existing transport routes. Whilst much of this remains pertinent to Belfast's core objective of growing its population, it is not possible to rest on previous assumptions around population growth and density, due to falling numbers in some parts of the city.

The refreshed masterplan spatial strategy will have to address a few new realities:

- **Population slow down** – Depressed market activity is likely to slow migration patterns and dampen demand for new residential households and the draft RDS strategy will not help to direct what regional demand there is to the city. This will affect investment in all parts of the city but will be a particular issue for the city centre.
- **Vacant Land and Property**– The city still has a lot of brownfield land (much of it in public ownership) and also has a significant supply of vacant offices and apartments that it will have to slowly absorb as economic recovery kicks in. It will also have to deal with new owners such as NAMA (Ireland's National Asset Management Agency) who now control extensive tracts of the city.
- **Core first** - Spatial cohesion is now the primary concern for the centre city. Functional integrity must be the leading theme for consolidating the gains recent growth. What development energy exists should be channelled into making single projects a compelling success. There is a significant absence of green space in the centre city in Belfast which has implications for issues such as environmental quality and amenity but also for its appeal to family households. With the abundance of publicly owned land, there must be opportunities to introduce a new network of pocket parks that would help to provide much needed physical cohesion to key spaces in the city.

- **Re-balanced emphasis away from purely retail-led regeneration** – The city needs investments such as Royal Exchange to help rebuild its streets and to provide a compelling shopping offer as regional capital but there will be limits to the role that retailing should play in building a sustainable regeneration strategy for the central area. A shift in emphasis is needed towards residential, mixed use and community led regeneration for areas such as the Cathedral Quarter (including the University of Ulster campus), the Fountain and Castle Street Area and the critically important corridor of the Shaftsbury Link.
- **New neighbourhood service hubs** – The economic forecasts are predicting that the most deprived parts of the city could suffer most in the next decade without support or targeted action. Parts of the city, particularly greater Belfast (Andersonstown to Shankill), need to rebuild their capacity to perform as service hubs for their communities. These projects have the potential to shape places, deliver significant physical renewal and to deliver lasting and sustainable regeneration if structured properly. These projects will need to be comprehensively tackled early in the plan period to drive change in existing environments.
- **Public transport is getting there** – The city is slowly coming to terms with the fact that a competitive capital city requires a first class public transport system. The new QBC'S are finally giving the Metro a chance and BRT has the potential to transform areas along its routes as well as altering the labour market patterns in the city. New projects need to embrace greater modal shift as essential.
- **Environmental and urban design quality remains an issue for the city.** Good quality design, local distinctiveness and character are hallmarks of the best cities in the UK, Europe and the World. Built heritage has much to offer in terms of create liveable and attractive place that attract skilled professionals and visitors alike. There are over 23 buildings at risk identified within the central area. Further measures to protect and re use these structures needs to be taken if the historic environment is to continue to be identified as a strength of Belfast's tourism offer. This could be supported by positive policies or regulatory environments towards new uses for heritage assets. Quality place making continues to be undermined by the lack of coordinated action in relation to all aspects of the built environment and the number of agencies involved.



## 2.8 Validated Spatial issues

Spatial Objectives	Progress	Revised objectives
1. An Energised Core	Significant advances since 2004 but much to do to improve cohesion and evening vitality.	The city centre remains the prime economic space in the region and must continue to receive priority within the masterplan strategy. This should build on the destination offer improve liveability and focus on environment quality and design issues. Further work is required to progress a city centre framework plan addressing cohesion and developing a vibrant multi functional space at the heart of the city region.
2. A Connected Middle City	Slow implementation of QBC's cycle and walking links but still too many physical severance issues remain. Coordinated action to develop and regenerate the sites that surround the core as a means of reconnecting the city	Continue to support the extension of sustainable transport services and BRT to serve access to the city neighbourhoods and support regeneration. Address severance issues through projects within key development areas
3. Integrated Neighbourhood Renewal	Steady implementation of physical and social renewal projects across all the city neighbourhoods but with little impact on deprivation indicators. Peace lines remain to be addressed.	Impacts of the recession could be hardest felt in areas of multiple deprivation in the city unless there is targeted work to maximise the potential for sustainable regeneration and investment. Maintain as a core priority for the master plan strategy and progress through the DSD's Strategic Regeneration Frameworks.
4. Released Environmental Assets	Clear progress with the Connswater Greenway, Giants Park, Lagan Riverside and greater access to the Black Mountain. Pitches strategy and parks Green Flags scheme.	A shift in emphasis towards the addressing opportunities in the low carbon economy and improving environmental quality and competitiveness. Continued work to integrate city spaces and the surrounding environments.
5. Enhanced Presentation of the City	Main road corridors, major junctions, rail and bus stations have all been improved and the city centre public realm strategy is well advanced. The physical environment of parts of the city has been transformed.	Must remain an ongoing commitment of the masterplan with a strong design influence. Emphasis should now shift from the urban gateway locations to the functional cohesion of the city centre and barriers to mobility.

## 2.9 The Refreshed Masterplan

This table shows the links between issues and the masterplan objectives;

**Table 3 The link between Issues and Masterplan objectives**

<b>Issues</b>	<b>Themes</b>	<b>Revised Masterplan Objectives</b>
<ul style="list-style-type: none"> <li>• High levels of in commuting</li> <li>• Low levels of Walking and Cycling and public transport use</li> <li>• Buses competing with other road users</li> <li>• Air quality</li> <li>• Maximising the benefit of Belfast Rapid Transport</li> <li>• Addressing blight /severance caused by the Bankmore link and other connections</li> <li>• Over supply of parking and absence of demand management</li> </ul>	<p>Effective Transport Policy</p> <p>City Regional Development</p> <p>Integrating transport and land use</p>	<p>Accessible and Connected City</p> <p>Eco City</p> <p>Centre City</p> <p>Neighbourhood City</p>
<ul style="list-style-type: none"> <li>• Urban Capacity</li> <li>• Population growth potential</li> <li>• Falling Densities in some areas</li> <li>• Deprivation including health inequalities</li> <li>• Low skills levels of resident population</li> <li>• Employment accessibility</li> <li>• 45.4% population affected by fuel poverty</li> <li>• Unemployment</li> </ul>	<p>City Regional Development</p> <p>Quality of life</p> <p>Neighbourhood Quality</p> <p>Employment and life opportunities</p>	<p>Quality of life &amp; Wellbeing</p> <p>Learning City</p> <p>Eco City</p> <p>Centre City</p> <p>Neighbourhood City</p> <p>Accessible and Connected City</p>
<ul style="list-style-type: none"> <li>• Derelict &amp; under used land and buildings</li> <li>• Air quality</li> <li>• Understanding the extent of vacancy, dereliction and NAMA portfolio</li> <li>• Protecting the historic environment</li> <li>• Addressing blight cause by the Shaftsbury link connection</li> <li>• Retail vacancy rate – esp. in secondary areas</li> </ul>	<p>Design and Environmental quality</p> <p>Impact of economic downturn &amp; out of centre development</p>	<p>Learning City</p> <p>Eco City</p> <p>Centre City</p> <p>Neighbourhood City</p> <p>Accessible and Connected City</p>
<ul style="list-style-type: none"> <li>• Protecting and enhancing vitality and viability in relation to retail, commercial uses, and city centre living.</li> <li>• Tensions with Titanic Quarter</li> <li>• Address deficiencies in open space within the city centre</li> <li>• Poor transport links between attractions and tourist facilities</li> <li>• The supply of Grade A office space, integrated conference and exhibition facilities</li> <li>• Limited walking and cycling infrastructure</li> <li>• Improving environmental and design quality</li> </ul>	<p>Improve vitality and viability</p> <p>Develop mixed uses areas</p> <p>Improve urban design, environmental quality and infrastructure for city living</p>	<p>Centre City</p>

- 
- Avoid of mitigate adverse impacts of road building proposals e.g. Bankmore link
- 

- Economy that is over reliant on public services
  - Low levels of entrepreneurship
  - High levels of labour market inactivity
  - large numbers of low or unskilled labour
  - Accessibility (i.e. by road, rail or air)
  - Job losses within resident population: employment rate to fall 2% / 6,000
  - The dispersal of lower skilled employment
- |                                     |   |
|-------------------------------------|---|
| Improve skills                      | Learning City                                 |
| Encourage and Support innovation    | Eco City<br>Centre City<br>Neighbourhood City |
| Ensure opportunities are accessible |   |
- 

- Coordinating development and activities
- |  |   |
|--|---|
| Delivery<br>Implementation<br>Cross sectoral working<br>Improving the evidence base<br>Developing SMART objectives | Learning City<br>Centre City<br>Implementation through 'guiding coalitions' and opportunities provided by RPA |
|--|---|
- 

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### 3 REVISED MASTERPLAN STRATEGY 2011-2020

The changed economic context is recognised in that economic recovery will be slow and that investment resources in all sectors will be scarce. However, the priority of developing a strong and growing core city remains the Masterplan's primary focus.

The 2012 review of the Belfast Masterplan is based on identified economic and competitiveness issues and an understanding of development and spatial trends facing the City. It revised objectives around a guiding principle of improving quality of life and wellbeing within Belfast.

#### 3.1 Quality of Life & Wellbeing

Quality of life and wellbeing, has been identified as a cross cutting theme at the heart of this review, reflecting the ongoing issues affecting quality of life in neighbourhoods throughout the city.

Despite economic progress, deprivation within the city, as measured by the Index of Multiple Deprivation (2004, 2010) remains largely unchanged. This compares starkly to those neighbourhoods within the commuter belt of Belfast, where population and quality of life indicators have risen measurably.

Everyone's Involved, Sustainable Development Strategy identified positive progress towards quality of life for everyone as a priority area.

Considering quality of life will also provide a holistic view of city development that extends beyond material wealth to include issues such as health, inclusion and affordability, access to employment and services, security and crime, neighbourhood quality, education, and the environment. It is widely acknowledged that these softer indicators are indirectly linked to competitiveness whereby a high quality of life is a key component in attracting highly skilled and mobile labour as well as retaining high quality graduates and skills which are the output from the city's five higher education institutions.

Whilst it is acknowledged that large-scale urban regeneration is a long term objective, it should be noted that with the current economic constraints, addressing wellbeing and quality of life issues relating to deprivation indicators is likely to need a refreshed and alternative approach.

Alternative regeneration strategies should be specifically tailored to issues facing Belfast whilst having regard to best practice regionally, nationally and internationally. **Appendix 1** outlines key messages delivered during the State of the City debates. These focused on best practice in achieving competitiveness and quality of life as part of city development strategies. Key messages arising from these debates were reviewed according to the spatial and strategic objectives identified for Belfast.

A review of regeneration initiatives within a European context<sup>11</sup> also sets out a number of lessons relevant to Belfast's experience;

- Making the city attractive and user-friendly is an indispensable part of a regeneration and economic development strategy.
- the importance attached to quality in all aspects of the development including the business environment

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<sup>11</sup> Regeneration in European cities Making connections Christopher Cadell, Nicholas Falk and Francesca King Joseph Rowntree Foundation, 2008.

- the commitment to education and job-related training, so that all the city's residents would have access to good jobs
- the long-term persistence and collaborative working across sectors and between different parts of a city-region that are needed to make sure that urban regeneration succeeds.

Ten key elements that underlie successful urban regeneration;

1. recognise that cities are in competition;
2. focus on the wider metropolitan area or city-region;
3. work together across boundaries, sectors and professions;
4. devolve real power and resources to city authorities;
5. provide incentives for sustainable success;
6. create attractive and balanced residential neighbourhoods;
7. invest in high quality infrastructure and public realm;
8. spread the ~~base~~ <sup>benefit</sup> of economic development throughout the community;
9. build permanent delivery organisations and skills; and
10. value the role of culture in regeneration.

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### 3.2 Revised Objectives

Having considered the challenges for the City, the revised strategy is based on a number of development objectives, consolidated from the list set out in the 2004 masterplan. The revised objectives are structured to deliver the long term aspiration of improving quality of life and wellbeing, which lies at the heart of the strategy.

The responsibility for focused delivery will be assigned to 'guiding coalitions' or strategic partnerships. These coalitions will harness the power of the city's institutions and private sector interests to develop collaborative working practices and combine physical assets and monetary resources in the interests of the health of the city and city region.

The updated focus reflects citywide challenges and opportunities, and the need for action to break the cycle of existing trends and issues relating to population growth and economic competitiveness. The Masterplan's primary focus continues to be the protection and improvement of the city core, which will be at the centre of regions economic recovery.

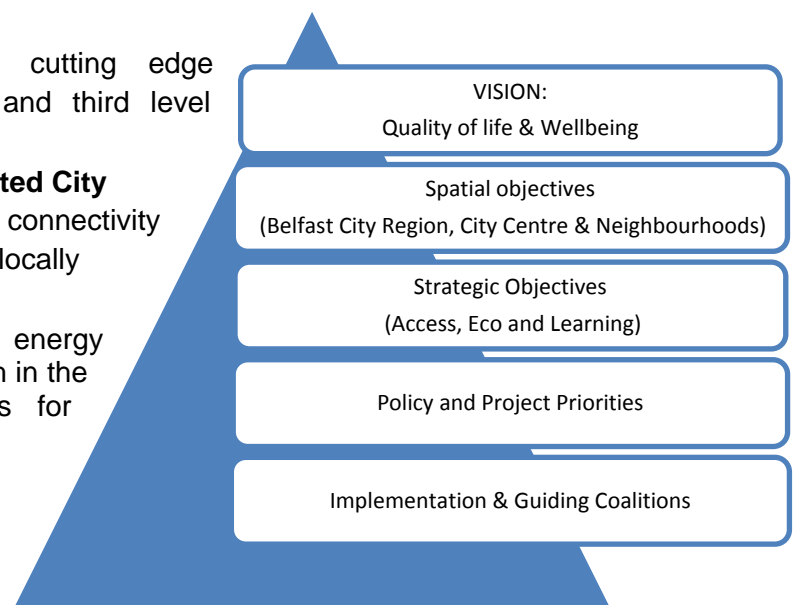
The objectives are split between spatial objectives and strategic objectives;

#### Spatial Objectives

- **The Belfast City Region**  
Working together across administrative and geographical boundaries to deliver the city's growth potential
- **The Centre City**  
A vibrant and dynamic centre city and regional economy
- **The Neighbourhood City**  
Neighbourhoods which provide the focus for community, social and environmental sustainability

#### Strategic Objectives

- **The Learning City**  
Harnessing the power of cutting edge research and development and third level education
- **The Accessible and Connected City**  
Enhancing accessibility and connectivity internationally, regionally and locally
- **The Eco City**  
Clean technology, renewable energy and efficiency will drive growth in the economy and reduce costs for businesses and households.



### 3.3 Revised Spatial Strategy

The revised spatial strategy (Figure 7) focuses on developing an urban policy for the Belfast City Region, the city centre and the neighbourhoods. It prioritises major development for the city centre in seeking to protect and enhance its strategic importance. For developments outside the city centre, optimal outcomes will be sought on the basis of realising the Masterplan's strategic objectives of

- The Learning City;
- The Accessible and Connected City; and
- The Eco City.

These objectives and relevant policy priorities will also be applied, as relevant, to a series of projects at the neighbourhood level.

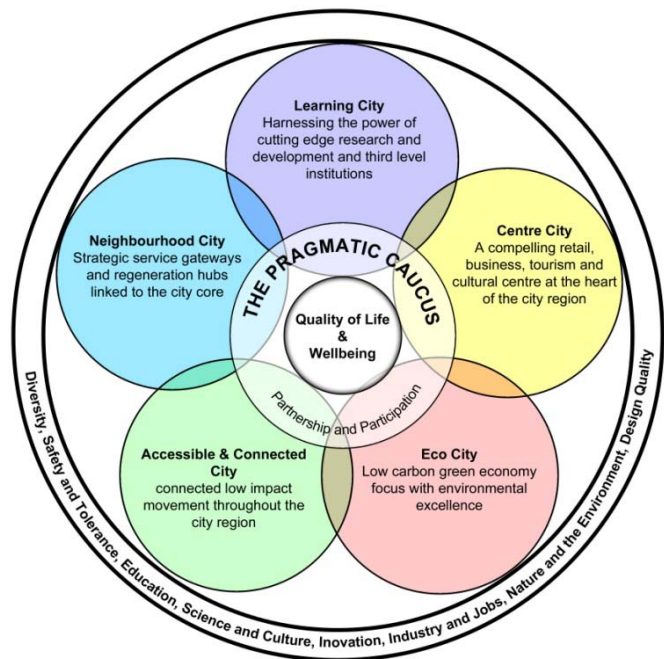
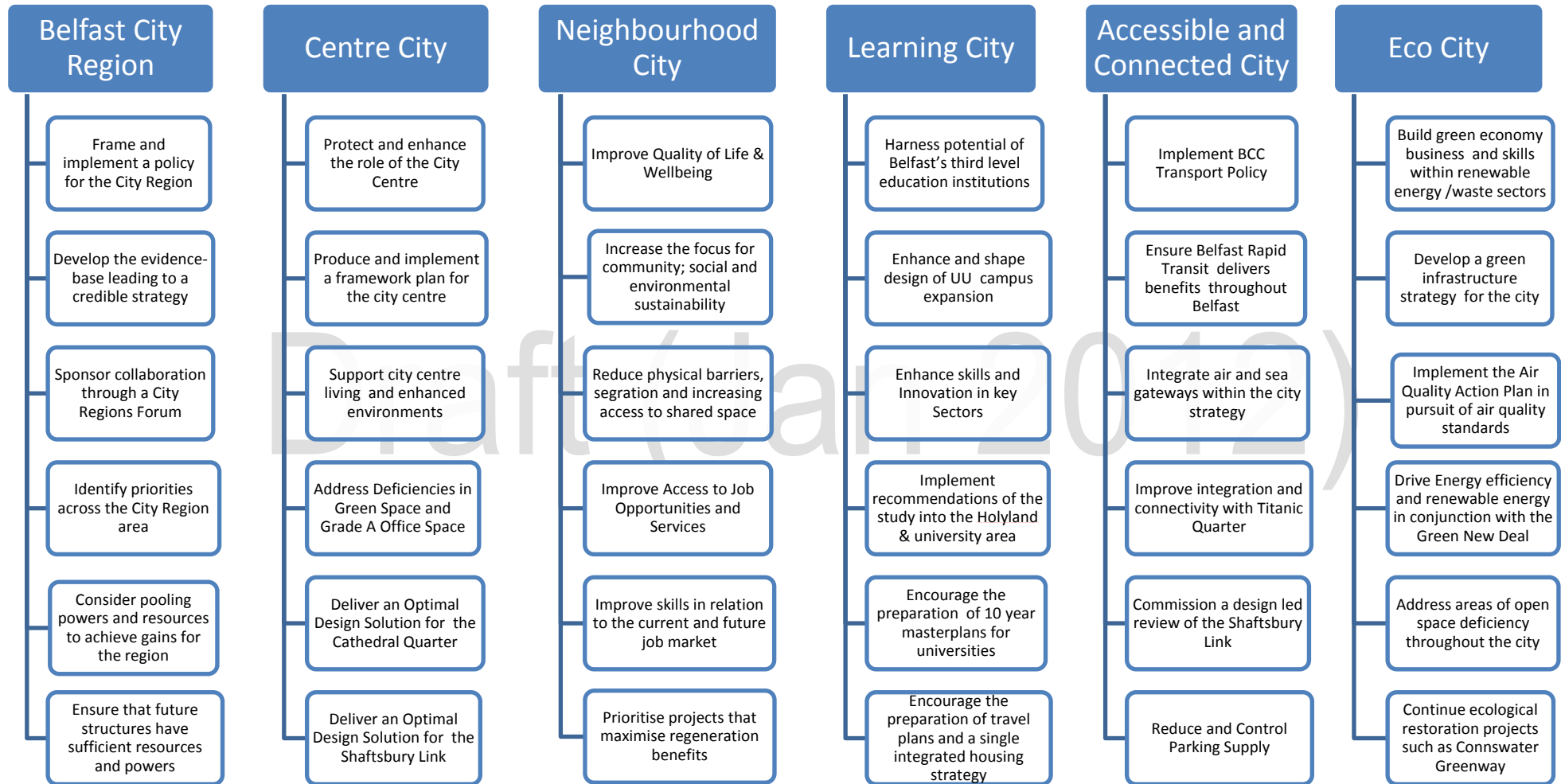


Figure 7 Revised Strategy

### 3.4 Policy Priorities

The review process has identified policy priorities for each of the masterplan objectives and these priorities will deal with specific issues facing the city. Priorities are summarised overleaf and explained in more detail in Chapter 4.

# Policy Priorities





## 4 SPATIAL OBJECTIVES

### 4.1 An Urban Policy for the Belfast City Region

#### Key Messages; Benefits of Developing a City Regional Approach

- Evidence from European and British cities shows that where the level of decision-making is a good fit with a city's economic footprint it is associated with better economic performance
- Cities, not government departments, are best placed to understand the economic opportunities and challenges they face.
- Opportunities for growth extend beyond the boundaries of local authorities, local leaders can pool resources and work effectively across their economic footprint
- Cities need to collaborate with their neighbours to allow effective decision-making and innovative responses to barriers to growth
- A City Regional approach enables and develops a dynamic local leadership to drive economic growth on the ground

#### Background

The past decade has seen increasing recognition of the need for coordination and strategic decision-making across the economic footprint of cities. As with most metropolitan cities across Europe, Belfast's economic geography spreads well beyond its current administrative boundaries with further fragmentation caused by the separation of powers in relation to statutory land use planning, wider economic planning and housing between the Departments of Environment, Regional Development and Social Development.

To date in Northern Ireland, there has been limited progress in preparing placed based strategies at the city regional level despite the wider acknowledgement, ongoing debate and progress elsewhere concerning new forms of planning and governance which are needed to reflect the current reality of urban development.

The existing mechanism of the Regional Development Strategy is ineffective in terms of city regional planning and governance as fails to fully understand its dynamics, identify priorities for growth and coordinate inter departmental policy so the city's issues and opportunities can be best addressed.

Elsewhere, there are a number of examples of planning and governance mechanisms that integrate policies for the city region at this more appropriate spatial scale and accommodate more appropriate administrative and governance structures to realise the acknowledged benefits.

In London, there is the well known and successful example of the Greater London Authority and directly elected mayor which have assumed statutory planning functions and executive powers that enable coordinated planning across the London Boroughs.

Outside London, the Core Cities<sup>12</sup>, despite advances, have made uneven progress in realising their full potential. The most recent policy intentions focus on the economic potential of city regions and the role of Local Enterprise Partnerships (LEPs) ('Unlocking growth in cities', HM Government, December 2011). This report reiterates that cities are the

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<sup>12</sup> The eight core cities are the largest English cities outside London.

most economically important places in the country accounting for 74% of population and 78% of jobs.

Despite their importance and pre recession jobs growth, 'Unlocking the Growth' concludes that core cities are lagging behind their European counterparts and that in most European countries major cities perform at or above their national average. However, in the UK, with one exception (Bristol), they perform below the national average.

'Unlocking growth' outlines a range of options for cities and develops the concept of **city deals** and their role in developing tailored approaches to decentralising significant powers and resources to local authorities and Local Enterprise Partnerships.

LEPs are intended to assume the economic development leadership role previously held by the now abolished regional agencies. However, despite their envisaged role, there are a number of notable policy gaps within their current remit including any formalised statutory planning role.

In addition to LEPs, other measures such as the creation of a Minister for Cities and a Cities Policy Unit have reinforced policy support for city development. The Cities Policy Unit has been introduced to work with city leaders and across central government departments to deliver a new approach to urban policy, designed to provide a tailored service to help cities to work effectively across departmental silos and develop place based city policies.

Previously under the labour government, statutory planning policies to coordinate the development of the city region were accommodated as part of the Regional Spatial Strategies which provided the statutory regional framework for development and investment.

In the northern region, this city region approach was principally enabled by strategies such as the 'Moving Forward: The Northern Way'; a collaborative development plan between the three northernmost English regions, which sought to provide a better understanding of the concept of City Regions.

The Northern Way provided a framework for increasing the economic contribution of the North's eight city regions. This positive role of the Northern Way was reflected in an independent evaluation in 2007. (<http://www.thenorthernway.co.uk/downloaddoc.asp?id=461> Please also see ARUP Spring 2009 report review the work and future role of the Northern Way City Regions Forum.)

As a result of this work sub regional partnerships, which adopted responsibility for economic development, investment and tourism, led the preparation of City Regional Development Programmes which sought to prioritise transformational activities around the drivers for growth of each City Region.

By working across administrative boundaries, prior to the Coalition Government, the city regions provided a clear basis for delivering better economic policy outcomes in areas such as transport, housing, skills, employment and regeneration. City Regions also made good progress by strengthening governance and decision making structures, and developing capacity to work together. Specific measures to address issues of city development were subsequently incorporated within the formalised planning mechanisms such as Regional Spatial Strategies and Local Development Frameworks.

In 2009, pilot statutory City Regions of Greater Manchester and Leeds were announced which will facilitate a formal corporate strategic government with powers comparable with the Greater London Authority.

For Manchester this was formally established in April 2011. The Manchester Independent Economic Review <http://www.manchester-review.org.uk/> was one of the first steps in this process. This study identified the strengths and challenges which have been translated into the Greater Manchester Strategy. The Greater Manchester Local Enterprise Partnership will play a role in continuing to shape and deliver this strategy.

Other cities failed to make comparable progress. A recent report reviewing Liverpool's experience<sup>13</sup> states that 'we are clear that a lack of co-ordination, co-operation and leadership within the wider Liverpool region has held back growth and led to diminished living standards and job prospects. Indeed, now the formal Government regions have been dismantled it is imperative that neighbouring areas voluntarily cohere and co-operate, and that the City of Liverpool settles into a new role not just as a regional centre but as a regional leader.'

In Wales, a Welsh city regions task force was announced by the Business Minister in November 2011. The purpose of the task force is to evaluate the role of city regions in economic development with findings to inform the future approach to economic development planning.

In Scotland, coupled with a commitment to a Cities Agenda, the Scottish Government has appointed a Cabinet Secretary for Cities Strategy. A further example of their commitment to cross boundary working is provided by the Strategic Development Planning Authority for Dundee, Perth, Angus and North Fife. Established under the Planning etc. (Scotland) Act 2006, a **Strategic Development Plan**, which will replace existing council structure plans, will set out a framework for growth in the Dundee city region. The plan was **developed with a** joint committee is made up of three councillors from the four constituent local authorities.

Draft (Jan 2012)

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<sup>13</sup> 'Rebalancing Britain: Policy or Slogan? Liverpool City Region - Building on its Strengths: An independent report' (October 2011)

### Draft Policy Approach

The development of an **urban policy for the Belfast City Region** would realise significant economic, social and environmental benefits. Belfast City Council, in partnership with adjacent Councils and relevant Departments, will consider the potential for new administrative and governance structures that better reflect Belfast's physical, social, economic, cultural or environmental reality.

Framing and implementing a policy for the City Region will be advanced through political and officer level working groups, within which Belfast City Council will seek to

- Develop the evidence-base leading to the preparation of a credible economic strategy for the city region
- Promote the concept and benefits of a city-regional approach,
- Strengthen relationships between different tiers of government,
- Sponsor inter-city regional collaboration
- Identify priorities across the City Region area
- Pursue the development of City Regional Development Plans,
- Explore the possibility of a City Regions Forum (Belfast, Londonderry / Derry / Newry) bringing together senior officials from each of the city regions and Departments in order to provide a basis for joint working and policy development
- Consider pooling of individual local authority powers and resources to achieve greater gains for the wider area
- Ensure that any subsequent administrative and governance structures have a clear development remit with sufficient resources and powers including planning and land assembly

## 4.2 Centre City

A well established evidence base supports the hypothesis that dynamic cities are a pre-requisite for regional growth. Cities and their functional area are the building blocks of the economy and encompass the benefits of the urban offer, including economies of scale, proximity, access to services and higher employment densities which improve productivity and create opportunities for innovation.

### 4.2.1 Policy priorities

#### Protect and enhance the role of the City Centre

The centre city objective focuses on enhancing the city as a shared civic, commercial, retail and cultural hub and centre of the city region by

- ensuring an adequate supply of commercial (Grade A office space), living and retail space within the City Centre
- supporting the delivery of Royal Exchange
- addressing deficiencies in infrastructure and environmental challenges for city living
- promoting the use of derelict land and underused buildings
- protecting and enhancing the city's distinctive historic fabric
- avoiding or mitigating the adverse impact of developments at the edge of or outside the city centre such as Titanic Quarter
- prioritising environmental & design quality, developing partnerships which focuses environmental quality within the public realm,
- prioritising investment in sustainable travel, reducing and mitigating the environmental effects of facilitating access for the people who work in or visit Belfast but live outside the area.

#### Produce and implement a Framework Plan for the City Centre

The DSD City Centre Regeneration Strategy, highlighted in the review chapter, reflects the importance of a quality public realm in encouraging investment. However in anticipating the requirements of key development areas and the need to improve City Centre cohesiveness, additional analysis should be undertaken as a priority to include land use, transport considerations, pedestrian counts and movement analysis.

More emphasis on place is also required for the areas described as 'Shatter zones' within the 2004 masterplan. These areas continue to be 'characterised by poor urban form, dereliction, unusable spaces and peace-lines'. They are particularly problematic in terms of design because of limitations with respect to existing reference points such as built form, frontage and heritage that would in other circumstances help to set a better context within which quality design could be achieved.

Further consideration of the city centre functional and aesthetic attributes should fully evaluate the following well established principles of good urban design.

- Character - a place with its own identity
- Continuity and enclosure - where public and private spaces are clearly distinguished
- Quality of the public realm - a place with attractive and well-used outdoor areas
- Ease of movement - a place that is easy to get to and move through
- Legibility - a place that is easy to navigate
- Adaptability - a place that can accommodate and adapt to change easily
- Diversity - a place with variety, choice and interest

Good design should also address contextually specific issues, established through area based analysis. In Belfast, these issues might include;

- Pursuing the total place agenda, rather than project led, site specific design solutions that undermine functionality and cohesiveness
- Avoiding the creation of large blocks in city centre locations
- Ensuring that an area based approach is sought for shatter zones rather than design solutions for single sites.
- Identify character areas based on functional attributes of each part of the city and develop mixed use areas with predominant functions based on this approach
- Informing the location of BRT routes and halts
- Encouraging investment potential in derelict buildings and opportunity sites, particularly where there are opportunities to protect and enhance the historic environment.
- Protect and enhance the provision and accessibility for cycling and walking
- Focus on the strategically important connections e.g. City Centre with Universities, Hospitals and Titanic Quarter.
- Overcoming the edges and barriers created by existing and proposed vehicular routes; review or challenge the need for further provision in the context of established place making practice
- Reflect an up-to-date evidence base in relation to pedestrian counts and vacancy rates
- City centre living; the need to address liveability issues including access to open space and convenience shopping
- Address health inequalities and issues undermining wellbeing such as poor air quality.
- For the purposes of tourism development, address connectivity / linkages between tourism destinations

The implementation of such as strategy will require collaborative working between all organisations, particularly the DSD, who influence the quality of the built environment and public realm. It may also require the procurement of house urban design expertise that will provide ongoing design input on projects in the context of this strategy.

### Support City Centre Living

Further efforts in relation to city centre living are necessary to assist in developing communities and encouraging a supply of refurbished residential floor-space within the city. In the first instance it is necessary to identify locations in the city where this is most likely to be successful. These locations should be identified by developing an understanding of

- Existing and pipeline residential developments
- Potential housing sites (including as part of mixed use)
- Support services and amenity levels
- Mixed tenure development and purpose built or specialised accommodation such as that for students

As part of this assessment, further consideration should be given to criteria based policies that identifying suitable sites for future student accommodation, with a viewing to ensuring that an appropriate mix of owner occupancy and transient residents is maintained within these areas.

The consideration of city centre living could form part of an overall development framework prepared for the city centre and may result in area-specific guidance to assist in delivering residential development in targeted areas.

Coupled with appropriate residential development control and traffic management policies as well as enforcement and coordination across functions, this could measurably improve matters such as residential amenity, environmental and design issues citywide.

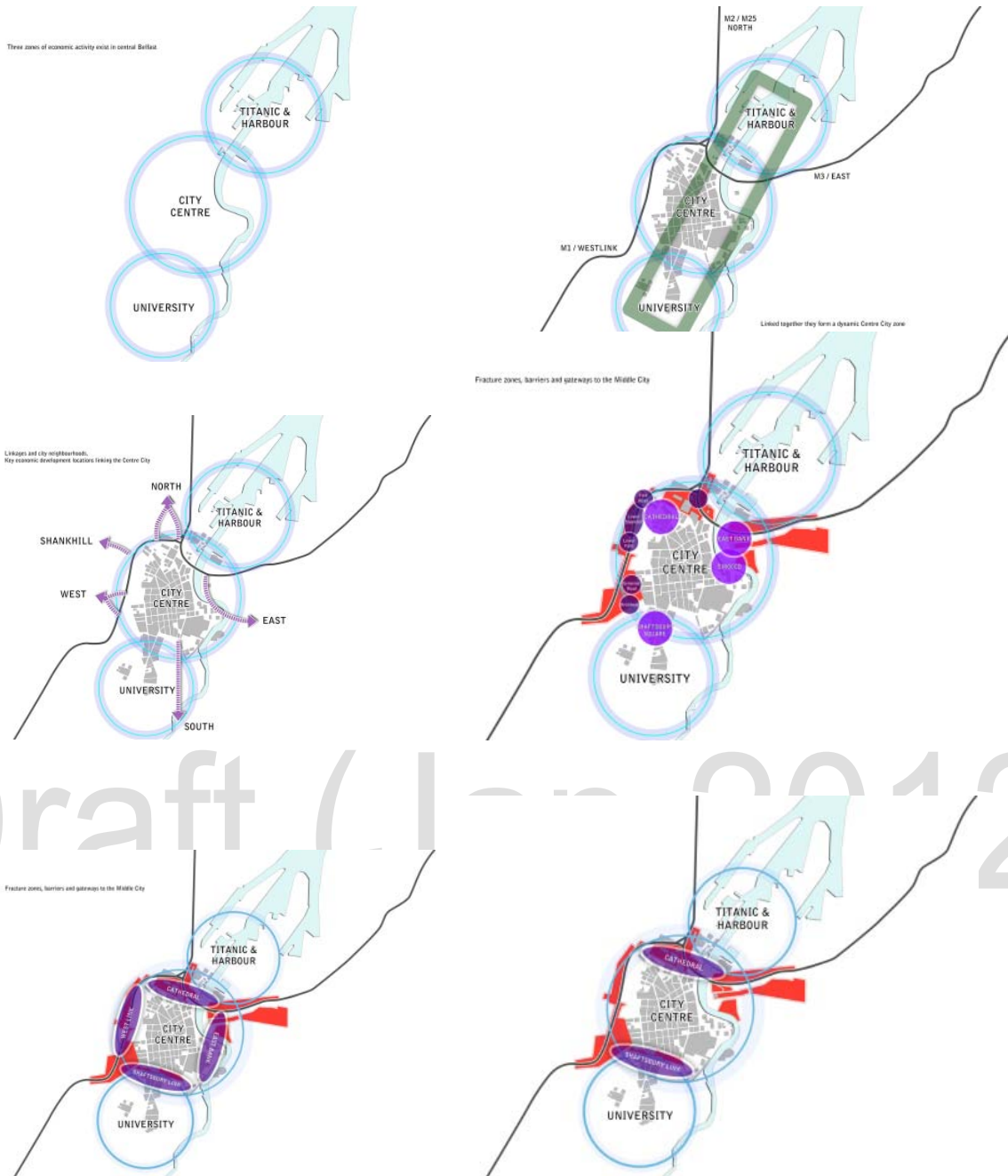
#### Address Deficiencies in Green Space within the City Centre

To date, improvements within the city centre have focused on public realm and mainly hard landscaping. Whilst high quality has been achieved there is a requirement to soften and enhance the environment further through a range of city greening measures and the provision of additional green space. As shown in **Figure 10**, measures should be taken to address identified deficiencies as part of major development proposals. These spaces should be high quality, overlooked and strategically placed, close to greenways and proposed walking and cycling routes.

#### **Centre City Spatial Priorities**

The centre city is defined as the central corridor that links the University area through the city centre to the edges of the harbour estate and the Titanic Quarter. This is crucible of the regional economy and the most important economic space in the north of the island. The masterplan strategy for the centre city moves away from the previous strategy of multiple project driven interventions to a wider strategy based around functionality and cohesion. Given the pace and quantum of development of recent years the emphasis now shifts to making the centre city work and function better as a sustainable mixed use location capable of supporting continued investment and a broad based working and residential community fully linked and integrated with the city's neighbourhoods.

The masterplan prioritises two areas of the centre city where the City council, in coalition with government and others, will lead the development of urban design frameworks that will address the function, cohesion and integration of these areas within the city. This work will aim to secure deliverable investment strategies for these areas within the lifetime of the masterplan. These areas are the Cathedral area to the north which will host the integration of the new University of Ulster campus and the Shaftsbury Link area to the south which will address the blight of the current reserved road corridor stretching from Hope Street to Cromac Street. An illustrative approach for each area, set out in Section 4.2.2 and 4.2.3, shows the value of a bespoke urban design process which will be commissioned at a later stage.



**Figure 8 Key Development Areas within the City Centre**



## 4.2.2 Cathedral

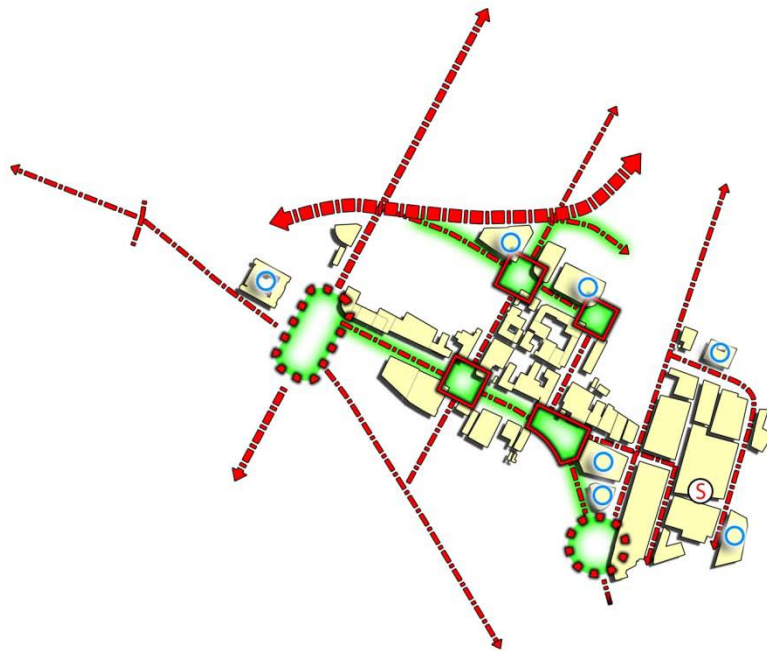
### Deliver a Placemaking Solution for the integration of the University of Ulster at Cathedral Quarter

There is a critical opportunity to intervene and help coordinate the development of land assets in the vicinity of the Cathedral Quarter. It's a once in a century event that a city gets to plan for a new university campus and care needs to be taken to shape this substantial investment of public money to ensure that it delivers the optimal social, economic and physical impacts on the city centre.

The University Campus project is just one of a number of projects that need alignment in this part of the City.

- The DRD's proposals for a major upgrade of the motorway interchange at York Street.
- The integration of proposals at City Quays and Clarendon Dock
- The development of the North Belfast Cultural Corridor linking to Girdwood
- The critical link to the city centre through Royal Exchange
- The re-design of Dunbar Link
- The integration of new student housing
- Gamble Street Station

All of the above require to be considered within a holistic place making framework for the Cathedral Area. The City Council needs to lead a coalition of statutory agencies to ensure that the collective impacts of these disparate projects are fully understood and properly planned to deliver long standing positive and sustainable transformational change for the city.





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Key elements of the proposed intervention are:

- A** Transformation of Dumbar Link into a urban avenue
- B** Transformation of Great Patrick Street & Frederick Street into urban avenues
- C** Provision of landmark buildings at key locations
- D** Gamble Street Station & Public Square
- E** Formalising an urban entrance into the City Centre
- F** Rebuilding the historic urban fabric with a mix of uses in a perimeter block form
- G** Use of space under fly-over to provide multi-purpose space for culture and sports
- H** New pedestrian bridge
- I** New public open space at Donegal Quay
- J** Provision of new facade at Great Patrick Street and Frederick Street
- K** Yorkgate Interchange

### 4.2.3 Shaftsbury

Deliver a Placemaking Solution for the Shaftsbury Link

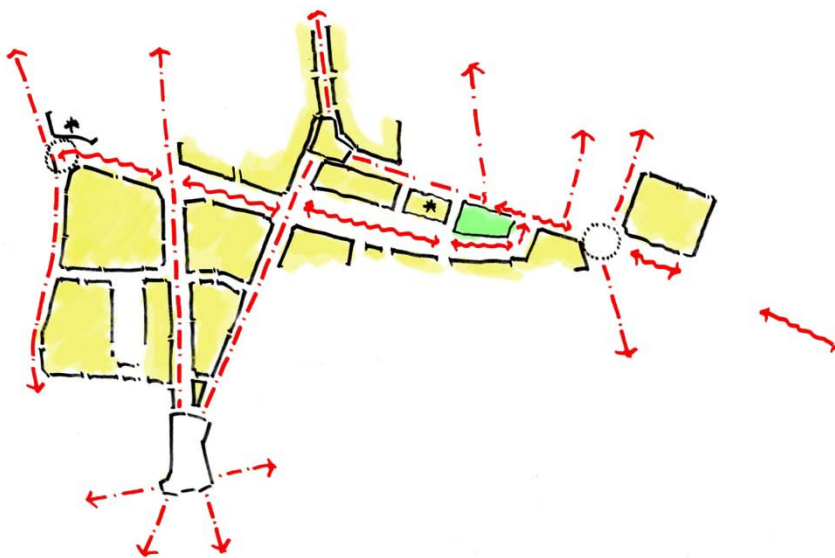
The south side of the city centre has been blighted for decades by the reservation of a road corridor that stretched from the Boyne Bridge at Sandy Row to the Ormeau Road and Cromac Street. Formerly known as the Bankmore Link this controversial road project has never been satisfactorily resolved in terms of its severance impacts, something the city has suffered extensively from in other places. This issue needs to be resolved if this part of the city centre to rebuild its linkages.

The area affected stretches as far as Shaftsbury Square to the south and is the pivotal link with the University and Botanic areas of the city. It affects the residential neighbourhoods of Sandy Row, Donegal Pass, Cromac Street and the Markets and involves the regeneration of Great Victoria Street, Dublin Road, Ormeau Road, Hope Street and Ormeau Avenue. A design solution is needed that deals with community impacts, the reconstruction of the city streets and traffic circulation issues that have direct implications for the wider city centre.

The key components of this project are:

- The design of a new avenue that prioritises north/south pedestrian movements primarily to and from the city centre and the Europa transport interchange
- New mixed use frontage developments that will frame the avenue and fill the gaps in the existing network of streets
- A new public park on Ormeau Avenue
- The opening of new links with established residential neighbourhoods
- The potential for a pedestrian bridge from the Gasworks to Ormeau Park in order to link the residential neighbourhoods to Ormeau Park

In planning and urban design terms, this project will provide a cohesive strategy for the rebuilding of this part of the city improving the pedestrian environment, enhancing the setting of the conservation area and a number of listed buildings.





The Key elements of the proposed intervention are:

**A** Great Victoria Street Station

**B** Key Landmark Building

**C** Completion of perimeter block

**D** Transformation of Shaftsbury Link into an urban avenue

**E** Potential transformation of excess surface car park into urban allotments

**F** Enhancement, redevelopment and tree planting of Great Victoria Street

**G** Enhancement of Dublin Road

**H** Redevelopment of Shaftsbury Square

**I** Potential redevelopment of key corner building

**J** Provision of a new public square - Ormeau Square

**K** New building block at Ormeau Road corner

**L** Rebuilding the urban fabric with a mix of uses in a perimeter block form

**M** Completion of perimeter block

**N** Urban Park

**O** Pedestrian bridge

### 4.3 Neighbourhood City

Providing a healthy living environment for the city's residents will help to create thriving neighbourhoods and attract more people to live in Belfast. At the city level, neighbourhoods are important part of successful cities in that they should provide a mix of housing types catering for all levels of demand and identified housing need.

The 2004 Masterplan analysed the complexities of the neighbourhood, around five sectors, inventively entitled North, South, East, West and Shankill sectors. These were based on the five Area Based Partnerships and have since been adopted by DSD as the template for their five '**Strategic Regeneration Frameworks**' (SRF's) which are now in place. The SRF's have provided a valuable area based agenda for the neighbourhoods but they have not been fully integrated to provide a genuine citywide perspective on strategic regeneration priorities.

Issues of equality, skills, access to employment, barriers and interfaces will be important to neighbourhoods in the future. However, because of economic conditions, addressing wellbeing and quality of life issues relating to deprivation is likely to need a refreshed and alternative approach, distinct from physical development projects, but led by skills and learning, environmental quality and considering potential to reduce living costs through energy efficient refurbishment programmes.

#### 4.3.1 Policy Priorities

##### Improving Quality of Life & Wellbeing

Developing the neighbourhood city and delivering improvements to quality of life and wellbeing, will focus on

- Enhancing and regenerating a network of functional and sustainable neighbourhood centres
- Examining the role of density and green infrastructure in supporting vitality within different areas of the city
- Identifying design criteria that could improve public space for social cohesion; testing the possibilities of collaborative design processes
- Integrating the work carried out for the Strategic Regeneration Frameworks
- Increasing access to opportunity and improve linkages to the city centre and across the city and addressing divisions
- Maximising the regeneration impact of public sectors projects and programmes, and
- Improving ownership and capacity to deliver and sustain change at the local level
- Investigating the use of employment clauses

Neighbourhoods should also provide the focus for community; social and environmental sustainability, and in doing so should provide access to;

- Open space for shared play and recreation;
- Fresh food / day to day convenience shopping needs;
- Increased connectivity to support access to services and social infrastructure
- Options for sustainable and active transport; and
- Public transport options that enable access to job opportunities, education and skills development.

### Neighbourhood Design

Neighbourhood design and layout can influence the way in which people travel, access services, including open space, and ultimately the quality and attractiveness of a neighbourhood.

In Belfast, neighbourhoods have been heavily influenced by developments that have resulted in reinforcing segregation between communities. New housing resulting in poor layout and low levels of permeability in turn reinforce segregation and community divisions rather than creating good quality and healthy environments where people want to live.

Improving Neighbourhood design, as part of the Strategic Regeneration Frameworks, is vital for delivering sustainable and shared regeneration solutions and attracting people from elsewhere to live in Belfast. Without it, the City will continue the struggle to rebuild its population.

The City Council will seek high quality design for all new development, with design measures that are;

- Based on a comprehensive understanding of the existing physical, social and environmental context;
- Permeable, where this improves access to community facilities, services and jobs and results in improved neighbourhood design by reducing physical barriers and segregation and increasing access to shared spaces;
- Legible, so that neighbourhoods are easily understood and their form and layout create vibrant and active communities;
- Adaptable and can meet the changing needs of a community
- Demonstrate character and diversity by mixing use and housing types.

### Improve Access to Job Opportunities

The geography of employment is changing, with higher skilled jobs increasingly concentrated within city centres and an incremental shift of lower skilled jobs to out of centre locations. The dispersal of lower skilled employment is an identified trend that is likely to continue in UK cities and has led to increasing levels of spatial mismatch between skills, particularly at lower levels, and job opportunities<sup>14</sup>.

Deprived areas, similar to many of Belfast's neighbourhoods, contain a disproportionate number of people without access to a car<sup>15</sup>. Coupled with physical barriers that segregate communities, this creates a context where many are less willing to travel outside of a narrow geographic area. Therefore any spatial mismatch between where people live and where job opportunities are located is likely to reinforce high levels of unemployment, particularly at the lower end of the labour market.

However, transport is only one of the factors, which include skills, childcare, employer recruitment practices and demand for labour, that influence individuals' access to work. Transport should be seen as part of any policy mix aimed at improving access to jobs, which is important to Belfast's residents.

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<sup>14</sup> Access all areas: Linking people to jobs Naomi Clayton, Rachel Smith & Lena Tochtermann September 2011

<sup>15</sup> Over two-thirds of Jobseekers Allowance claimants have no access to their own car or cannot drive.

Primarily a concern of the city's resident population, improving access to job opportunities, is concerned with connectivity from within the city to centres of employment and can be addressed by

- Restricting major employment development to those areas that are accessible by public transport;
- better coordination across planning and transport policies to ensure future employment sites are accessible;
- creating better integration of existing transport services;
- plugging any potential gaps that may exist in public transport provision; and
- Providing support to communities to help them access jobs further afield.

#### Improve skills in relation to the current and future job market

Oxford Economics' skills forecasting research illustrates how the economy is becoming increasingly 'skills hungry'. The location therefore of NI's major universities and campuses and largest FE college in or just outside the city, as well as some of the region's best secondary schools, provides Belfast with the critical mass and skills infrastructure to attract investors and meet the skill needs for future economic growth. Nevertheless, Belfast also needs to

- Retain all of its skills – as it still has a 'brain drain' of school leavers and out-migration of graduates
- Attract large numbers of highly skilled migrants (Belfast does not enjoy a strong track record with this).
- Address skill shortages in niche sectors or new emerging sectors
- Improve skills of the resident population, who will suffer disproportionately in terms of job losses.

For Belfast's resident population, a focus on lifelong learning should recognise the need for equitable access to opportunity and skills development for the city's residents, considering

- Improvements to learning & skills development, particularly where this takes advantage of future job opportunities,
- Diplomas designed in partnership with employers and universities,
- Learning landscapes; using assets of city as part of teaching modules,
- Mitigate the impacts of slow recovery within the city's most disadvantaged communities, and
- Prevent further dispersal of lower skilled employment from the most accessible locations e.g. City centre

#### Prioritise Neighbourhood projects that maximise regeneration benefits

There are a considerable range of projects mooted for neighbourhoods across the city which are at varying stages of implementation. Given current and future resources, the Council has refined this list and prioritised projects on the basis of meeting an identified need and maximising the beneficial impact (See **Figure 9**). Whilst this prioritisation will not preclude other projects from going forward, the priority list will be the focus for implementation in relation to Council resources.

A further study detailing a rationale for project prioritisation will be initiated on adoption of the Masterplan review. This would be based on their capacity for delivery and optimal regeneration outcomes and therefore projects should ideally demonstrate benefits beyond the immediate local area including benefits to accessibility, connectivity, learning or the environment.

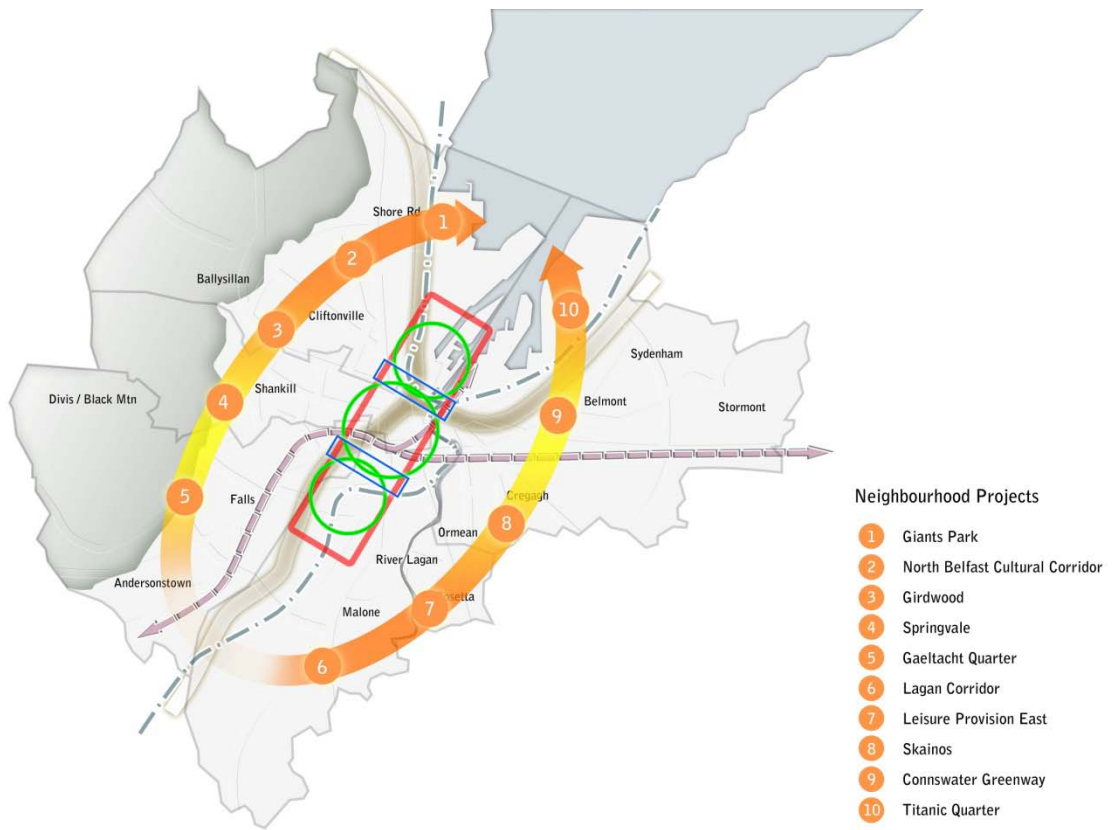


Figure 9 Neighbourhood Projects



## 5 STRATEGIC OBJECTIVES

### 5.1 Learning City

Universities are important assets which have a considerable impact on the city and regional economy and contribute towards the city's vibrancy. They do this by

- Increasing educational attainment and the supply of skills and knowledge workers;
- Direct employment of teaching, research and support staff;
- Structured support of start-ups;
- Increase GVA associated with student spend; and
- Service contracts with locally based businesses.

Belfast has a total of five higher education institutions, located on 10 sites across the city, accommodating approximately 59,000 students. Based on the 2008 population estimate, students make up 22% of the population.

Depending on student numbers, undergraduate spend can account for up to 10% of the total economic activity of some cities; their housing and travel arrangements therefore have considerable impacts on the city and there are related benefits from involving universities in city development strategies. In particular, a university located in a declining area of a city has a major opportunity for economic impact.

The economic impact of universities is widely acknowledged by work completed in the UK by the Centre for Cities and in the USA by the Initiative for a Competitive Inner City. This opportunity was explored in detail and advocated in the Joint Study by the Initiative for a Competitive Inner City and CEO's for Cities 2002, entitled Leveraging Colleges and Universities for Urban Economic Revitalization: An Action Agenda.

This study concluded that unleashing the local economic development capacity of these institutions should be a national priority, highlighting the following strategic areas in which university resources can be leveraged for economic growth in declining areas of a city. These include:

- purchasing of goods and services
- employment
- property development
- creating business incubators
- advising business and building networks
- workforce development.

#### 5.1.1 Policy Priorities

##### Harness the potential and managing the impact of Belfast's third level educational institutions

Belfast City Council has identified considerable strength in universities and local authorities working together to enhance the university's role as a large employer and contributor through research towards innovation and wealth creation. Collaboration is also important for maintaining and improving interaction with the adjacent urban environment and standards in relation to brand and reputation which in turn attract high quality staff and students.

The Masterplan review details a better understanding of the role of institutions within the city and guides spatial implications of future university estate development to achieve maximum benefits.

Harness the potential and managing the impact of Belfast's third level learning institutions by

- Shaping the potential of University of Ulster campus expansion in relation opportunities in the wider area; whereby the area is greater than the sum of its parts.
- Encouraging the preparation of institutional masterplans
- Growing a dynamic private sector and explore the advantages of the city's long history of manufacturing
- Improving education and skills locally
- Maximising the benefits and mitigating the impacts of students as consumers and citizens
- Understanding and managing student living and travel patterns
- Protecting communities through better integration and management
- Maximising regeneration benefits of educational sector developments.

#### Enhancing skills and innovation in key sectors

A partnership between universities and economic development organisations should be developed to expand on innovation in key sectors and exploring the role of education in addressing some of the most pertinent of the city's competitiveness issues including an over reliance on public services, low levels of entrepreneurship, high levels of labour market inactivity and an increasingly skills hungry economy.

It is anticipated that the service sector will provide the majority of additional jobs however the draft NI Economic Strategy also highlights potential for growth, both in manufacturing as well as services, with growth in specific sectors including;

- Life & Health Sciences
- Advanced Materials
- Advanced Engineering
- Sustainable energy / green economy.

#### Drive forward recommendations from the study into the issues in the Holylands & wider university area

The issues of over intensification in relation to HMOs and shared accommodation are acutely prevalent in the Holylands and surrounding area. There is clearly a need to manage student housing at the strategic scale and manage incremental change to the urban environment more effectively and learn from the experiences to inform approaches in other parts of the city. The draft recommendations resulting from a recent study identifies requirements to

- Identify suitable locations and innovative arrangements for housing students in the city
- Develop an integrated strategy for shared housing in Belfast including the housing needs of students and to take account of social need
- Prepare a Planning Policy Statement, Development Advice Note or similar tool on the DoE's policies and approach to the provision of student housing
- Develop a housing renewal strategy for the Holyland area
- Provide a Planning Policy information leaflet for developers in respect of HMOs and conversions
- Identify suitable locations and innovative arrangements for housing students in the city including purpose built student accommodation
- develop a fit for purpose mechanism / forum to co-ordinate the provision and management of student accommodation in the city

### Work with key stakeholders to review, improve the design of the UU campus building and its impact on the Cathedral Quarter

It is anticipated that approximately 15,000 students and staff will relocate to York Street by 2017. The proposed move will have a catalytic effect for City Centre Cathedral quarter bringing vitality to the northern part of the city. However measures must be taken to integrate the proposed design with requirements of the wider area, reflecting adjacent proposals and the need to protect the character of the emerging cultural quarter. It will also encourage uses that cater to the student market, and implications for adjacent areas must be managed.

Striking the right balance between accommodating and facilitating students and managing unintended negative consequences must be considered at the design stage rather than costly and ineffectual retrospective actions, as evidenced by the Holylands experience.

For example, negative consequences of this move are likely to be significant in relation to traffic because of a high car ownership in the student population. There is an immediate need to better understand how the additional access requirements could be managed and support more sustainable forms of travel.

A number of consequences could arise if the student generated traffic is left unmanaged. Peak hour traffic at critical junctions and links will be exacerbated and longer delays will ensue. Uncontrolled parking on-street and on open areas may ensue resulting in an unsightly environment and a potentially more dangerous streetscape for pedestrians.

It is therefore imperative that consideration is given to managing this additional demand for travel to the city and we suggest that the likely solution will be formed from a mix of interventions both passive and active, making use of sustainable transport options. Examples of successful (Sustrans) schemes can be found in Nottingham and Leeds, where cycling has increased by 38 per cent and by as much as 66 per cent in the cities' universities and teaching hospitals.

## 5.2 Accessible and Connected City

The accessible and connected city strategic objective acknowledges the importance of transport and movement for Belfast at international, regional and local levels.

At the international and regional scale, airports and ports are important economic assets and drivers of job creation and economic growth for the city and its wider city region. Their activities should be balanced against local environmental and social impacts.

More locally, accessibility within the city should help to realise improvements to quality of life for the city's residents and to the city's urban fabric. As part of the Programme for Government, the Northern Ireland Executive plans to invest in and promote more sustainable modes of travel and create the conditions to facilitate at least 36% of primary school pupils and 22% of secondary school pupils to walk or cycle to school as their main mode of transport by 2015.

Road transport is also now the single largest source of greenhouse gas emissions, accounting for 32% of all CO<sub>2</sub> emissions in NI and largely accounts for the breach in air quality standards at M1 Motorway / A12 Westlink corridor, from Cromac Street towards Short Strand and at the Albertbridge Road.

The growth in emissions from this sector can be attributed to economic prosperity, increasing population and employment, reliance on private cars, long distance commuting, and greater freight transportation. There is a need to focus on improvements that decouple negative global and local impacts from economic growth in order for the transport sector to move toward a more sustainable path.

High rates in emissions from the transport sector highlight the need for a broad mix of policies and measures, which will achieve a modal shift to public transport, walking and cycling, as well as increased fuel efficiency in both personal and freight transport. In the first instance, priorities should focus on tackling specific issues for Belfast. These issues, associated causes and potential solutions are summarized in **Table 6**.

**Table 6 Belfast Transport: Problem, Causes and Solutions**

Problem	Contributing Causes	Potential Solutions
High commuter traffic	Car parking supply Journey times competitive with other modes of transport	Parking control/ Integrated pricing regime Reduction in car park supply Competitive public transport (quality, price, journey time)
Congested road arteries	Junction capacity	Not the underlying problem – junctions acting as throttle
Static public transport patronage	Car more attractive Journey times uncompetitive Through routes unavailable	Quality bus corridors Enforcement of bus priority 'Through' services
Low levels of walking and cycling	Lack of facilities, network, incentives	Cycle parking facilities Comprehensive, joined up cycle routes Information and facilitation Travel plans

## 5.2.1 Policy Priorities

### Implement Belfast City Council Transport Policy

Since the 2004 Masterplan, BCC has developed its own transport policy which provides Belfast City Council's vision for a sustainable transport system and aims to build upon what has been achieved since the previous version of the policy was published in 2001.

***'An improved transport system for Belfast, based on sustainable principles, is a key priority for us and forms the basis for a number of our corporate plan strategic themes, in particular better care for Belfast's environment – a clean, green city now and for the future.'***

The transport policy provides a comprehensive framework of seven Strategic Objectives detailed in **Appendix 2**. In order to further delivery, a supplementary implementation plan should be progressed to develop a suite of definable and desired outcomes. These outcomes should be 'SMART' i.e. Specific, Measurable, Achievable, Relevant and Timed. Further benefits could be obtained by pursuing measured commitments on specified issues such as;

- Air Quality
- Demand management
- Parking supply
- Road space management
- Travel Choice behaviour change initiatives

Consideration also needs to be given to softer measures aimed at travel choice and behaviour change. Where these are in place more resources could be given to achieve targeted outcomes. In particular specific resources should be advocated for:

- Cycling officer within the City Council
- Travel planning and initiatives with business and the public sector employers
- School travel planning
- Cycle networks and facilities

Issues and lack of progress in some cases can also be traced to a lack of integrated planning at a city regional level and fragmentation of responsibility. There is a need to place responsibility and the means of delivery in the one place.

### Belfast Rapid Transit

The Belfast Rapid Transit scheme owes its rationale to the early work done for the 2004 Masterplan. The conditions that justified the scheme at this stage are unlikely to have changed since development of the business case and, if anything, with a change of focus to take account of climate change the case today will be stronger.

Proposals to develop a pilot rapid transit system in Titanic Quarter, east and west Belfast linking to city centre are welcomed as the first step towards the introduction of rapid transit in Belfast. However, there is a need to ensure the following considerations and broad objectives are also achieved;

- Rapid transit as a driver for regeneration throughout Belfast, providing high quality access to and linkages between jobs, hospitals, schools and colleges in different parts of the city and where possible supporting the regeneration of areas along the proposed alignments

- Integration with land use planning along the route alignment; essential to allow higher density development and identification of regeneration opportunities.
- Integrated journey planning through integrated ticketing system across different public transport operators
- The development of strategic park and ride sites positioned to compliment the scheme and boost ridership
- Seek pilot route proposals for north and south Belfast so that opportunities are taken to improve access to North Belfast; which contains some of the most socially deprived areas in the city and large trip generators such as the Mater Hospital, new University of Ulster campus on York Street and the development of the Girdwood, and to the South of the City where large volumes of commuters use the southern approach.
- Ensure that proposed route with Titanic Quarter is carefully designed to establish the desired journey times
- Extend the CITI route to serve the George Best City Airport.

### Gamble Street Rail Station

It is understood that a new station, located at Gamble Street, is proposed and that this is intended to serve the city centre, with the potential to meet the student demand generated from the Ulster University campus move, and the potential to open up access to the Titanic Quarter.

Since it is unlikely that the NI rail network will open up to a metro style on-street service we are of the view that care needs to be taken when seeking to reconfigure the rail service. In Scotland and England rail franchising is refashioning rail services in such a way as to differentiate between metro services and intercity services. The main line rail network is ideally suited to long distance travel; only in special circumstances, where the local network is extensive and where there are high volumes e.g. Liverpool, Manchester, Glasgow, London does the rail system perform a metro style service. Services are generally configured to offer long distance travel.

We advocate detailed investigation into the potential for the NI Rail service to provide a local service serving the Belfast Travel to work area.

In the case of the potential for a rail station to serve the Titanic Quarter consideration will need to be given to a bus interchange because walk distances to many parts of the Titanic Quarter would mitigate against walking.

### City Airport Runway Extension

Airports are key economic generators; not only are they direct employers but they also support associated employment beyond that of the airport. They are also a gateway for business, tourism and industry. The City airport handled about 2.7 million passengers in 2010 and this represented more than twice the passengers than it did a decade ago.

An application to extend the Belfast City Airport runway by 590 metres remains under consideration. Belfast City Airport claim that the extension will allow greater load carrying capacity and this will allow greater efficiency for the carriers and in turn the destination pool will be increased because of the improved fuel capacity. Thus passenger throughput will be increased through the terminal. The owners of the airport are at pains to say that while an additional 9000 flights per annum will be attracted, the existing limit of 48,000 flights will remain unaltered. City Airport also say that the current hours of operation will remain unchanged.

Given the competing issues and with a focus on transport we can see a net benefit arising from the runway extension, provided that environmental issues are satisfied and complimentary improvements addressing the existing and future transport issues are made. These are concentrated on, but not exclusive to, the A2/ M3 Cross Harbour approach, connections to the city centre and access to the Titanic Quarter.

#### Review of the Bankmore Link

Plans have been laid to create an inner ring road by upgrading the Bankmore Street / Bruce Street link that would join with Durham Street and then to west bound Grosvenor Road.

In the formation of the 'inner ring' road i.e. Bankmore St/ Bruce St/ Durham St, the proposal should be reviewed to ensure careful thought is given to permeability and pedestrian/ cyclist priority so that it does not result in a transport noose around the city centre (see also **Section 4.2** Centre City).

An example of this effect; ring-road strangulation, albeit on a smaller scale, is the town of Ashford in Kent. Here, with a focus on accommodating road traffic, a ring road some six lanes wide in parts encircled the town centre. A lack of permeability for pedestrians and cyclists resulted with air and noise pollution, safety issues and an environment that was slowly strangling the town.

The creation of road infrastructure 'to keep traffic moving' will not solve all problems and will in many cases have unintended consequences. In practice, this traffic congestion comes at a heavy price, one that many communities are now questioning and turning to other solutions. Careful consideration should be given to the now well understood phenomenon of building new roads and filling them up with derived demand. There is an opportunity to reconsider and avoid a self-fulfilling outcome that may not address or resolve underlying issues and thereby reaching a lasting benefit for the City.

#### Reduce and Control Parking Supply

The existing public transport provision serving Belfast is good but it suffers from a lack of complementary supporting policies and interventions. The position regarding the car parking supply has been reviewed in **Section 2.5.2** and as long as car parking supply remains plentiful and relatively cheap car traffic will remain high and public transport patronage will remain stagnant.

The transportation review indicates that since 2004 there have been an additional 17 off-street or multi-storey car parks opened in the City. This has resulted in a 92% increase in off-street and 29% increase in multi-storey car parking space availability.

The review also concludes that traffic volumes into the city centre are largely driven by car parking supply, in addition to demand management and uncompetitive public transport provision.

Not only is there ample supply of car parking space available but the cost of car parking both off-street and on-street is comparatively cheap by UK city standards. The review also identified only 2 Park and Ride sites at Great Georges Street and Northumberland Street providing a total of 453 spaces. This number of P&R car park spaces is very low and can be contrasted to other UK cities e.g. Edinburgh with 4,043 spaces in six sites.

### 5.3 Eco City

Northern Ireland's draft Economic Strategy, Priorities for sustainable growth and prosperity (DETI 2011) focuses on rebalancing the economy by encouraging business growth and potential of local companies and developing economic infrastructure.

The sustainable energy sector and the emerging low carbon economy are highlighted as market opportunities with a role to play in growing the private sector. This will also enable Northern Ireland to meet challenges relating to climate change, waste management and energy supply; including fuel diversity, cost and security of supply. It is also a Programme for Government target to

- to work towards a reduction in greenhouse gas emissions by at least 35% on 1990 levels by 2025;
- encourage industry to achieve 20% of electricity consumption from renewable electricity and 4% renewable heat by 2015;
- improve thermal efficiency of Housing Executive stock and ensure full double glazing in its properties;

NI has also has low levels of electricity generated from renewable sources, with gas, coal and oil accounting for 90% of power generation. This leaves the region vulnerable to fluctuations in both supply and pricing, and it also presents important environmental considerations. The Strategic Energy Framework confirms the Executive's target of 40% renewable electricity to 2020.

#### 5.3.1 Policy Priorities

##### Improve Quality of Life and economic opportunities linked to sustainable energy /low carbon sectors

Detailing a strategy for sustainable energy and the low carbon economy presents a means by which Belfast City Council can contribute towards addressing future quality of life challenges and benefiting from commercial opportunities. Progress towards clean technology, renewable energy and efficiency will support and drive growth in the economy and reduce costs for businesses and households.

The 'Eco city' objective focuses on economic and environmental advantages of shifting the economic base towards climate change mitigation and adaptation, developing secure and locally available sources of renewable energy and improving on energy efficiency.

It also provides the basis for a structured approach to developing a new internationally competitive business sector for the city in low carbon economy enterprises – renewables, recycling, energy recovery and environmental management. The Council proposed that development at North Foreshore will be an exemplar in this regard.

Technological innovation, business development and job opportunities will help develop this sector and strategy will focus on;

- Furthering structural change to the city's economic model
- Showcasing the low carbon economy sector through exemplar developments at North Foreshore
- Improving links with innovation and learning
- Exploring opportunities for energy efficiency and renewable energy in conjunction with the Green New Deal



### Increase competitiveness through improvements to environmental quality & green infrastructure

This priority focuses the agenda around developing the city's green infrastructure network and improving the provision of green space where deficiencies are identified and joining up spaces through green way connections as identified in dBMAP.

Green infrastructure is a network of high quality green space and other environmental features which can be designed and managed as a multifunctional resource capable of delivering a wide range of environmental, health and quality of life benefits for local communities. It should be provided as an integral part of all new development and alongside other infrastructure such as utilities and transport networks. The Council proposes to

- Address open space deficiency by providing green infrastructure; multifunctional green space linking communities and the environment
- Continue progress towards ecological restoration, urban design and transportation projects e.g. Connswater Greenway

Draft (Jan 2012)

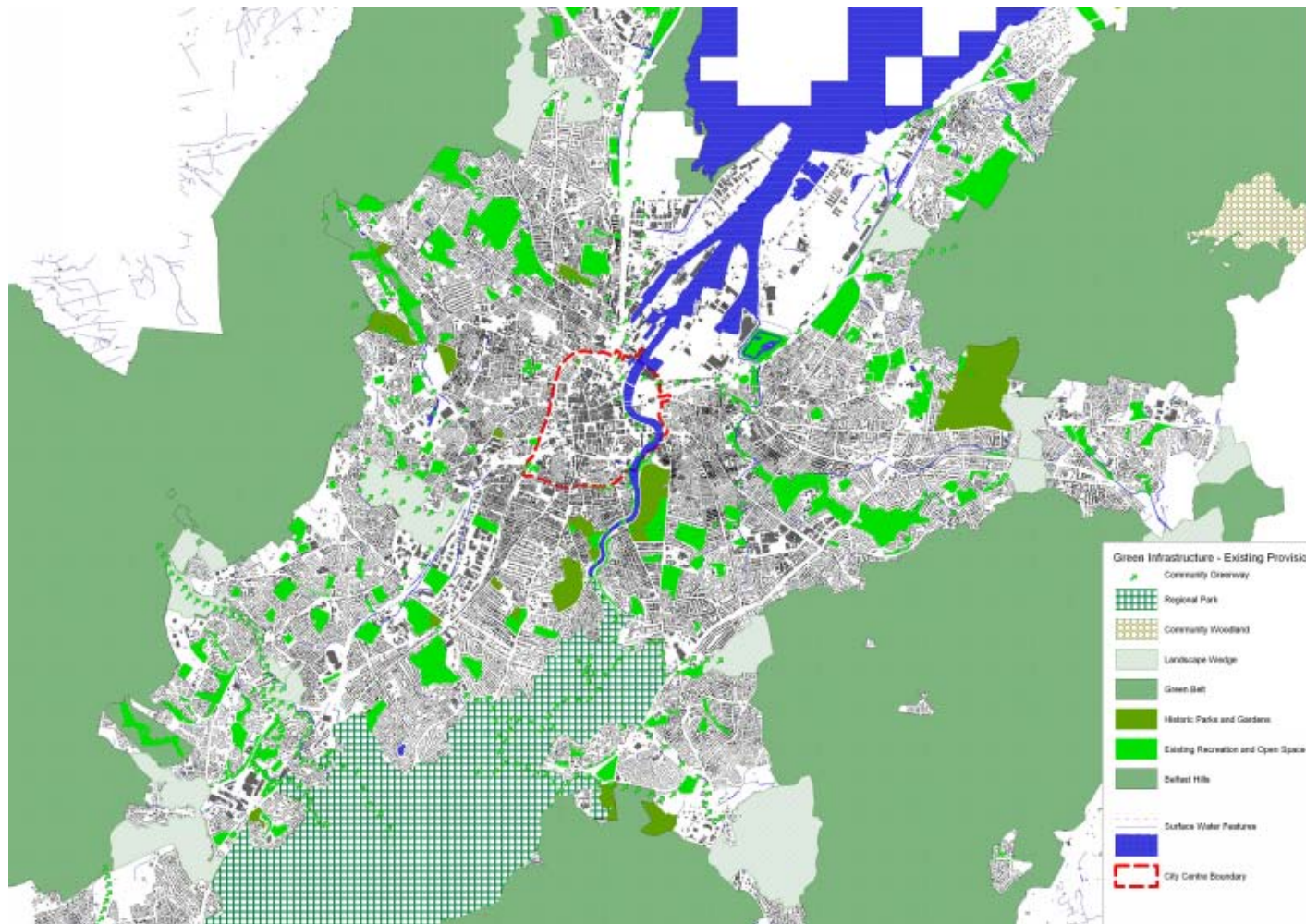


Figure 10 Existing Green Infrastructure

### Implement the Air Quality Action Plan in pursuit of air quality standards

In 2006, the Council published an Air Quality Action Plan for Belfast in collaboration with the Department for Regional Development and its Agencies. To date this Action Plan has delivered improvements in air quality within the Ormeau Road Air Quality Management Area. However in 2010, levels of nitrogen dioxide continue to significantly exceed both national and European health-based air quality standards in the other three Air Quality Management Areas.

- M1 Motorway / A12 Westlink corridor,
- from Cromac Street towards Short Strand
- the Albertbridge Road

Failure to achieve air quality standards for nitrogen dioxide by the revised deadline (an application to extend the deadline until 1 January 2015 is being progressed) could leave Northern Ireland open to infraction proceedings by the European Commission.

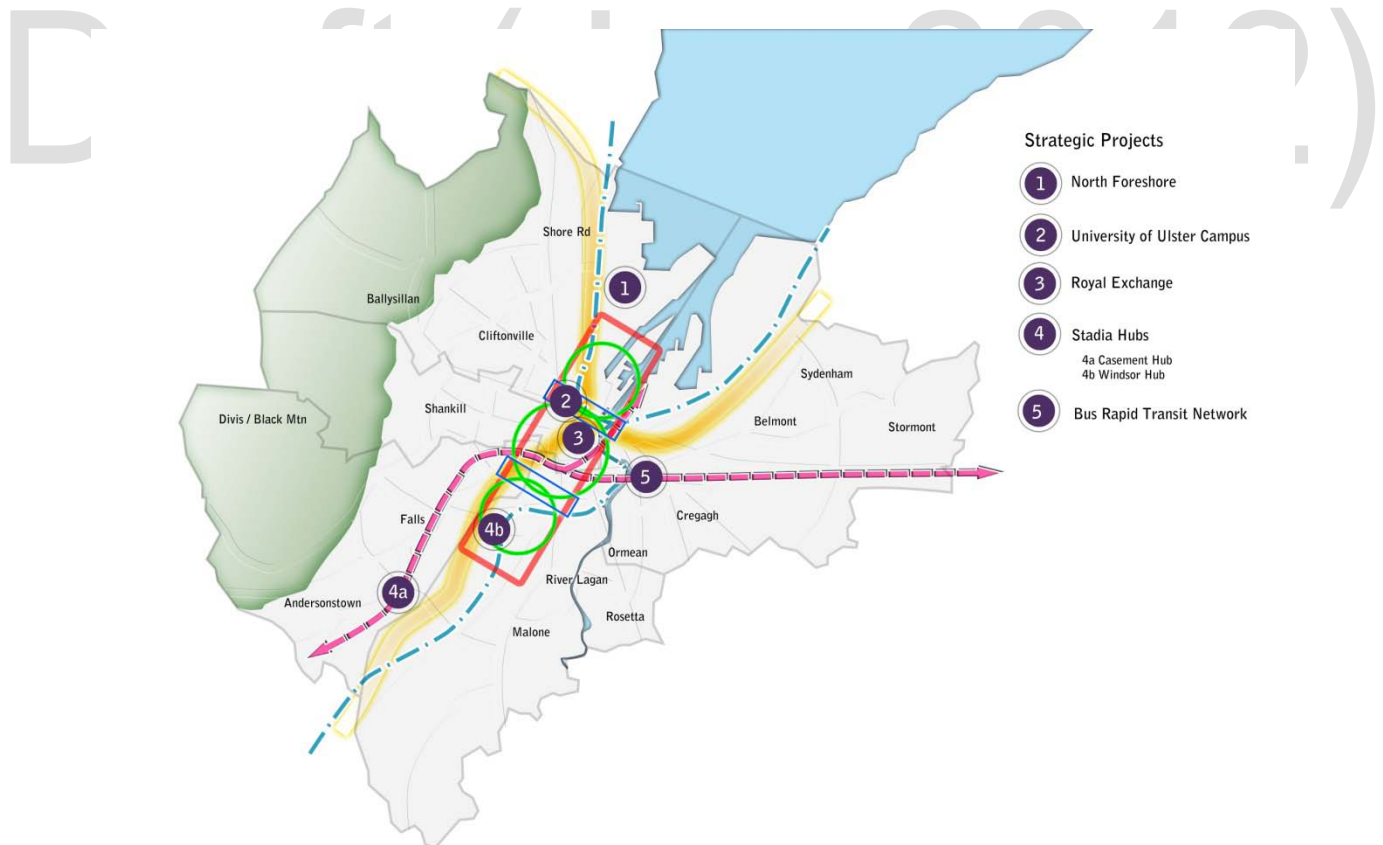
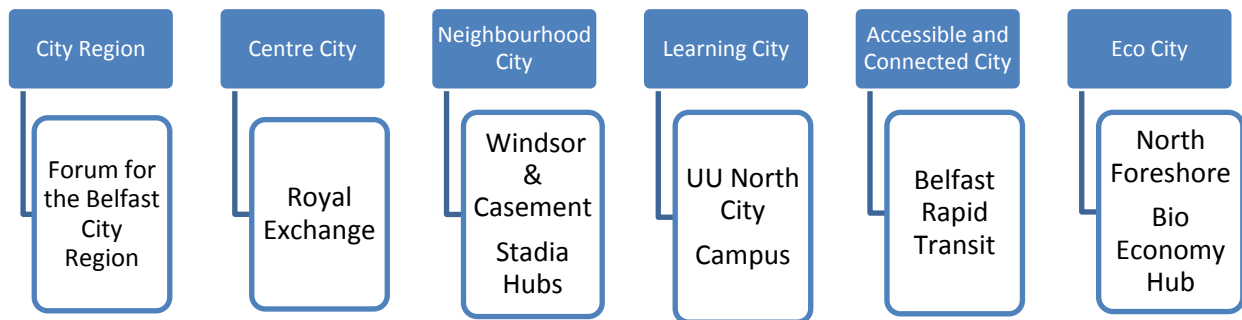
In order to try to safeguard against this situation and in accordance with the provisions of the Air Quality Action Plan, Belfast City Council will in collaboration with key stakeholders consider what additional air quality control measures may be required for the city.

Draft (Jan 2012)

## 5.4 Project Priorities with Identified Citywide Impact

As part of this review, five priority projects have been selected for each of the revised objectives on the basis of an identified citywide impact, the availability of funding and progress towards delivery.

It is anticipated that these strategic projects identified below and in **Figure 11** will have transformational and beneficial effects that extend beyond the local areas to the city region. The City Council will focus efforts on achieving optimal outcomes in each case.



**Figure 11 Strategic Project Priorities**

## 5.5 Why these projects?

### The University Of Ulster Campus

Probably the most important single construction project in the city in the last fifty years. This project has secured substantial public funding and will be delivered over the coming years. It builds the city's international profile as a centre of learning and will have a catalytic impact on the regeneration of the north inner city.

### North Foreshore

Enables the City Council to develop a new bio-economy business hub in the city that will help to develop a new capacity and expertise in the green technology sector. The hub will be a centre for energy and resource recovery research and development and will be one of the first projects of its kind in Europe. This will pioneer innovation and help to platform a new business sector for the city.

### Bus Rapid Transit

The new BRT project has the potential to transform how the city moves and will help connect the neighbourhoods to the centre city in a cross city network. The project delivers on key issues of labour mobility, social inclusion and sustainable public transport and is a essential component in developing the long term competitiveness of the city.

### Windsor and Casement Stadia Hubs

The substantial commitment of funding towards the reconstruction of Casement and Windsor offers the opportunity to develop these projects as new mixed use service hubs for their respective neighbourhoods. This will address health and wellbeing, culture and arts and the upgrading of areas in much need of enhancement and physical cohesion.

### Royal Exchange

The Royal Exchange which has a significant commitment of public funding and is critical to building the city centre's national and international retail profile and to reinforcing its compelling attraction as a destination. It also rebuilds an extensive area at the heart of the city centre and will be an key component in developing linkages with the north inner city and University of Ulster campus.

## **6 IMPLEMENTATION**

Implementation is a fundamental strand of this strategy and is concerned with directing resources to deliver on identified and agreed objectives. Maintaining momentum and focused delivery over the period 2012 -2020 presents a number of challenges.

### **6.1 Setting Priorities**

The austerity era in public financing will demand that the city is selective in directing resources to where they will produce the greatest benefits for the entire city. The city must focus these resources and select its short list of game changing projects and commit to them. This requires continuous and focused alignment between the city investment programme and masterplan.

### **6.2 Organisational Structures**

Relationships and coordination between agencies is considerably advanced on its 2004 levels, largely because of the leadership of the City Council and the workings of the devolved government. However, issues and lack of progress in some instances can be traced to fragmentation of responsibility and lack of coordinated governance and structures.

There is an identified need to place responsibility and the means of delivery in the one place and coordinate this delivery at the appropriate spatial scale. There remains an absence in organisational capacity to address strategic issues at the level at which they occur; particularly at city region level. The Council needs to frame an appropriate mechanism for dealing with this as part of a partnership approach with DETI and other key stakeholders.

A lack of coordinated planning decisions has also resulted in a fragmented built environment. The imminent devolution of planning and transport functions under RPA coupled with the provisions of the Planning Act (Northern-Ireland) 2011 will improve the Council's capacity to deliver the masterplan strategy and present new opportunities for administrative structures to advance the implementation of integrated and evidence based approaches.

These will be advance with other provisions of the Planning Act, requiring Council to produce a statement of community involvement setting out when and how community engagement will take place, to keep under review the matters which may be expected to affect the development of the city and to pursue the objective of furthering sustainable development.

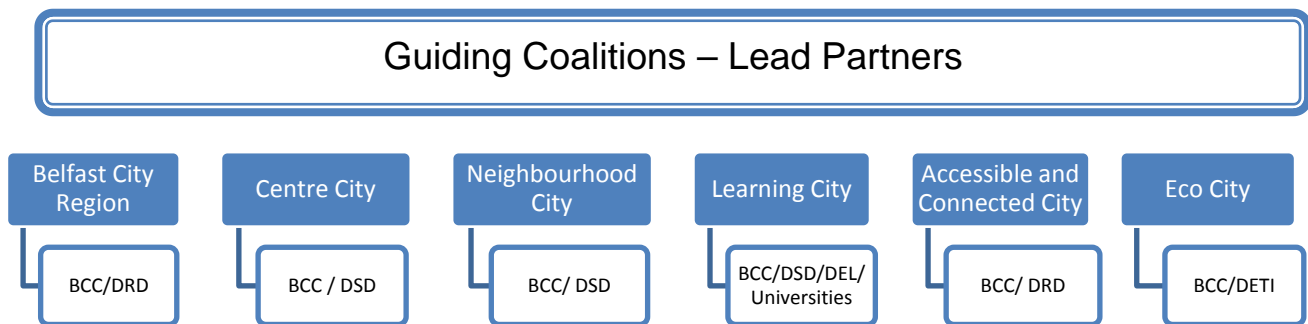
The local development plan will follow a 'spatial planning' approach; providing an integrated consideration of the issues affecting an area, with delivery as an essential part of this process. As there is no up to date statutory plan, the City Council will initiate dialogue with the DOE to begin work on an accelerated replacement for BMAP seeking to create a positive framework for change in those areas where action is required and deliver the public sector components, particularly where these assets can release funding and maximise public benefit.

### 6.3 Guiding Coalitions for Spatial and Strategic Objectives

The Council must use its influence to create new positive approaches to delivery that can harness the power of the city's institutions and the public, private and community sectors.

The first and most important step in the implementation process is developing consensus with key stakeholders. Implementation can then be structured in terms of stakeholder partnerships and collaborative working practices in addition to the coordination of physical assets and monetary resources. (The Local Enterprise Partnerships in the UK may serve as one precedent model)

The City Council has identified a number of guiding coalitions and lead partners that will work together to achieve the masterplan's spatial and strategic objectives.



### 6.4 Assessing Projects

In shaping and influencing emerging proposals, the Council with partner engagement will apply the spatial and strategic objectives and priorities as set out in this review in addition to the detailed consideration of

- Design issues and the relationship with physical context
- Addressing quality of life issues
- The use of employment clauses
- Transport and Organisational Plans (campus or other forms of faculty plans), particularly for significant trip generating uses such as universities, schools, hospitals and major commercial and residential development
- Functional open space / green space provision, accommodating facilities for sports, recreation and play as appropriate.
- Concerns raised by the local community

## 6.5 Issues for Further Review

As a review document, the scope precluded detailed analysis of certain issues within the city and there is a number of areas where evidential studies may be required in order to achieve objectives and policy priorities;

- The five Strategic Regeneration Frameworks could usefully be aligned and assessed against new priorities presented in this masterplan.
- A Framework for the City Centre should be prepared to cohesively address the potential for continued regeneration. An essential element of the framework would be to harness the opportunity to enhance the environment through quality design. A newly created senior position within the Council, with proven skills in urban design and placemaking would help drive this agenda.
- Activity to Support City Centre Living should be coordinated and developed, having regard to the analysis and recommendations arising from the City Centre framework plan.
- Using the strategic themes of this plan, a citywide assessment that would result in prioritising neighbourhood projects by evaluating regeneration impacts and availability of delivery capacity should be carried out
- To encourage investment and provide infrastructure by using alternative funding models. The Council will explore with partners the potential for public sector assets to support the plan objectives
- Consideration of whether additional air quality control measures may be required for the city, in light of binding targets,
- Develop an evidence base; in particular get a firm hold on issues such as the full extent of vacancy and dereliction citywide, the extent of the public sector estate in the centre city and the full extent of the NAMA portfolio within the City.
- Development of a set of key performance indicators to undertake future monitoring and review of the objectives of the plan.
- Engagement with the City's two airports and the Port of Belfast on the potential for more interaction with these gateways in respect of driving the economic performance of the city region and minimising the negative impacts of these gateways with the adjacent local areas



## Appendix 1

### Benchmarking best practice – Key messages from the State of the City debates

<b>City Region</b>	<ul style="list-style-type: none"> <li>• Unleash metropolitan engines; Cities must leverage distinct assets, attributes and advantages from the ground up. (Our universities, health sector and leading private enterprises)</li> </ul>
<b>Centre City</b>	<ul style="list-style-type: none"> <li>• Sustainable design; buildings should be more efficient in their use of water and energy and settlements should be more compact and dense.</li> <li>• Create strategies to reuse older buildings.</li> <li>• Consider the institutional masterplanning process which allows a long term look at universities and other institutions in terms of contribution investment within the centre city and to their integration with the community and their contribution to civic life.</li> <li>• Avoid singular iconic architectural landmarks</li> </ul>
<b>Neighbourhood City</b>	<ul style="list-style-type: none"> <li>• 'Smart-sizing' can improve outcomes in neighbourhoods experiencing decline</li> <li>• Take a new approach to the built environment; falling demand for space has important implications for the built environment policies and the approach to physical regeneration. As an alternative, strategies should focus on delivering the best outcomes for people.</li> </ul>
<b>Learning City</b>	<ul style="list-style-type: none"> <li>• Develop a creative and innovative bureaucracy</li> <li>• Combine technology with the city's vision for the future</li> <li>• Export more and waste less.</li> <li>• Understand the city's advantages in domestic demand, advanced research, venture capital, and entrepreneurial dynamism.</li> <li>• Extend and deepen the economic benefit of universities</li> </ul>
<b>Eco City</b>	<ul style="list-style-type: none"> <li>• Low carbon, is the hallmark of the next economy, is a market proposition rather than an environmental imperative.</li> <li>• Focus on infrastructure and environmental challenges.</li> <li>• Ecological restoration, urban design and transportation.</li> <li>• Reframe interactions with the natural environment. Reposition the area's natural systems, landscapes, transportation networks, and urban environments under a single theme of public health.</li> <li>• Recognise issues such as energy efficiency and biodiversity.</li> <li>• Ensure that environmental considerations are built into the decision making process and that community input and benefits (in the form of 'give backs') are considered.</li> </ul>
<b>Accessible and Connected City</b>	<ul style="list-style-type: none"> <li>• Improve travel times and ensure residents live within 10 minutes of a park</li> <li>• Focus on transit orientated development, where transit stops are located close to housing. Fixed transit stops can allow for regeneration hubs or clusters to develop</li> <li>• Free up land from roads</li> <li>• Apply the institutional masterplanning approach e.g. travel planning</li> </ul>

## Appendix 2

### Belfast City Council Transport Policy; Strategic Objectives

Core Subjects	Strategic Objectives	Key Themes
Civic leadership	To provide strong civic leadership for the promotion of a modern, safe, accessible and integrated transport system	Leadership Safety Accessible Integrated
Economy	To support the sustainable economic development of Belfast To ensure the future prosperity of Belfast City and its wider regions To facilitate the continues development of its economic and physical regeneration  These through achievement of sustainable transportation, economic, tourism, leisure, environmental, educational and health objectives	Economic development Future prosperity Physical regeneration Sustainable transportation
Viability	To secure the long term viability of Belfast City and its environment  By seeking to ensure that all transportation arising from wider proposals takes account, and mitigates against, adverse impacts on the environment and the quality of life for local neighbourhoods	Long term viability Adverse environmental impacts Adverse quality of life impacts
People and Communities	To support local people and communities  By ensuring a community plan approach that integrates transportation to enhance connectivity for local neighbourhoods by making them safer healthier and more inclusive	Support local people and communities Community planning Integrated transportation Enhancing connectivity Safety Health Inclusion
Accessibility	To seek to ensure that our services and facilities are accessible by sustainable modes of travel, such as walking, cycling and public transport	Accessible modes of travel Sustainable modes of travel Walking, cycling, public transport
Health	To promote the positive effects of sustainable travel and to lead by example  By implementing sustainable travel initiatives within Belfast City	Promotion Leading by example Implementing sustainable travel initiatives
Economy Urban Environment Environmental quality	To support the sustainable economic development of Belfast City centre, as a key connected and accessible regional asset To seek to improve an urban environment that supports a more dynamic and competitive centre To improve its presentation and environmental quality as befits a leading European City	Sustainable economic development Connectivity Regional asset Improved urban environment Dynamic and competitive City centre Improved City 'presentation' Improved environmental quality