

OXFORD ECONOMICS

Integrated Economic Strategy for Belfast 2014 - 2020

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1 Introduction

This paper provides an overview of the development of the Integrated Economic Strategy for Belfast 2015 – 2020.

It describes the context for the commissioning of the Strategy, the process by which was developed and the policy context within which the Strategy fits.

The Integrated Economic Strategy for Belfast 2015 – 2020 is supported by the following documents:

- Economics and Policy Synopsis (April 2014)
- Belfast City Narrative (April 2014)
- Terms of Reference for the Belfast Citywide Economic Partnership in the context of Local Government Reform and statutory responsibility for Community Planning

The Integrated Economic Strategy consists of three distinct parts:

- PART 1: Opportunities and Choices for Belfast: Identifies a number of issues which have emerged from the consultation processes and a range of opportunities and choices for Belfast.
- PART 2: Strategic Themes: Provides narrative by way of explanation for critical economic issues against which the framework and implementation plan are based.
- PART 3: Strategic Framework and Implementation Plan: Details a framework for the future development of Belfast in terms of strategic priorities and an implementation plan including the measurement of success. Strategic priorities are aligned to five key work priorities of the local economic development agenda for Belfast. These are:
 - *Leadership, strategy and research*
 - *Employability*
 - *Enterprise*
 - *Business Development*
 - *Sector Development*
 - *Physical Economic Regeneration*

1.1 Commissioning of the Integrated Economic Strategy for Belfast

The Integrated Economic Strategy (IES) for Belfast was commissioned jointly by Belfast City Council (BCC) and Invest NI (INI). The need for the IES arose from the recognition by BCC and InvestNI that to date there has been no definitive economic strategy for Belfast which was owned and contributed to jointly by the key players in the economic development of the City. In the past BCC developed its own economic development plans and a City Masterplan but these were the Council's strategies and did not commit Invest NI, enterprise agencies, the Chamber of Commerce and other partner organisations to an agreed and shared approach. The Terms of Reference for the IES described the requirement as follows;

' . . . there is a need for a cohesive and integrated economic strategy for Belfast in order to focus the approach and maximise the impact of partner interventions in this area. This strategy needs to connect the policies and actions of all relevant players together and should be owned collectively by key stakeholders in economic development . . . '

The Terms of Reference also noted that the IES should be closely aligned with key existing strategies and policies. In particular it was to be closely aligned with the Northern Ireland Economic Strategy and be, in effect, the Belfast centred approach to the delivery of that Strategy in the City. It was also to be aligned with key BCC policies such as the City Investment Programme and the Masterplan for Belfast and to provide the framework for drawing down EU funds by being closely aligned with the Europe 2020 priorities of smart, sustainable and inclusive growth.

In parallel with the development of the IES it was proposed, through separate actions, to establish a citywide economic partnership *'to steer, direct and oversee the city's economic transformation'*. That partnership has yet to be established in consideration of the Council's approach to Community Planning post Local Government Reform.

1.2 The Process of Developing the Strategy

Following a procurement process a consortium led by Oxford Economics was appointed to prepare the IES. A project initiation meeting was held in 2013 and a 3 stage approach was agreed, consisting of

- **Context Setting and Analysis**, essentially a desk exercise analysing the socio-economic status of Belfast, establishing city growth projections and scenarios and benchmarking Belfast's development against core UK and European cities
- **Identification of Priorities and Analysis of Opportunities**, including a wide consultation process involving a series of inter-sectoral workshops and one to one consultations with key city stakeholders in the public, private and community and voluntary sectors,
- **Key Recommendations and Strategic Planning**, developing the strategic approach, identification of priorities and associated actions, deliverables and targets, development of a comprehensive action plan and a robust monitoring and evaluation framework.

2 The Strategic and Policy Context

At the outset of the work it was agreed that the principal focus of the IES would be on the period 2015 – 2020 as existing strategies and policies, such as the Programme for Government, the Northern Ireland Economic Strategy and the InvestNI Corporate Plan are established for the period to 2015. This means that the IES will be implemented principally in the period following local government reform and in which BCC will have enhanced planning, regeneration and economic development functions.

The IES is set in the context of EU, UK and Northern Ireland policies and strategies and the existing policies of Belfast City Council and InvestNI. Those policies and strategies provide a constraint on the IES, but the constraints are less severe after 2015 when a new Programme for Government will be put in place and existing strategies, such as the Northern Ireland Economic Strategy, will be refreshed.

In this context the IES can have a number of different roles, including:

- In the short term, it is the City's framework for implementing the Northern Ireland Economic Strategy by rebuilding and rebalancing the City's economy and contributing also to the implementation of associated documents such as the Innovation Strategy for Northern Ireland
- Post Local Government Reform (LGR), in 2015 it will be a major input to the economic components of Belfast City Council's Community Plan for the City, and
- It will influence Belfast's submission to the consultation on reviewing and updating the Programme for Government for the period to 2020 and the associated documents such as the Northern Ireland Economic Strategy and Departmental and InvestNI Corporate Plans.

The proposed IES ambitions for Belfast are consistent with the objectives of the Northern Ireland Economic Strategy and those detailed in the Masterplan for Belfast.

The IES was prepared in parallel with the development of proposals for EU funding in Northern Ireland for the period 2014 – 2020. The consultancy team has worked closely with BCC staff and with the Managing Authorities of the ERDF and ESF programmes to integrate the EU 2020 Strategy approach into the IES and to develop a pipeline of ready projects to fit within the proposed ERDF and ESF Programmes for Northern Ireland.

3 Emerging Issues

A range of issues and questions arose from the consultation process.

3.1 Nature of the Integrated Economic Strategy

There was a strong feeling from the consultation process that the IES should be different in nature from existing strategic documents, which were seen as over-engineered, competing for resources and, often, ineffective. Consultees from central and local government and from business and community stakeholder organisations argued that the IES should be strategic in nature by picking 5 or 6 key themes in broad terms and refreshing an action plan under those key themes every 2 – 3 years in consultation with a wide range of economic partners. In this view, the IES should be a brief but compelling document which avoids excessive prescription at the outset but provides a strategic framework or scaffolding around which actions can be agreed and updated from time to time. This approach is comparable, for example, to the approach being taken in the recently published draft Innovation Strategy for Northern Ireland 2013 – 2025.

The five key themes around which the Integrated Economic Strategy is constructed are:

- A competitive and internationally connected city;
- A learning city developing the knowledge and skills of its people;
- A people centred and inclusive city, actively linking need with economic opportunity;
- A sustainable city with its own distinctive development approach;
- An accountable city, with an inclusive, participative and transparent partnership for economic development.

3.2 The Geography of the Strategy

There is a clear trend in policy elsewhere in the UK and in the EU to address urban issues on the basis of the economic geography of a city (its *'functional urban area'*), rather than its administrative boundaries. This is seen, for example, in the formation of Local Enterprise Partnerships in England and in the provision for Integrated Territorial Investments in the new EU Structural Funds Regulations. In Belfast's case adoption of such an approach would mean that BCC would have to work in association with the new local authorities of Lisburn and Castlereagh, Antrim and Newtownabbey and North Down and Ards. Such an arrangement would add to the difficulty of agreeing a succinct set of priorities for the City. It would also dilute the distinct urban nature of Belfast and would make implementation of an agreed programme of actions much more complex. However, it may make sense to operate certain key sub-strategies on the basis of the functional urban area in relation to topics such as business development and growth, exporting and the development of labour market skills.

3.3 Persistent Disadvantage

One of the key issues emerging from the statistical analysis and from the consultations and workshops is the persistence of disadvantage in particular areas of the city. Existing initiatives – such as Neighbourhood Renewal – have had limited impact in disrupting this cycle and there are fears that they may actually reinforce by seeking to deliver solutions within disadvantaged communities, rather than encouraging residents to open

out to opportunities in the wider city. In the context of the Council's Community Plan post 2015 a Citywide Economic Partnership will have to find new ways to tackling cycles of persistent disadvantage within the Integrated Economic Strategy. This will necessarily include an enhanced skills agenda for the city – but will need to be wider than just skills. Consultees and workshop attendees suggested that the approach needs to reach back into the educational system which sets (or limits) aspirations while peer and parental expectations are also important. The IES has presented an opportunity to devise a new comprehensive agenda to link residents of disadvantaged areas to economic opportunities elsewhere in the city.

4 Opportunities and Choices for Belfast

It is clear from the research undertaken that Belfast currently has a number of important opportunities which it can grasp, or fail to grasp, and also some difficult choices to make. This Section provides an overview of those opportunities and choices.

4.1 Spatial Priorities and the City Centre

A key issue relates to the spatial development of the City and, in particular, the role of the city centre. Across the UK and Ireland city centres have been facing major challenges in recent years. This is in part due to the prolonged and deep recession and its effect on consumers' disposable incomes and in part due to a structural change in the market in which local shops are being bypassed by consumers who instead order goods and services online. Given these challenges it is heartening that Belfast City Centre retains a vibrancy and continues to attract investment. The development of the University of Ulster's Belfast Campus will bring renewed energy to that part of the city centre.

However, it is clear that Belfast City Centre cannot be driven by retail and public sector investment alone. The City Centre has to find new roles if it is to continue to prosper during the period of the IES. The City Centre is Belfast's (and Northern Ireland's) shop window. It has unique roles for leisure, recreation, education, culture, creativity, tourism and shopping and it is a neutral place where people from all communities in Belfast can meet together.

The City Centre faces tensions as some of its existing roles are threatened with relocation to other locations in Belfast and beyond (Belfast Met, BBC, Sprucefield's development, The City Quays Development and the development of Titanic Quarter etc.). Belfast and Northern Ireland would be much the weaker if Belfast City Centre is allowed to become run down and to lose its vitality and attractiveness. This means that Belfast City Council as the planning and regeneration authority for the City from 2015 must find means of concentrating economic and social activity in the City Centre and the regional planning authorities must implement the commitment in the Northern Ireland Regional Development Strategy 2035 to maintaining Belfast City Centre's unique role¹.

There are a variety of policies which could be developed and implemented to extend the role of the city centre. These are already reflected in the Belfast Masterplan which commits to a range of actions including

- • *'ensuring an adequate supply of commercial (Grade A office space), living and retail space within the City Centre*
- • *produce and implement a Framework Plan for the City Centre;*
- • *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; and*
- • *prioritising environmental & design quality'.*

¹ SFG 3 in the Northern Ireland RDS 2035 reads *'Enhance the role of Belfast City Centre as the regional capital and focus of administration, commerce, specialised services and cultural amenities*

Opportunities to support Belfast City Centre need to be pursued with vigour and supported by the new regulatory and financial powers for planning and regeneration which Belfast City Council will have from 2015. There are opportunities to widen the range of policies used to support the city centre by providing for student housing in the city centre, conversion of office blocks for city centre living and promoting the further use of the city centre for educational and cultural purposes to supplement and reinforce the continuing functions of the city centre as a key retail, leisure, cultural and tourism location.

Strengthening the role of Belfast City Centre must not be at the expense of the neighbourhoods and communities which surround it. If the City Centre is to remain the dynamic core of the city it will be necessary to invest in modern and sustainable public transport arrangements and in innovative and effective labour market interventions which effectively link those throughout the City who are suffering unemployment and economic inactivity with the employment opportunities in the city centre and in other major employment locations such as Titanic Quarter and, in the future, the North Foreshore. Investment in sustainable public transport and effective labour market interventions are essential to the equitable development of Belfast.

4.1.1 Future City Centre Planning Policy

Whilst the current City Master Plan advocates avoiding or mitigating the adverse impact of developments in places such as Titanic Quarter (where there is currently some 4m sq. ft. of development with planning permission granted, including 600,000 sq. ft. for Phase 2 of the Financial Services Centre) the Plan falls short of indicating how this might be achieved. Northern Ireland town/city centre planning policy, in common with other parts of the UK, has traditionally focused the role of retailing in city centres. Over time this has resulted in the other town centre uses such as commercial offices, education, leisure and other high footfall activities moving out from city centres to out of centre locations. Arguably this has happened in Belfast on a significant scale already with the relocation of Belfast Metropolitan College to Millfield and to a new Titanic Quarter Campus, leaving several prominent city centre buildings empty and the student footfall removed from the City Centre.

The vibrancy and vitality of city centres is based on footfall, it's what feeds retailing and both day-time and night-time activities. However, a new approach to city centre policy making is forming. A recent review of town centres commissioned by the Scottish Government suggested that a broader view of Town and City centres needs to be taken to cover other uses beyond retailing, applying sequential testing to uses such as office development, leisure and education uses where these can be practically and beneficially accommodated in traditional city centre locations. With strategic City Centre planning under review by the Department of Environment (NI) and the devolving of planning powers (both development, management and plan making) to Belfast City Council in 2015, this is an ideal time to take stock of current and future measures to protect and enhance Belfast City Centre, as advocated in the Belfast Master Plan.

We support the Master Plan's measure of producing the pending City Centre Framework Plan, which will form the basis of a future statutory development plan produced by the City Council under its new planning powers.

4.2 Skills and Access to Employment

The IES must address the skills deficit within the city, build on Belfast's relative strength in respect to third level education and build bridges between those offering and those seeking employment. The 2011 census indicates an improvement in the percentage of the working age resident population with a degree level qualification or higher; up from 19% in 2001, to 26% in 2011. In many ways this is to be expected given that the city is home to two universities. The new University of Ulster campus at York Street will ensure that the

numbers of graduates being attracted to the city remains high. The Belfast City Masterplan has *Learning City* as one of its four strategic objectives. The Masterplan challenges Belfast to harness the economic powers of the city's higher education and further education institutions, whilst at the same time addressing the low levels of educational attainment within deprived communities. The IES must focus on opportunities arising from the increasing graduate population within the city and the skills they can contribute to the growing city economy. In addition there are other opportunities of a more entrepreneurial, technical and vocational nature provided by Belfast Metropolitan College through its rich and varied curriculum base. The greatest challenge however is to provide outreach into deprived communities, supporting those at level 1 and 2 to upskill, thereby improving the city's competitiveness. Approximately 30% of the resident population have no formal qualifications at all, and of course tend to be concentrated in areas of social and economic deprivation. The IES must ensure that better linkages are made across the city, between those areas offering employment, which are typically in the city centre and deprived neighbourhoods. A first rate public transport system is a necessity and if not addressed it will continue to hinder the city's economic prospects.

The IES recognises that Belfast City Council is unable to tackle these problems in isolation of others. A new approach is required. The IES proposes a new type of partnership which brings together central and local government with private partners and community stakeholder organisations. We believe the current UK City Deal model provides a vehicle which could be tailored and replicated in Belfast. We also propose that council takes an influential role in respect to the ESF Programme 2014-2020 by coordinating a new programme across the city based on UK models, of which Glasgow Works is a prominent example. The 60 plus ESF projects currently being delivered across the city is unsustainable and hinders a more strategic approach to service delivery. A Belfast ESF Programme would provide a better integration of employability and skills services, a more strategic city wide focus and help to avoid duplication and competition between local service providers which is currently the case.

4.3 Sectoral Priorities

Belfast's international reputation is built on its rise as a major manufacturing city. However, manufacturing has declined in Belfast and it currently accounts for just 4.4% of employment compared to a Northern Ireland average of 10.9% and a UK average of 10.2%. Much of the manufacturing industry which Belfast has lost has gone overseas and will not be recovered, but Belfast has opportunities for employment growth and realisation of those opportunities will require a strong focus on the growth or opportunity sectors.

The opportunity sectors for Belfast include telecoms and ICT (currently estimated to have potential to grow by 20,000 jobs in Northern Ireland, but mostly concentrated in Belfast), professional and administrative services (including in particular legal and financial administration), advanced manufacturing (including renewable energy and low carbon technologies), life and health sciences, the creative and cultural industries, tourism and the social economy.

These identified sectoral priorities are in broad alignment with the sectors identified in the Northern Ireland Economic Strategy.

Each of these sectors includes both businesses indigenous to Belfast and international companies choosing Belfast as a preferred location for their operations. But the sectors are very diverse and some have very specific locational requirements. It is important that appropriate accommodation is available for each type of business and in appropriate locations across the city. It is particularly important that Belfast has accommodation for both indigenous and overseas-owned firms in each of the identified sectors, recognising that each of the sectors is different and some are not suited to a city centre location but can still provide employment and investment benefits to all of the City's population if they are accompanied by investment in sustainable public transport and effective labour market interventions.

4.4 Enterprise Zones & Economically Significant Planning Zones

Enterprise Zones (EZs) have become an important instrument of economic growth strategies elsewhere in the UK, but there are no EZs in Northern Ireland. In total 44 geographical areas have been designated as EZs in England, Scotland and Wales. The approach taken in each of these jurisdictions has varied a little but each draws on a common menu of features including a specific sectoral focus for each Zone, 100% business rate relief for up to a 5 year period, a simplified planning regime, availability of superfast broadband and 100% first year capital allowances for investment in plant and machinery (referred to as Enhanced Capital Allowances or ECAs). Not all of the EZs have all of these features and in particular ECAs have only been designated for those EZs with a sectoral designation likely to require a high level of investment in plant and machinery, i.e., relatively capital intensive processes.

Many of the benefits of EZs elsewhere in the UK are available already across Northern Ireland. However, ECAs are not available in any part of Northern Ireland and the attraction of designating an area as an EZ in Northern Ireland lies largely in the availability of ECAs in that Zone. In a joint statement of June 2013 of the UK Government and the Northern Ireland Executive, the Government stated that it would be willing to consider designating a range of sites within any Northern Ireland Enterprise Zone as designated areas for ECAs. The designation of an area or areas of Belfast as an Enterprise Zone would, therefore, open the way for ECAs to be available in the City.

This, then, leads on to the question of which, if any, areas in Belfast should be designated as EZs. If Belfast wishes to maximise the economic impact of an EZ it is essential that the area chosen is suitable for capital intensive inward investment, of the type which can benefit most from ECAs. If the area designated is not suitable for capital intensive inward investment then the effect of an EZ would be only to move existing economic activity from one location to another in Belfast or in Northern Ireland and a windfall gain for any existing companies in the designated area. In addition to being suitable for the specific sectoral requirements of capital intensive inward investment companies, sites selected for EZ status must have appropriate existing infrastructure such as electricity and gas supplies, high speed broadband and appropriate waste management facilities.

4.5 Creativity and Innovation

In the nineteenth century Belfast became a great industrial city with pioneering social and cultural institutions because of its creativity and innovation. Despite a lack of raw materials, a port which then constrained trade greatly and its distance from major markets, Belfast became one of the major industrial cities of the world. The innovation which occurred at that time was truly disruptive of world markets, but it also had important social and cultural dimensions.

Creativity and innovation go hand in hand. Creativity is the ability to generate new and novel ideas, processes, concepts, services or approaches. Innovation is the successful application of those ideas.

If it is to realise its full potential Belfast needs to maximise the creativity of its people and to innovate in economic, social and cultural terms. As has happened before in the City, there is an opportunity for a positive spiral of creativity and innovation leading to new approaches to economic, social and cultural issues. Creativity and innovation are cross-cutting themes which are not only concerned with the generation, exchange and exploitation of knowledge, but also with fundamental cultural change.

The Department of Enterprise, Trade and Investment (DETI) has published a draft Innovation Strategy for Northern Ireland 2013 – 2025. There The objectives of the Belfast Integrated Strategy must align with the wider objectives of the Northern Ireland Innovation Strategy, which aims to transform Northern Ireland into one of the most innovative regions of the UK by 2025. Indeed, if Belfast does not embrace creativity and

innovation it will be unlikely that the Northern Ireland strategy will achieve its objectives as many of the most innovation active firms in Northern Ireland and much of the innovation support network is based in Belfast.

There is the opportunity for Belfast to develop a City Creativity and Innovation Strategy which not only supports the Northern Ireland strategy but widens the agenda to reap benefits for the cultural and social life of the city and reinforce Belfast's reputation as a creative destination. A City Creativity and Innovation Strategy would take the concept of creativity and innovation out of the boardroom and the laboratory and bring it on to the streets of the city, into communities, into classrooms, into the Council and its public sector partners and into the culture of the City.

In setting out a City Creativity and Innovation Strategy, Belfast City Council would be starting from a strong base. Existing actions include the Council's investment in the creative and cultural industries in the city, proposals already in the Belfast Investment Programme 2012 – 2015 include a Green Economy Business Park, an Innovation Centre and a Creative Hub. There is also a successful Events Programme including Culture Night which demonstrates the range and diversity of the City's offerings. In economic terms Belfast has major strengths in the research of its two Universities and the applied knowledge provided by Belfast Metropolitan College, it hosts major research centres of international and global reach and it has an active innovation support agency in the Northern Ireland Science Park and its NISP Connect Programmes. The University of Ulster is developing proposals for an Animation Centre of Excellence. In sectoral terms Belfast has a range of highly innovative and internationally competitive ICT companies and there are particular opportunities in other sectors such as renewable energy and low carbon technologies. Belfast's reputation for excellence in the provision of health services together with its technological resources create real opportunities for leadership in connected health, which recent studies have suggested has the potential to become a driver for economic development and in relation to which a Connected Health Collaborative Network is currently being considered.

The interaction of Belfast's cultural and creative industries and its technology industries offers the opportunity to create an '*information city*' or '*smart city*' initiative developing and exploiting linkages between broadcast companies and ICT companies to create and market new products to international markets and to create new marketable skills in the Belfast population. This is already happening in many businesses and many locations across the city but there may be merit in concentrating the activity in a particular location adjacent to the University of Ulster campus in a way comparable to *iCity London*, which is creating a new digital quarter for London on the former Olympic site in east London.

4.6 Partnership, Accountability and Thought Leadership

The Integrated Economic Strategy for Belfast takes the place of the myriad of current, competing strategies, plans and priorities for Belfast. It is envisaged that the Integrated Economic Strategy will form the economic component of the Belfast Community Plan, with which public authorities will – by statute – have to cooperate.

Belfast City Council has already identified the principle of a Citywide Economic Partnership as the economic strand of the Community Plan post Local Government Reform. This is an inclusive partnership of the private and public sectors with voluntary and community stakeholder organisations in the City, working together to advance an agreed agenda for Belfast. Further definition of the roles and responsibilities of the Citywide Economic Partnership is required within the context of the Council's future approach to Community Planning.

Too many strategies sit on shelves and do not influence the priorities and behaviour of key organisations across the city. If the Integrated Economic Strategy for Belfast is to make a difference it must be owned and have the commitment and energy of not only Belfast City Council and InvestNI but also of a wide range of other organisations across the City. It must make the development of the City to an agreed agenda a

genuine joint venture of all partner organisations. It must form an effective coalition for the development of Belfast.

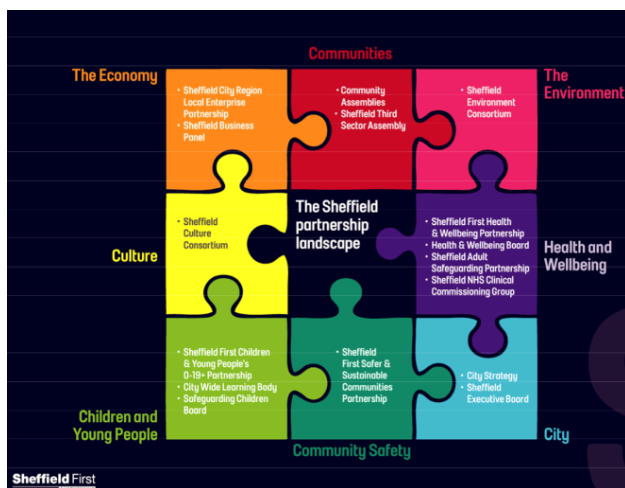
In addition to having a genuinely widely based, inclusive and participative partnership for development, there must be arrangements for making that partnership and the work of member organisations accountable to citizens and stakeholders. The effective communication of the strategic approach is an important starting point for development but it must also be coupled with honest, timely and accurate reporting of progress against the plan, acknowledgement of challenges and identification of new opportunities. Regular, public reporting will give confidence to citizens and investors that the Partnership is making progress on the development of the City and provide an incentive for them to participate in its development, at local, community and city-wide levels.

Belfast City Council cannot achieve these outcomes on its own, it needs to develop a sense of partnership with a range of key organisations, put in place arrangements for them to participate in joint decision making for the City and contribute to resourcing the resulting actions and investments. The role of the City Council in this development model is to convene the partnership, to resource it, to prompt the partnership by setting an informed agenda and – like the other organisations in the partnership – to align its expenditure and investment priorities to support the agreed agenda.

In this joint venture Belfast can learn from the other great cities of the UK and Ireland, such as Sheffield, Leeds and Dublin.

The Sheffield Executive Board is part of the wider Sheffield First Partnership. The function of the Sheffield partnership is to *'provide leadership within the city on issues of city wide significance, and to advocate for Sheffield collectively to Government, the European Union and other national and international forums'*.

Diagram 1: Overview of the Sheffield



In Sheffield the Board is comprised of leaders from across the private, public, voluntary, community and faith sectors. It is a non-statutory body which can also be characterised as the "Group Board" for Sheffield's public services, each of which continues to operate independently within their own accountability framework, but member organisations commit to align their corporate strategies with the overall strategies for the city. The Chair of the Sheffield Executive Board is the Leader of Sheffield City Council. The Deputy Chair is elected from among the other member organisations. The Board has overall responsibility for delivering on the Sheffield City Strategy and priority outcomes. The Board publishes an annual 'State of Sheffield' report to demonstrate progress on the implementation of the City Strategy.

The creation of the Citywide Economic Partnership would meet the requirement in the guidance on Community Planning recently published by the Department of the Environment, which states

'Bringing the key public sector agencies together is a necessary part of an effective community planning process, but is not sufficient on its own to promote successful community planning. Beyond the public sector there is recognition that there are a wide range of businesses, voluntary organisations, community and other groups which make vital contributions to promoting the social, economic and environmental well-being of an area.'

Under the proposed legislation for community planning councils and their partners will monitor progress against community planning objectives and produce a statement on progress. Community planning should focus on results rather than process and should ideally be measured in relation to the outcomes it achieves.

However, achieving outcomes requires a series of intermediate steps, some taken by individual bodies and some jointly. Being able to monitor progress and performance calls for robust and sound data/information, as well as integrating performance improvement and accountability frameworks that connect with the actions of local and central government and key agencies.'

The IES has embraced the opportunity for Belfast to take the initiative and go beyond the requirements of the Department of the Environment guidance and use the Citywide Economic Partnership structure to develop and drive key City strategies, such as the proposed City Creativity and Innovation Strategy, and by that means achieve in Belfast the kind of alignment of city and corporate strategies that is demonstrated in the partnership structures in place in Sheffield and other cities.

Finally, there is also the opportunity to use the Citywide Economic Partnership as a means of monitoring progress towards achievement of the Citywide Strategy and also of monitoring international best practice across a number of dimensions of urban renewal and growth through the provision of some form of observatory of best practice which would provide Belfast with access to leadership in thinking about and implementing creative and innovative urban policies.

Please also refer to the supplementary paper titled Terms of Reference for the Belfast Citywide Economic Partnership.

5 Strategic Themes

5.1 A competitive and internationally connected city

Belfast has an international brand which is recognised worldwide. Belfast city is the location of choice for many of the world's leading companies and is second only to London in respect to attracting foreign direct investment. The city has considerable assets to offer to investors including a young, relatively well skilled population, home to two internationally renowned universities and first class economic infrastructure. Belfast City Council has recently led a number of trade missions to China, India and the USA which have been highly successful in respect to relationship building between cities and identifying new opportunities for Belfast based businesses. The IES recognises the importance of Belfast as an inward investment location; indeed 60% of all FDI to Northern Ireland is in Belfast. A new **Belfast brand** is being developed which will be used in all future international marketing campaigns. The brand will be important in the development of an **international investment proposition** which will require a new commitment to partnership working between Belfast City and key government bodies, in particular Invest NI.

Belfast City Centre faces significant challenges in respect to product development and competition from out of town shopping centres and online shopping. Added to this is the lack of **Grade A office accommodation** which requires urgent consideration from government. It is proposed to commission an audit of office accommodation available in Belfast City and attempt to map it against existing and potential need from investors into the city centre.

The location of the new **University of Ulster Campus** and the proposed **Royal Exchange development** provide an opportunity to plan and develop city centre living, new leisure and retail mix which can support sustainable regeneration within the city core. The integration and coordination of these developments provide opportunities which come around once in a lifetime to regenerate and expand the city centre to the outer northern core.

Enterprise development and promotion will become a responsibility of Belfast City Council post Local Government Reform (LGR) and therefore an opportunity for council and its local partners to facilitate the establishment of a pro enterprise business environment. Business start-up rates have been poor in the city council area in recent years. Under the council's new **local economic development plan** it is proposed to provide **enterprise start-up services** over and above what is currently being provided. In addition new services will be provided to nurture and grow existing businesses with a particular focus on sectors including **creative industries, financial services and hospitality and tourism**.

Post LGR there will be **eight local enterprise centres** operating in the city council area. These centres operate independently of one another, the council and Invest NI. The enterprise agencies operate primarily to provide workspace provision and business services. The manner in which local enterprise agencies currently operate does not support strategic citywide economic coordination. Conversations need to commence with the local enterprise agencies as to their role within the city post LGR and within a more strategically focused direction for enterprise promotion in the city.

Super Connected Belfast will enhance connectivity and broadband services across the city. The council proposes to implement a programme in advance of infrastructural development which will animate and engage with businesses and local communities. This provides real opportunities for growth sectors such as creative industries and financial services which require high speed broadband services. It will also directly support the development of a Belfast City Investment Proposition as Belfast will be rightly able to promote itself as a city of super connectivity in comparison to others.

***'A competitive and internationally connected city'* key work priorities:**

- Citywide economic co-ordination of local enterprise partners.
- Strengthen relationships with Invest NI Trade Team to add value to the Councils' International Relations Framework and support further FDI.
- Support Universities & Belfast Metropolitan College to attract additional international students.
- Increase business start-up rates.
- Deliver enterprise & start-up services.
- Develop a single business support continuum through which businesses can evolve/access relevant support depending on their needs.
- Increase number of exports by Belfast-based companies.
- Support an enterprise culture in education aligned to forecast future growth sectors.
- Work with Invest NI to improve opportunities for investment in Belfast.
- Collaborative development of an International investment proposition.
- Benchmark of investment accommodation needs versus supply and work with private sector to address this issue.
- Extend the strategic development of Belfast as a super-connected city in line with a Smart City Agenda.
- Strengthen Belfast's position as an inward investment location.
- Create opportunity for investment in Grade A office accommodation.
- Maximise regeneration for inner city living.

5.2 A learning city developing the knowledge and skills of its people

The challenge for Belfast is twofold; to focus on those with no skills which at 30% of the working age population presents a barrier to economic growth and also to continue to grow the percentage of those with a degree level qualification or higher which currently stands at 26% of the working age population. Skills and training is fragmented throughout the city and the IES recognises that if this is allowed to continue it will remain difficult to facilitate the impact required. It is proposed that Belfast City Council and the Department for Employment and Learning commission a **Belfast City Employability and Skills Strategy** which will build upon the experiences of the City Strategy / City Deal models already being delivered in cities across the UK. Ultimately, the goal of an employability and skills strategy will be to increase the working age employment rate, increase the percentage of the working age population with Level II skills and above and to ensure that universities are providing industry relevant qualifications which can help to grow the local economy.

The new **University of Ulster campus** is scheduled for completion in 2018 and provides an opportunity to totally change the face of York Street and surrounds. It is proposed to create a high level strategic project team, supported by other professionals to help plan and shape the regeneration of that particular area of North Belfast. In addition it is proposed to develop a new programme of coordination between **Belfast City Council, Invest NI, Queen's University and the University of Ulster** to ensure that all the benefits of being the home to two universities and the associated spin off from research and development can be located, nurtured and supported within the city.

The next round of **European Social Funding** for Northern Ireland is scheduled to run from 2014-2020. The consultation period is now over and public calls for funding could commence 2014. Over 60 ESF projects were located in Belfast City in the last round of funding. This undoubtedly led to fragmentation and duplication across the city. It is proposed that Belfast City Council and its government partners work to achieve greater alignment between locally identified needs and **employability support provision for target groups** to ensure that city wide priorities are established and supported. Belfast City Council has already undertaken some work in respect to this model and has developed linkages with Glasgow City Council who run a council led ESF programme called Glasgow Works.

Finally, there has been considerable work already carried out in respect to Local Labour Clauses primarily by NI government departments but also by some local authorities and larger community and voluntary sector organisations. It is proposed that Belfast City Council leads the development of a universal local labour clause which will be adopted across government and become the accepted template for all future regeneration projects.

'A learning city developing the knowledge and skills of its people' key work priorities:

- Effective civic leadership by learning from Industry experts.
- Develop model of economic intelligence-sharing across the city.
- Implement Smart City agenda.
- Strategically influence the European Social Fund Programme 2014-2020.
- Develop a Belfast City employability & skills strategy to ensure greater alignment between supply and demand skills.
- Capitalise on the unlocked economic potential of the increased future student population located in Belfast City Centre.
- Further explore potential for education - business linkages in key sectors to maximise opportunities for innovation.
- Strategically influence through Council intervention the complementary proximity of services and assets in parts of the city to accelerate the growth of future economic clusters through knowledge transfer, pooled resources and shared target markets. For example creative and digital media services in Cathedral Quarter aligned to Universities and Colleges.

5.3 A people centred and inclusive city, actively linking need with economic opportunity

One of the great challenges facing Belfast is to ensure that whole neighbourhoods do not get left behind and excluded from future economic growth. A report commissioned by Belfast City Council into future skills demand (Belfast Skills Demand and Supply, Oxford Economics, 2008) highlighted that over half of new jobs in Belfast over the next decade will require graduate qualifications and only one in seven are expected to require no qualifications. It went on to state that 'by 2015 we still forecast 12 wards with a resident employment rate of less than 50%'. It is important that **a greater focus is provided on those areas of greatest economic and social need.**

The introduction of the Rapid Transit System potentially provides one of the answers to a barrier recognised in research carried out into long term unemployment and economic deprivation, that is mobility. The Rapid Transit System will provide an improved infrastructure for travelling to and between areas of the city. Translink, the Department for Regional Development and Belfast City Council need to develop a reward / enticement scheme for unemployed people to use rapid transit, particularly where an employment outcome can be achieved.

The new Steps to Success Programme will replace the existing Steps to Work Programme as the Department for Employment and Learning's main adult back to work programme in 2014. Steps to Success is based on Payment by Results (PBR) and rewards providers for securing sustainable employment for its clients. Training is not a core element of the new Steps to Success Programme. It is proposed that council and its partners work with the new prime contractor of Steps to Success in Belfast to ensure that training and skills enhancement can be incorporated into the new programme. It is proposed that a **Belfast Steps to Success Skills Pot** be established as part of the new strategic skills and employability programme.

The proposed **Belfast Works Programme** which is being led by Belfast Strategic Partnership (Belfast City Council, Belfast Health & Social Care Trust and the Public Health Agency) seeks to redress health inequalities which impede residents from actively participating in the local labour market. The IES recognises the importance of tackling serious health conditions which are particularly prevalent in the most disadvantaged wards of Belfast in order to improve the overall economic performance of the city region. The IES will seek to support projects established through Belfast Works, in particular those projects which address health related barriers to employment.

Belfast City Council will seek to secure European Regional Development Funds (ERDF) to support the development of social enterprises as a vehicle to redress spatial deprivation. The Belfast Social Enterprise Programme will incorporate funding for social enterprises, training and capacity development for fledging businesses and networking opportunities.

'A people centred and inclusive city, actively linking need with economic opportunity' key work priorities:

- Develop a communication plan and engagement channels with local and area based partnerships to strategically deliver local and city-wide economic regeneration.
- Ensure alignment between IES priorities and activities in Community Plan.
- Work with Belfast Strategic Partnership to consider how to address life inequalities by investing in employability support.
- A particular focus of enterprise activity on traditionally under-represented or hard to reach groups.
- Support the growth of Social Enterprises.
- Maximise economic impacts of a Rapid Transit System and Belfast Transport Hub.
- Promote opportunity presented by the Northern Ireland Rural Development Programme to Belfast's most rural areas.

5.4 A sustainable city with its own distinctive development approach

Belfast City Centre retains vibrancy and continues to attract investment, even given the additional adverse conditions the city has faced in recent times. The development of the University of Ulster's Belfast Campus will bring renewed energy to that part of the city centre. However, it is clear that Belfast City Centre cannot be driven by retail and public sector investment alone. The City Centre has to find new roles if it is to continue to prosper during the period of this Strategy. The City Centre is Belfast's (and Northern Ireland's) shop window. It has unique roles for leisure, recreation, education, culture, creativity, tourism and shopping and it is a neutral place where people from all communities in Belfast can meet together. **Belfast City Council as the planning and regeneration authority for the City from 2015** must find means of concentrating economic and social activity in the City Centre and the regional planning authorities must implement the commitment in the Northern Ireland Regional Development Strategy 2035 to maintaining Belfast City Centre's unique role.

There are a variety of policies which could be developed and implemented to extend the role of the city centre. These are already reflected in the Belfast Masterplan which commits to a range of actions including:

- • 'ensuring an adequate supply of commercial (Grade A office space), living and retail space within the City Centre
- • produce and implement a Framework Plan for the City Centre;
- • 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 and design quality

Strengthening the role of Belfast City Centre must not be at the expenses of the neighbourhoods and communities which surround it. If the City Centre is to remain the dynamic core of the city it will be necessary to invest in modern and sustainable public transport arrangements and in innovative and effective labour market interventions which effectively link those throughout the City who are suffering unemployment and economic inactivity with the employment opportunities in the city centre and in other major employment locations such as Titanic Quarter and, in the future, the North Foreshore. Investment in sustainable public transport and effective labour market interventions are essential to the equitable development of Belfast.

Enterprise Zones (EZs) have become an important instrument of economic growth strategies elsewhere in the UK, but there are no EZs in Northern Ireland. The approach taken in the existing EZs has varied a little but each draws on a common menu of features including a specific sectoral focus for each Zone, 100% business rate relief for up to a 5 year period, a simplified planning regime, availability of superfast broadband and 100% first year capital allowances for investment in plant and machinery (referred to as Enhanced Capital Allowances or ECAs). **Belfast City Council should urgently commence discussions with OFMDFM and DETI to secure an EZ for an area or areas of Belfast.**

'A sustainable city with its own distinctive development approach' key work priorities:

- Identify & share funding opportunity aligned to strategic priorities (EU and other sources).
- Explore models for public private partnership and / or private sector sponsorship of an enhanced economic infrastructure.
- Direct and indirect job creation through achievement of Council led strategic capital schemes:
 - Forthriver Innovation Centre
 - Cathedral Quarter
 - Creative Hub
 - North Foreshore
- Address current gaps in business deaths and births. Stabilise business birth rate in-line with business death-rate in the medium term.
- Support the strategic implementation of BIDs.
- Explore potential of agenda for Belfast Enterprise Zone area or areas.
- Attract new generation industry through Council led strategic capital schemes:
 - Forthriver Innovation Centre
 - Cathedral Quarter
 - Creative Hub
 - North Foreshore
- Engage creative and digital sector against a Smart City Framework to explore added value innovative new-generation solutions
- Concentrate economic & social activity in the City Centre.
- Promote the use of derelict land & underused buildings.

5.5 An accountable city, with an inclusive, participative and transparent partnership for economic development

The Integrated Economic Strategy for Belfast is being prepared to take the place of the myriad of current, competing strategies, plans and priorities for Belfast. It is envisaged that the Integrated Economic Strategy will form the economic component of the Belfast Community Plan, with which public authorities will – by statute – have to cooperate. In order to effectively deliver the IES Belfast City Council is committed **to the establishment of a Citywide Economic Partnership**. This would be an inclusive partnership of the private, public, voluntary and community sectors in the City, working together to advance an agreed agenda for Belfast.

Too many strategies sit on shelves and do not influence the priorities and behaviour of key organisations across the city. If the Integrated Economic Strategy for Belfast is to make a difference it must be owned and have the commitment and energy of not only Belfast City Council and InvestNI but also of a wide range of other organisations across the City. It must make the development of the City to an agreed agenda a genuine joint venture of all the partner organisations. It must form an effective coalition for the development of Belfast.

In addition to having a genuinely widely based, inclusive and participative partnership for development, there must be arrangements for making that partnership and the work of member organisations accountable to citizens and stakeholders. The effective communication of the strategic approach is an important starting point for development but it must also be coupled with honest, timely and accurate reporting of progress against the plan, acknowledgement of challenges and identification of new opportunities. The IES recognises the value of the Belfast State of the City Events and Reports and proposes an annual event followed by the publication of a State of the City Report which highlights progress in respect to the IES and other key policy documents.

‘An accountable city, with an inclusive, participative and transparent partnership for economic development’ key work priorities:

- Establish a city-wide economic partnership for Belfast in the context of community planning.
- Collectively develop a central Citywide economic model to scenario plan impact of Citywide economic partnership activity.
- Council facilitated state of the city events.
- Effective, timely & transparent monitoring & evaluation.
- Within the context of the Belfast City Council Community Plan identify and share skills gaps and deficiencies in the labour market with Citywide economic partnership stakeholders.
- Measure and share the type and quality of business outputs to regularly measure cost / benefit.
- Ensure agreed pipeline of support for businesses, avoiding duplication of effort.
- Facilitate a referral service for a streamlined, customer focused service amongst stakeholders.
- Champion an effective lobby to address local business issues arising from annual business surveys.
- Economic impacts of capital investment propositions clearly articulated and shared through a consistent reporting process.

6 Implementation Plan

Achievement of the Integrated Economic Strategy for Belfast will require a period of defining roles and collective agenda setting. A key component of this is the formation of a Citywide Economic Partnership within the context of Community Planning. The strategic framework in Section 5 does not detail specific projects to bring-about the long-term economic impacts. It is envisaged that an annual action plan will be agreed by the Citywide Economic Partnership. It is realised that, in the short-term action plans may be a collection of individual agency and stakeholder deliverables contributing to each of the five strategic themes. A period of joint economic modelling and forecasting will be facilitated in the medium-term towards achieving a cohesive agenda for the achievement of mutually beneficial and shared annual targets as part of an inter-agency annual action plan.

Significant scoping is required to develop a communication plan and engagement model through which the Citywide Economic Partnership can best engage with local area based partnerships to strategically deliver local and city-wide economic regeneration.

Table 1 overleaf details the draft implementation plan for the achievement of the Integrated Economic Framework in the short-term (2015-2016), medium-term (2016-2018) and long-term (2019 - 2020).

Table 1: Implementation Plan for the achievement of the Integrated Economic Strategy 2015 - 2020

<p>SOWING</p> <ul style="list-style-type: none"> - <i>Evaluating</i> - <i>Prioritising</i> - <i>Rebalancing</i> - <i>Aligning</i> - <i>Partnering</i> - <i>Agenda Setting</i> - <i>Benchmarking & Modelling</i> 	<p>GROWING</p> <ul style="list-style-type: none"> - <i>Facilitating</i> - <i>Engaging</i> - <i>Implementing</i> - <i>Funding and Resourcing</i> - <i>Evaluating and Monitoring</i> 	<p>REAPING</p> <ul style="list-style-type: none"> - <i>Job Creation</i> - <i>Business Growth</i> - <i>Business Start</i> - <i>Investment</i> - <i>Sector Growth</i> - <i>Employability</i>
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SHORT-TERM	MEDIUM TERM	LONG TERM
“Inputs”	“Investment”	“Impact”
2015/2016	2016/2017 and 2017/2018	2018/2019 and 2019/2020
<ul style="list-style-type: none"> • Implement tiered approach to city-wide stakeholder communication • Join up intelligence systems with key strategic stakeholders • Local economic development stakeholder roles, responsibilities and models for delivery defined through Local Government Reform • Evaluation of third-party funded delivery models to inform a joined-up procurement approach which invites private sector expertise • Formalise strategic working relationships through Memorandums of Understanding 	<ul style="list-style-type: none"> • Agreed strategic position to tackle key work priorities • Formalised targets and resources aligned across strategic citywide economic stakeholders • Proposals fully economically appraised • Fully integrated economic action plan agreed • Centralised governance of project delivery 	<ul style="list-style-type: none"> • Citywide efficient service delivery • Value for money and economies of scale achieved • Achievement of targets and pre-determined outputs • Best practice established • ED services aligned across all stakeholders.

7. Measuring future success

At the time of writing, the IES has no official tangible targets, given that the City-wide Economic Partnership terms of reference has not yet been adopted by partners and the partnership has not yet convened. Once potential IES partners like the Council, DETI, InvestNI, DEL, DENI, Translink, the Higher Education institutions and the Further Education colleges come together and set out what they are working on, a combined set of targets can be established aligned to a pre-agreed annual action plan.

Establishing targets

The setting of targets will be an important milestone for the IES and it is likely to consider a mix of both demand and supply side actions and aspirations.

These targets can then be robustly modelled so they are consistent with one another. Multiplier impacts through supply chain spending and consumer spending should be considered and the resulting impacts on sectoral growth, unemployment, inactivity, migration, population, housing demand, GVA, productivity, and wages can then be estimated.

The Integrated Economic Strategy Stage 1 economic and policy synopsis report provided an assessment of the current and future performance of Belfast. In the absence of official targets for the IES it is proposed that future success is measured against the current performance of the economy and the baseline forecast trajectory set out in the report (refer to Table 2 titled 'Baseline Economic Metrics'). There are issues with adopting this approach, not least that the baseline position outlined was consistent with published data and Oxford Economics forecasts in early 2013. The economic landscape has evolved since that time, and will continue to do so over the remainder of the forecast period up to 2020. As such, measuring against this sort of benchmark is only feasible in the very short to medium term (2015-2017) and the IES emphasises that once targets are established, they should supersede any benchmarking against the Stage 1 report.

Nonetheless, Table 2 overleaf provides a high level overview of current and forecast performance of the Belfast economy.

Table 2: Benchmark Economic Metrics

Metric	2013 performance	2020 Baseline forecasts	Source	Measuring future success
Total employment	210,200 jobs	219,100 jobs (representing average annual growth of 0.6%, just behind Bristol and Rotterdam)	Census of Employment published by DETI	A faster rate of jobs growth over the period moving Belfast up the rank table of comparator European cities
Unemployment rate	7.8% under ILO	7.2%, still the highest of any UK city comparator analysed in this report. (Between 2001 and 2008 unemployment rates in Belfast were between 6% and 2%).	International Labour Organisation or ILO measure of unemployment available on Nomis	The unemployment rate should move below the baseline outlook moving Belfast at least in to mid table. Achieving success in job creation could go some way towards meeting an unemployment target.
Employment Rate	Working age employment rate in Belfast of 62.3% compared to NI average of 67%.	The goal for the NI Economic Inactivity Strategy is to achieve an employment rate of over 70% by 2023. Suggested target for Belfast 2020 is to increase employment rate by 2.7% thereby achieving an employment rate of 65% (still below NI average)	Draft NI Economic Inactivity Strategy	The key measurement will be to record particular target groups e.g. people looking after the home or family and long term sick or disabled moving into employment.

Metric	2013 performance	2020 Baseline forecasts	Source	Measuring future success
Skills	Exact middle of rankings of UK cities in 2011 in terms of % of working age population with at least a degree level qualification (26%) though the worst in terms of no formal qualifications (30%)	Key goal for 2020 will be to reduce % of working age population with no qualifications from 30% to 28%. This aligns itself to and will be delivered by key PfG targets.	Labour Force Survey (LFS) data available on Nomis website	Reduce the share of the resident working age population with no formal qualifications and improve the share with NVQ 4 level skills. Evidence shows as individuals acquire more skills they typically have a higher propensity to work and are therefore less likely to be unemployed or inactive. Successful delivery of a skills target should support all other metrics
Jobs in tourism sector	5.9% of total jobs concentrated in accommodation and food services (main broad sector tourism contributor)	6.2% employment share, maintaining its 8 th placed ranking among UK and European comparator cities, by having 5 th fastest jobs growth in the sector	Census of Employment published by DETI	Success could be measured as an improved position on the rank table of comparator cities.

Metric	2013 performance	2020 Baseline forecasts	Source	Measuring future success
Deprivation	In 2005, Belfast was the 2 nd most deprived local government district above Strabane. By 2010 it had become the most deprived	A baseline forecast to tackle deprivation is fundamental to Community Planning and is dependent on inter-agency collaborative objectives across all elements of the Multiple Deprivation Measure (MDM) (income, employment, health, disability, education / skills / training, proximity to services, living environment and crime and disorder).	NISRA	A reduction in the number of wards falling within the top 100 most deprived in NI would represent an improvement in this area, though it should be accompanied by improvements in all wards (not just those most deprived).
Productivity	The average worker in Belfast produced £41,200 of GVA in 2013, the 5 th highest of the 13 UK cities	Relatively weak productivity growth averaging 2.0% per annum (the 4 th lowest) will take the baseline level to £47,431 in 2020 meaning a drop to 6 th place	Oxford Economics	Productivity improvements above the baseline trajectory would represent an improvement. Success in the employment matrix (if based on high value added activity) along with success on the skills target would help achieve this.
GVA growth	Total GVA in Belfast in 2013 amounted to £8.66bn	Average annual growth of 2.6% per annum, the 4 th lowest of the UK cities, is forecast to take this to £10.39bn in 2020 under the baseline	The Blue Book published by ONS	Again GVA levels above the baseline trajectory might represent success. They should happen if employment targets are achieved or partly achieved (assuming productivity does not fall).

Key indicators for monitoring

Theme	Indicator	Data Source
a competitive and internationally connected city	Wage levels	Annual Survey of Hours and Earnings
	Business birth rates & survival rates	ONS Business Demography
	Air transport	DRD – NI Transport Statistics (Belfast), Airport Corporate Websites (comparators)
a learning city developing the knowledge and skills of its people	High level skills	Local Authority Database (Belfast), Annual Population Survey (comparators)
	Resident employment rate	Local Authority Database (Belfast), Annual Population Survey (comparators)
a people centred and inclusive city, actively linking need with economic opportunity	Proportion of HE students not domiciled in NI	Higher Education Statistics Authority
	Lower level skills and educational attainment	NINIS – Neighbourhood Renewal Statistics – Education, Skills and Training
	Labour market	NINIS – Neighbourhood Renewal Statistics – Work Deprivation
	Economic inactivity	NINIS – Neighbourhood Renewal Statistics – Economic Deprivation
a sustainable city with its own distinctive development approach	Population growth in city centre locations	NINIS – Population estimates
	Employment in clean technology	NI Census of Employment
	Proportion of journeys to work by public transport	DRD – Travel Survey for Northern Ireland

8 Conclusion

The preparation of an Integrated Economic Strategy for Belfast has been widely welcomed. In particular, there was a welcome for the fact that the IES was commissioned jointly by BCC and Invest NI.

The proposed approach is consistent and complementary to both the Belfast Masterplan and the Northern Ireland Economic Strategy approach. The IES will in the short term be the means by which the Economic Strategy, and its sub-strategies such as the Innovation Strategy, will be implemented in Belfast. The IES has also aligned with the Europe 2020 Strategy which will drive the delivery of European Structural Funds in the 2014 – 2020 period.

The outcome of this consultancy study is this strategic framework. The Action Plan focuses on the creation of a Citywide Economic Partnership in the context of Local Government Reform and statutory responsibility for Community Planning by early 2015 and on the priority projects for the EU Structural Funds deployment in the course of 2014. Once established the Citywide Economic Partnership would develop a new Action Plan to implement the IES on an annual basis.

The proposed Integrated Economic Strategy for Belfast should provide a framework for a jointly-owned and cohesive approach to the development of Belfast, enabling stretching targets to be set for the City's performance but within the overall context of the Programme for Government priorities and of the Northern Ireland Economic Strategy.