

BELFAST CITY CENTRE

Regeneration Strategy and Investment Plan

December 2014



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Executive Summary

The Belfast City Centre Regeneration Strategy and Investment Plan has been developed to provide a framework for change at a critical time for Belfast. Foreign direct investment is bringing new jobs, tourism is on the rise and major public and private developments are transforming the city centre. Perhaps most importantly, Belfast City Council is gaining new powers to shape the city as part of the ongoing reform of Local Government. In this time of significant change it is essential that the Council is equipped with a strong vision to prepare for its new role and greater responsibility. With that new responsibility will come a sense of the urgency with which many of the city centre issues discussed in this report must be addressed.

One overarching imperative drives this Regeneration Strategy. The city centre is the most important place in Northern Ireland. City centres are where investment impact can be maximised, where rates are generated and where momentum can be built to support growth in the surrounding neighbourhoods. All communities in Belfast therefore have a direct interest in an economically thriving centre.

The centre is to a large extent the face of the region to the world, the place on the basis of which people make decisions about where to invest, where to live and where to start a business. The implication of that importance is that Northern Ireland policy and investment must at times be differentially directed to the centre, as this is where it has the greatest likelihood of the greatest return.

The regional centre deserves special treatment because it is special. The centre is the place that represents Northern Ireland's future, a place that can be shared by all. It is a place in common, where everyone from every community, of every age and origin can enjoy life together.

This strategy sets out a roadmap of policies to guide city centre decision making and a series of projects that translate the policies into action. Work is ongoing to develop and implement the most effective delivery structure within the Council to bring the projects to fruition. Extensive meetings and consultations with city stakeholders have contributed to the strategy, culminating in the Future City Conference in June 2014 which tested many of its policies, projects and approaches.

The strategy is grounded in an understanding of Belfast City Centre today – the **Policy Context, Physical Context, Market Context** and **Transport Context**. This context constitutes the starting point for the policies and projects developed.

Eight policies for the city centre provide a vision for the eight areas of intervention considered most essential to Belfast's success. The policies address the universal elements of a thriving city centre as well as challenges and conditions that are unique to Belfast.

Policies:

Increase the employment population – Capitalise on Belfast's competitive advantage of comparatively low costs of space and labour and a well-educated work force. Support the development of new Grade A office space and better connect the existing office provision within the centre so that appropriate space is available for firms looking to locate jobs in the city.

Increase the residential population – Add liveliness and bustle to the city centre at all hours and create a market for retail, restaurants and entertainment by supporting residential development of various types and tenures at key locations.

Manage the retail offer – Address the retail decline of the centre through a targeted and proactive approach to regeneration of retail areas and management of the city centre retail offer.

Maximise the tourism opportunity – Take tourism in Belfast up a level by complementing the existing offer with another big attraction or festival and fostering the general buzz and activity of the centre.

Create the region's learning and innovation centre – Address Belfast's low level of innovation and entrepreneurialism by building on the strength of existing institutions in the centre and providing cheap and flexible space for new businesses.

Create a green, walkable, cyclable centre – Reduce the area of asphalt and increase green space in the city centre through provision of new open spaces, a comprehensive streetscaping programme and development of the Lagan corridor as a recreational spine.

Connect to the city around – Reduce barriers between the city centre and the communities that surround it by connecting to activity in adjacent neighbourhoods, developing two new pedestrian bridges over the River Lagan and reducing road widths, improving pedestrian crossings, streetscaping key corridors and improving the built form relationship at the edge of the centre.

A shared space – Ensure that the city centre is a welcoming and attractive place for everyone in Belfast through the design and programming of space.

To facilitate the implementation of the eight policies for the city centre the strategy identifies a series of projects for each district. The projects are intended to focus Belfast City Council's efforts on discreet initiatives which will help to achieve the policies and create a liveable and economically thriving city.

The projects should not be undertaken in isolation, however. A coordinated and integrated planning approach is required. Five Special Action Areas are identified as parts of the centre where more intensive local plans should be prepared, either to maximise the beneficial effects of major new institutional and transport developments or to initiate the comprehensive regeneration of declining retail areas.

Special Action Areas:

Northern Quarter – The relocation of the University of Ulster will be transformative to the northern part of the city centre and a comprehensive planning process is already underway to maximise benefits to the surrounding area.

Western Quarter – A coordinated programme of improvement is required to revitalise the Castle Street / CastleCourt / Smithfield Market area as a vibrant shopping district.


North East Quarter Including Royal Exchange – A plan for the regeneration of the largely vacant Royal Exchange block through the introduction of anchor developments and smaller supporting uses is essential for the reconnection of the retail axis of the city centre.

Transport Hub – The development of a new transport hub around Great Victoria Street Station is a major city building opportunity and a strategic approach is required to ensure it supports wider city ambitions.

Oxford Street and the Eastern Bank District – Reuniting the centre with the River Lagan requires a major reimagining of Oxford Street as a waterfront boulevard rather than a busy arterial. To ensure a comparable level of quality in the public realm on the eastern bank of the river, the design of the river frontage in Queen's Quay also requires careful attention.

1

Introduction



The success of Belfast's city centre is central to the future of the city and of Northern Ireland. It is the location of new economic growth, at the core of Northern Ireland's image to the rest of the world, a place that has something to offer everyone. It is the factory, the advertisement and the meeting place of the region's future.

Belfast has done well in recent decades to improve an economically dynamic and attractive city centre. It has however some way to go in comparison to other European cities of comparable size. It needs more; more people working and living in the centre, more visitors, more attractions, more commerce, more jobs, more street life and nightlife, more trees, more in-migrants and more development. More serenity, more bustle, more buzz. It is the combination of all those elements that makes a great city centre, that provides the self-fueling chemistry for regeneration. Belfast has particular challenges; an economy that has been growing slowly, perceived geographical isolation and a legacy of conflict. But it also has a distinctive culture, a special sense of place and a talented population that can help it achieve its own unique brand of city centre success.

One overarching imperative drives this Regeneration Strategy. The city centre is the most important place in Northern Ireland. Experience from across the world shows the importance of thriving, productive, attractive

and prosperous cities for their wider regions. City centres are where investment impact can be maximised, where rates are generated and where momentum can be built to support growth in the surrounding neighbourhoods. A city centre which is attractive, safe, with high levels of employment and investment can provide the basis for a prosperous and successful city and surrounding region. All communities in Belfast therefore have a direct interest in an economically thriving centre. Higher level decision makers across Europe and the UK are increasingly recognising this, and it is time that Northern Ireland decision makers did so as well.

The centre is to a large extent the international face of the region, the place on the basis of which people make decisions about where to invest, where to live and where to start a business. It is the place that conveys confidence and competence to the world. The implication of that importance is that Northern Ireland policy and investment must at times be differentially directed to the centre, as this is where it has the greatest likelihood of the greatest return.

Many other UK cities have come, often after contentious debate, to this understanding. Manchester's centre is now called the 'regional centre' in the planning and regeneration strategies of that conurbation. The centres of Birmingham and Leeds receive similar recognition.

The regional centre deserves special treatment because it is special. Planning and investment policies at the NI Government level should recognise this status and continue to assist Belfast City Council in discharging its responsibility to create a thriving and prosperous city centre that will benefit everyone in Northern Ireland. The centre is the place that represents Northern Ireland's future, a place that can be shared by all. It is a place in common, where everyone from every community, of every age and origin can enjoy life together.

From the mid 1990s to 2007 Northern Ireland, including Belfast, experienced one of its most economically prosperous and politically stable periods in recent memory. The following period of wider global economic downturn saw a fall in employment, a huge reduction in private sector investment, a collapse in the housing market and continued high levels of deprivation across many of the city's neighbourhoods.

However, Belfast is now emerging from the recession and things are improving. Recent years have seen indications of an upturn in the economy, jobs are being created across the city and investor confidence is growing. Belfast has emerged with enhanced economic, political and cultural functions and there is a growing concentration of intellectual resources in universities and research institutions that will help reinforce Belfast's role as the economic driver of the region. With the appropriate support and investment aligned to the right policies Belfast can be even more competitive.

Belfast City Council's role as civic leader and driving force for the city will be consolidated and enhanced with the transfer of the key place-shaping powers of Planning and Regeneration, as well as the new powers of Well Being and Community Planning which have been developed as part of the ongoing reform of Local Government. In this time of significant change it is essential that the City Council is equipped with a vision and a framework to prepare for these new powers and greater responsibility. This is the moment to set in motion the transformation of Belfast City Centre, and there is a sense of urgency about getting it underway.

This Regeneration Strategy and Investment Plan for Belfast City Centre sets out a roadmap of policies to guide city centre decision making and projects that translate the policies into action. Extensive meetings and consultations with city stakeholders have contributed to the strategy, culminating in the Future City Conference in June 2014 which tested many of its policies, projects and approaches.

The time horizon for delivery of the Regeneration Strategy and Investment Plan is roughly 10-15 years. A table in the appendix identifies the level of priority and timeline for each project as well as key stakeholders that the Council must continue to work with to bring this strategy to fruition. Work is ongoing to develop and implement the most effective delivery structure within the Council to realise the projects in the strategy.

In the coming years the new Council will be responsible for developing plans for the entire city area, some of which will be entirely new such as the Community Plan and some that will succeed those plans which exist today. As the city centre is a key location for investment and employment, the Belfast City Centre Regeneration Strategy and Investment Plan has been undertaken first as an initial step in planning for the entire city. In the months ahead, as the new Council is established with its extended remit for shaping Belfast through its regeneration and planning functions, attention will turn to creating strategic plans for both the city as a whole and areas within it. These will focus on improving quality of life for people across the city and ensuring that the growth agenda, at the heart of the city centre framework, is one that can be shared by people across the new council area. Like the city centre strategy they will require a collaborative partnership approach, and they will be driven by a strong focus on outcomes for local people.

At a city-wide level, it is also the Council's intention to produce a number of supporting strategic documents, aimed at addressing some of the broader economic and social outcomes that require attention, for example, an Integrated Economic Strategy, Tourism Strategy, Employability and Skills Strategy and an Active Travel Strategy. These are being developed with the city's communities and other stakeholders to identify their priorities for Belfast and their local areas.

2

Context

2.1. Policy Context

The Regeneration Plan and Investment Strategy fits within a constellation of existing policy documents that apply to Belfast and its city centre. It aligns with the key aims of these documents and provides an interpretation of how Belfast City Centre should develop in the coming years to help achieve those aims. In some instances there are variations in detail with existing area based plans, reflecting a refreshed approach that takes account of the improving economic context and housing market and increasing investor confidence in Belfast City Centre, as well as significant new initiatives that have emerged since the policies and plans were created.

The **Programme for Government** and the **Regional Development Strategy (RDS)** and **A New Approach to Regional Transportation** provide the entire region with a vision, with realistic goals and ambitious targets in relation to investment, development and transportation. The Programme for Government has five priorities for the Government to focus on up to the year 2015. They include Growing a Sustainable Economy and Investing in the Future; Creating Opportunities, Tackling Disadvantage and Improving Health and Well-Being; Protecting Our People, the Environment and Creating Safer Communities; Building a Strong and Shared Community; and Delivering High Quality and Efficient Public Services.

In addition to the aim of strengthening Belfast as the regional economic driver, the Spatial Framework Guidance in the RDS includes "Growing the population of the city of Belfast" and "Enhance the role of Belfast City Centre as the regional capital and focus of administration, commerce, specialised services and cultural amenities". The RDS identifies the need to support and strengthen the distinctive role of Belfast City Centre as the primary retail location in Northern Ireland; enhance the employment potential of the city centre; close the gap in quality of life for those living in deprived areas; and develop Belfast as Northern Ireland's cultural and arts centre.

At a local level there are already a number of plans and policies for the city, many of which encompass parts of the city centre, developed by Central Government departments including the Department of the Environment and the Department for Social Development. However, none of the plans provide a holistic and focused approach to the city centre. The regeneration strategy is intended to fill that void by providing an up to date vision that bridges the gaps in existing policies and plans and supports their delivery.

The **Belfast Metropolitan Area Plan 2015** provides the land use context to planning for the wider city region and its recent adoption helps provide greater certainty. Whilst many of the policies remain valid, some parts of BMAP have naturally become outdated due to the length of time passed since inception.

The DSD publications **People and Place** and **Belfast City Centre Regeneration Policy Statement** establish regeneration objectives for the city centre which are very much aligned with the regeneration strategy. The objectives for the city centre include: enhancing its role; promoting its physical renewal; creating a high quality and safe urban environment which is attractive to investors, employees, residents and tourists; and creating a sustainable and vibrant city centre which supports a quality lifestyle attractive to inward investors and potential future residents, amongst other objectives.

2.2. Physical Context

This strategy takes a larger view of what constitutes Belfast City Centre than has typically been used. A city centre is partly defined by its functions, and in Belfast today city centre functions take place not only in the traditional core inside the bounds of the River Lagan, Westlink and M3, but also in City Quays and Titanic Quarter. In the future Queen's Quay and Sirocco must be drawn into the centre as well through better physical connectivity. These areas should not be seen as competing with the traditional city centre but as having their own unique and complementary role in an expanded city centre context.

Four structuring areas within this larger definition of the city centre have been defined for the purposes of this strategy – the South Centre, the Core, the North Centre and the Lagan Corridor. Roughly, the South Centre includes everything south of City Hall, the Core includes City Hall and the retail core, the North Centre includes the University of Ulster's York Street campus, the Cathedral Quarter and everything north of Frederick Street and the Lagan Corridor encompasses everything along the river, including the new and future development areas.

No geography perfectly captures the diversity and function of a city like Belfast, and five "Special Action Areas" have also been defined, that overlap these structuring areas, to give more detailed guidance on proposed short term implementation priorities. These are elaborated in Section 4.6.



Vacant heritage building (Flickr / William Murphy)



The South Centre

Belfast City Hall acts as a natural focal point in the city centre, the point from which everything else is measured. To its south lies the traditional office core, heavily occupied by the public sector but with a large private sector presence as well. Whilst the traditional office core is reasonably healthy, the number of premises to let is concerning and the quality of the office stock is deteriorating. The lack of the type of Grade A office space desired by incoming firms is a major weakness. There are some restaurants and cafes on the ground level to serve local office workers, but little in the way of open spaces for their use and enjoyment.

The built form in the area is a mixture of solid heritage buildings and infill development of varying architectural and physical quality, suggesting an opportunity for selected demolitions to reduce redundant stock. There are a number of sites currently occupied by surface car parks or low value buildings that are excellent candidates for new Grade A office development. The office core comes to an abrupt end at Ormeau Avenue, as the surface car parks along the unfinished South Link of the Inner Ring Road create an undefined edge.

Great Victoria Street Station, set to be transformed by Translink into an integrated Transport Hub, is hidden behind the Europa Hotel and Great Northern Mall, with no presence on Great Victoria Street at all. Bringing the entrance to the street will be crucial as the Transport Hub essentially becomes the gateway to the city centre and its immediate vicinity becomes a key area for investment and development and connections to the key city institution of Queen's University Belfast and its wider campus.



Great Victoria Street (Flickr / William Murphy)



View looking north on Great Victoria Street (Flickr / William Murphy)



Belfast's South Centre (Belfast City Council)



Blackstaff Square (Urban Strategies Inc.)



Linenhall Street (Urban Strategies Inc.)



Great Northern Mall / Street entrance to Great Victoria Street Station (Urban Strategies Inc.)

The Core

In the city's retail core north of City Hall the high-quality streetscape improvements implemented as part of the Streets Ahead initiative create a general impression of a well-cared for district. However, Donegall Place and Royal Avenue have suffered from a decline in footfall and retail quality in recent years. The development of Victoria Square has been successful in adding a modern retail environment in the city centre; its public realm and built form quality are evident. On the west side, however, the CastleCourt Shopping Centre needs refreshing and is cut off from Victoria Square and what should be a strong retail axis by the uncertainty over the vacant Royal Exchange block. The high level of vacancy along Castle Street and neighbouring retail areas suggests the need for a coordinated set of retail enhancement, destination activity and public space improvements.

Belfast's rich legacy of heritage architecture is most evident in the Core, though impressive heritage buildings can be found throughout the city centre. The iconic City Hall is the most recognisable landmark, an asset that is somewhat underutilised at this point. Many significant heritage buildings lie completely vacant, while other heritage stock has vacancies on upper levels. Belfast's heritage fabric is an essential ingredient of its unique character and charm, therefore a strategy for adaptive re-use is required to ensure its preservation. In this regard, the regeneration of the Royal Exchange block must be an early priority.



Belfast City Hall view (Belfast City Council)



Castle Street (Urban Strategies Inc.)



Belfast Christmas Market (Belfast City Council)



Bank Square undergoing improvements (Urban Strategies Inc.)



Victoria Square (Belfast City Council)



Belfast City Hall green space (Urban Strategies Inc.)



Donegall Place (Belfast City Council)



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Donegall Place vacancies (Urban Strategies Inc.)



Hill Street, Cathedral Quarter (Urban Strategies Inc.)



University of Ulster York Street campus, artist's impression (Belfast City Council)



Commercial Court, Cathedral Quarter (Flickr / Woody Hanson)



Under the M3 by Donegall Quay (Urban Strategies Inc.)



Buoys Park (Urban Strategies Inc.)

The North Centre

The northern part of the city centre is the most poorly defined in terms of both land use and built form. Numerous vacant sites, surface car parks and cheap one-to-two storey commercial and industrial buildings contribute to a lack of character and direction for the area. However, the University of Ulster's new York Street campus will anchor the north end, with the thousands of students, faculty and staff bringing energy and vitality that will be transformative to the area. The emerging Northside development has the opportunity to maximise the potential of the university by accommodating and encouraging innovative new start-ups in close proximity and redeveloping vacant and underutilised sites. Though the north centre is blessed with two of the few public open spaces in the city centre - Writer's Square and Buoys Park - they are disappointing in their landscape treatment and activity. Proposals for "Library Square" and "Cathedral Gardens" as part of Streets Ahead 3 will add greatly to the open space provision in the north centre.

The historic Cathedral Quarter has developed into a vibrant area characterised by arts and culture organisations, bars, restaurants, and with upscale residential at St. Anne's Square. Its momentum firmly established, the Cathedral Quarter simply requires encouragement and support to continue along its current trajectory.

The northern edge of the city centre is the least permeable, defined by the major highway infrastructure of the Westlink and M3. There is a danger that with the construction of the York Street Interchange the barrier between the city centre and the communities to the north will become even more pronounced. Innovative and interesting ways must be found to penetrate this barrier and foster connections through the concrete of the interchange.



St. Anne's Square (Belfast City Centre Management)



The MAC (Flickr / Joseph Magowan)

The Lagan Corridor

The River Lagan is underplayed in the city centre. It is a largely negative space at the edge of the traditional core, lacking in the drama and celebration that other cities bestow on their waterfronts. The bridges are utilitarian rather than iconic, and there are not enough of them. Recent investment in quality public spaces such as Donegall Quay is a step in the right direction, but the river remains too hard and too serious, with not enough green or playfulness. There is nowhere for patrons of St. George's Market to sit and eat their breakfast and watch their children play on a Sunday morning, and nowhere for office workers at Lanyon Place or delegates at Waterfront Hall to chat over lunch. Whilst there are sections of a riverfront promenade, they are not connected into a continuous network where a 5k charity run could be held. The recreational possibilities of the water itself are ignored; in this lower section of the river there is a complete absence of water activity. Overall, the river's enormous potential as a recreational and public space asset for the centre remains unrealised.

It is all the more important that the River Lagan receives proper treatment because it is no longer the edge of the city centre. Significant development has taken place in Titanic Quarter over the past 10 years, including the introduction of Belfast's biggest tourist attraction, Titanic Belfast, as well as hotels, apartments, Titanic Studios, Belfast Metropolitan College's Titanic Quarter Campus and the Northern Ireland Science Park. This has resulted in Titanic Quarter playing a significant employment, tourism and accommodation role in the City. Titanic Quarter is also a key site for Grade A office space. The Harbour has increasingly become a popular docking point for cruise liners bringing tourists into the city and there are plans in place to expand the capacity of this gateway into Belfast and the region. As Titanic Quarter continues to evolve and diversify its offer, and as Queen's Quay, Odyssey Quay and Sirocco begin to develop, drawing them into the city centre through improved connections will be essential.



River Lagan (Belfast City Council)



Titanic Quarter (Flickr / Miss Copenhagen)



Donegal Quay - Obel Tower (Belfast City Council)



Lagan Corridor pathway (Urban Strategies Inc.)



Lanyon Place (Belfast City Council)

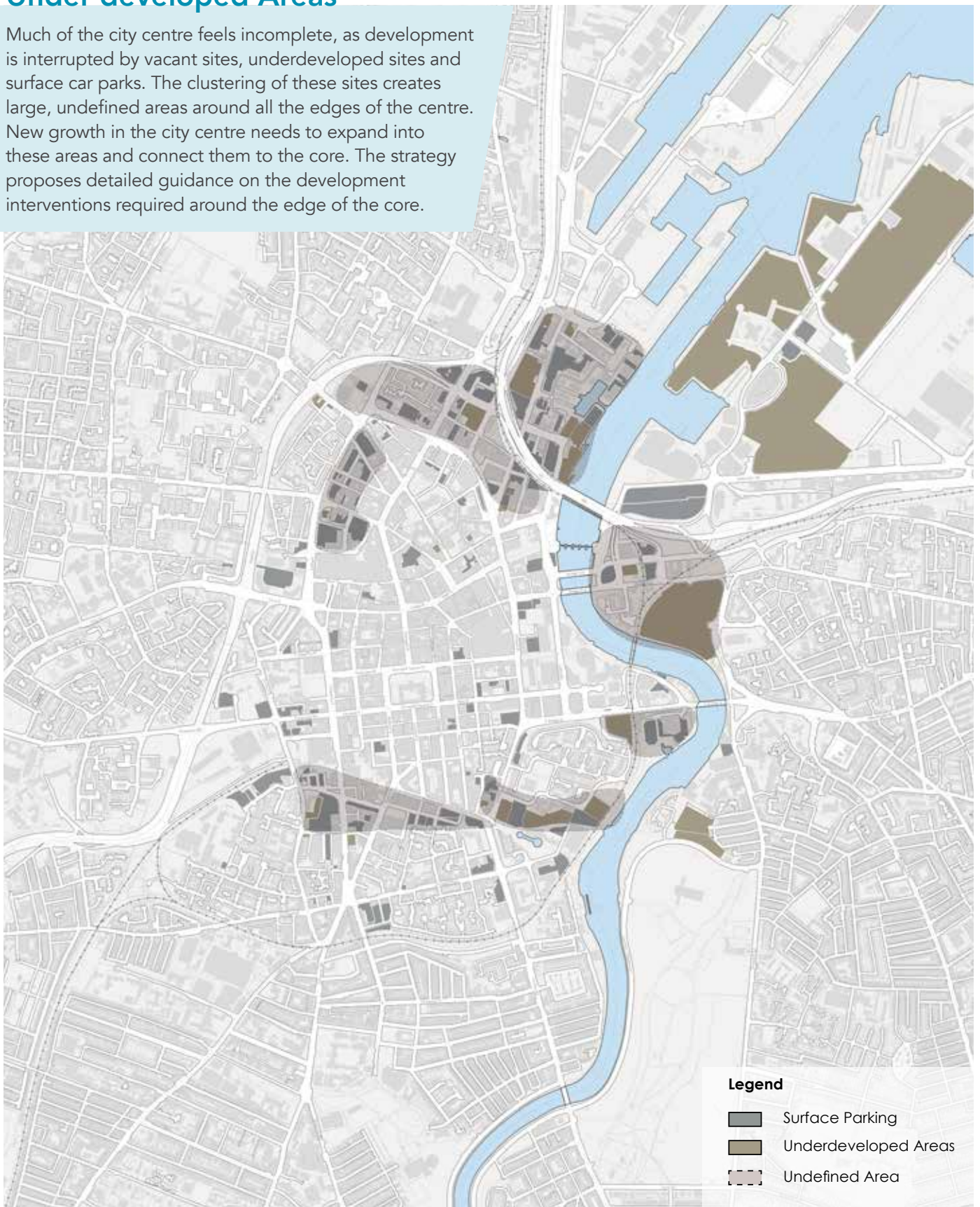


St. George's Market (Belfast City Council)

City Centre Structure

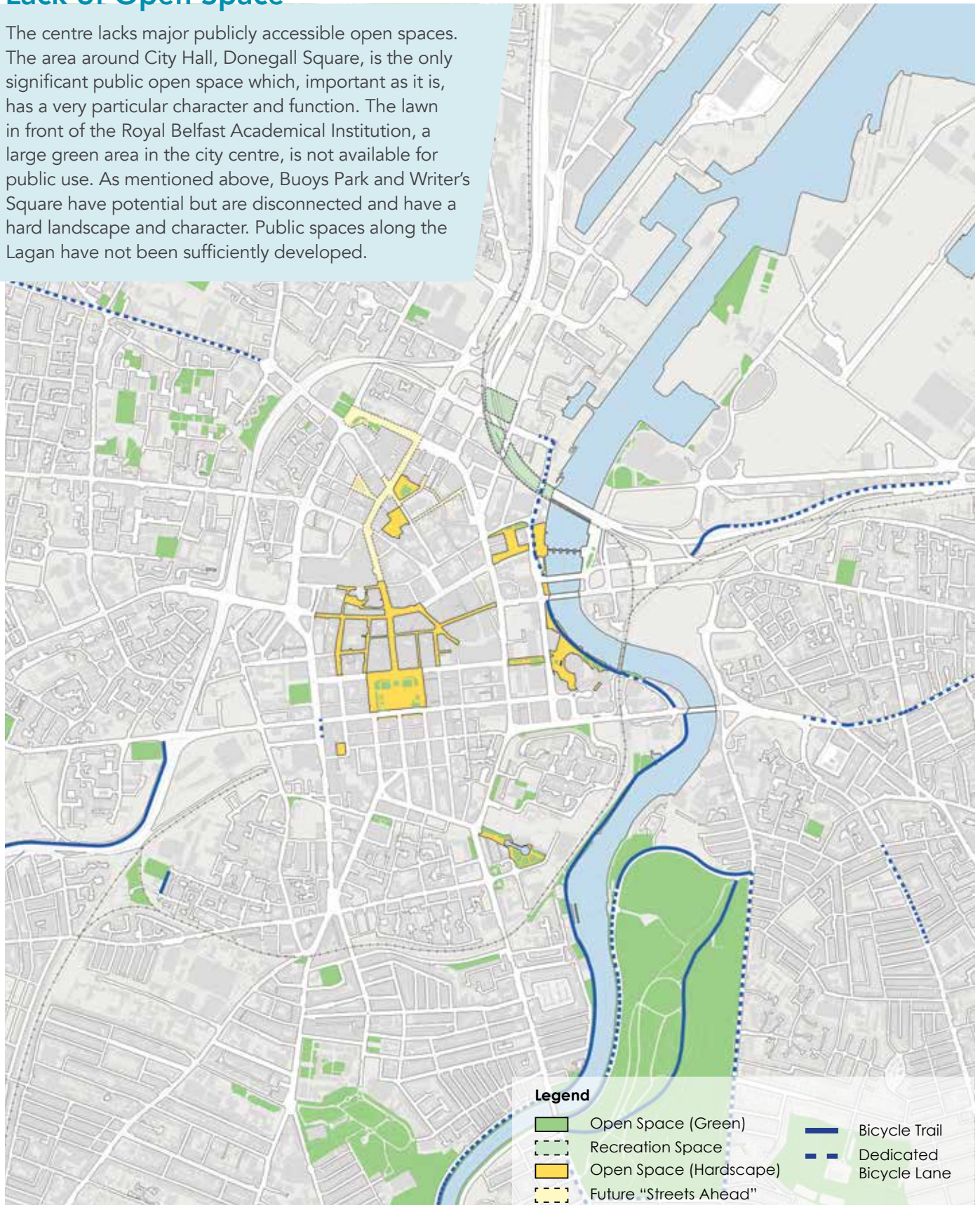
Under-developed Areas

Much of the city centre feels incomplete, as development is interrupted by vacant sites, underdeveloped sites and surface car parks. The clustering of these sites creates large, undefined areas around all the edges of the centre. New growth in the city centre needs to expand into these areas and connect them to the core. The strategy proposes detailed guidance on the development interventions required around the edge of the core.



Lack of Open Space

The centre lacks major publicly accessible open spaces. The area around City Hall, Donegall Square, is the only significant public open space which, important as it is, has a very particular character and function. The lawn in front of the Royal Belfast Academical Institution, a large green area in the city centre, is not available for public use. As mentioned above, Buoy's Park and Writer's Square have potential but are disconnected and have a hard landscape and character. Public spaces along the Lagan have not been sufficiently developed.



Poor Connections

None of the city centre's component parts are geographically very distant from each other, but they often feel separated due to poor physical connections. Likewise the neighbourhoods surrounding the city centre – Carrick Hill, Sandy Row, Donegall Pass, The Markets, Shankill, Divis and others – are cut off from the centre by hard physical barriers, creating perceptual as well as physical boundaries. City Quays, a key location for much needed Grade A office development in the short term, is separated from the core by the M3. The M3, Westlink, rail lines and River Lagan all play a defining and dividing role.

Major arterials within the city centre also create barriers. The scale and width of roads is too great, the quantum of asphalt is too high, as is the ratio of asphalt to green. Whilst the Streets Ahead programme has transformed the quality of the public realm in Belfast's retail core, there is too little urban greenery. The Inner Ring Road's unfriendly pedestrian character divides the centre into inner and outer zones. The north end, in reality only a few minutes from City Hall, feels very disconnected. Oxford Street, with its five lanes of traffic, cuts the core off from the River Lagan. A primary objective of the Regeneration Strategy and Investment Plan must be to reconnect the city centre both within and without.



The M3 (Belfast City Council)



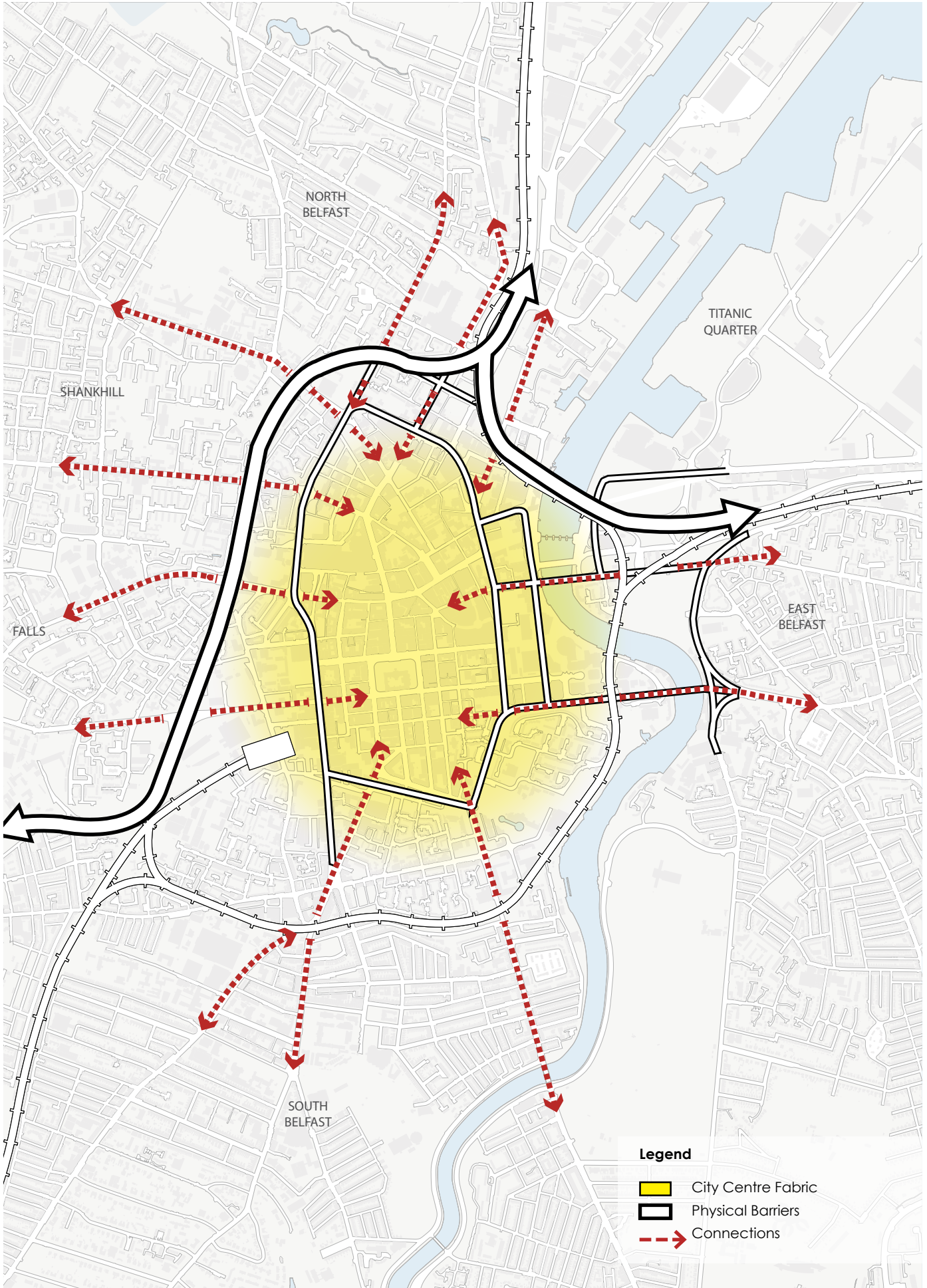
M3 underpass (Urban Strategies Inc.)



York Street, approaching the junction with the Westlink (Urban Strategies Inc.)



Donegall Quay view south under the M3 (Urban Strategies Inc.)



2.3. Market Context

Belfast and indeed the rest of Northern Ireland have a very clear focus on economic development. This is in part a response to a damaging recession and to a longer term goal of re-balancing a regional economy that had become heavily reliant on the public sector, not least during years of conflict. This strategic context mirrors that enacted by the Programme for Government 2011-2015 which has the creation of a vibrant economy as its number one priority.

Notably, given public spending austerity, the private sector has largely driven the recovery in Great Britain. It is unsurprising then that Northern Ireland is not recovering as quickly as other regions. This imbalance needs to be addressed and it is with an understanding of the underlying property market conditions illustrated within this section that the policies and projects for the city centre have been conceived and developed.

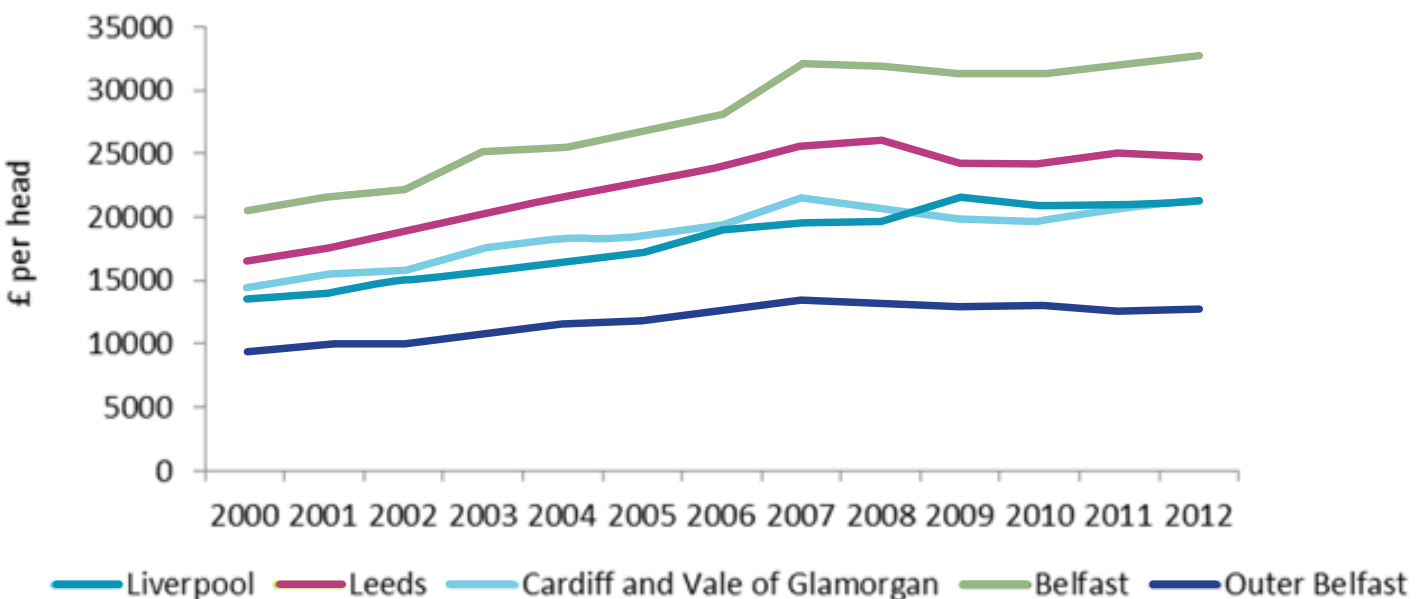
Employment Sectors

Almost 200,000 employee jobs in Belfast comprise 29% of the total jobs across Northern Ireland,¹ a figure which highlights the economic importance of the city centre to the wider region. However, economic inactivity in 2013 in Belfast (30.9%), was higher than the Northern Ireland average (27.6%) and the UK average (21.9%).²

Typically for a regional capital, there is a significant association with public administration. Other notable sectors which are concentrated in Belfast City Centre include: administrative and support services; education, financial and insurance activities; health, information and communication; and professional, scientific and technical activities. The creative industries is one of Belfast's fastest growing sectors with over 1,000 creative businesses based in the city, employing over 17,000 people.³

When considering the combined productivity across these sectors, it is apparent Belfast has experienced growth in Gross Value Added (GVA) per head in the last decade.

Workplace based GVA per head at current basic prices



Source: ONS

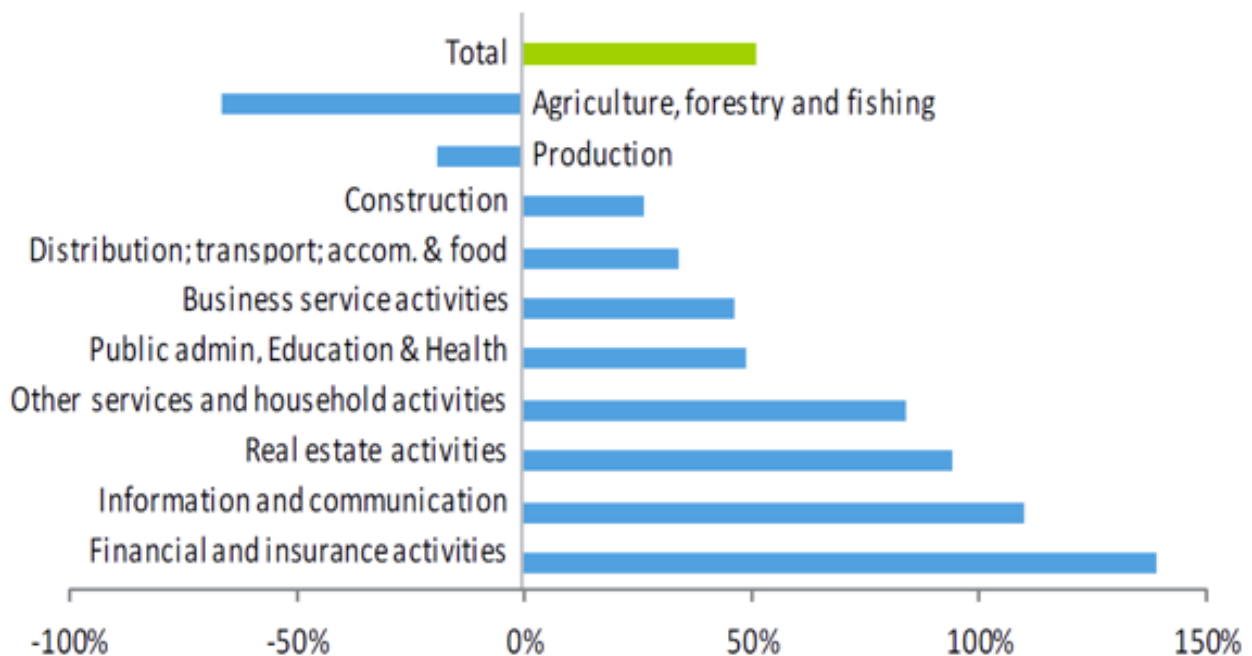
¹ DETI, Census of Employment

² Deloitte, Economic and Property Market Working Paper, Belfast City Centre Regeneration Strategy and Investment Plan

³ Belfast City Council, Belfast City Council Facts and Figures

In terms of sector specific GVA growth, Belfast has been most pronounced in financial and insurance services and information and communications, both of which have seen GVA growth of over 100% since 2001.

Belfast workplace based GVA growth between 2001 and 2011 by industry at current basic prices



Part of the growth in these sectors is linked to Belfast's success in attracting Foreign Direct Investment (FDI). Belfast sits 4th out of 28 UK cities based on number of projects and 3rd out of 28 based on number of jobs created between 2009 and 2011. Notably the list of investors in the city includes international brands such as CitiBank, HBO (Game of Thrones), Fujitsu, Liberty IT, Bombardier and New York Stock Exchange all of whom have established substantial bases in Belfast.

In contrast, Belfast benchmarks poorly in terms of entrepreneurship, using the indicator of business start-up rate. In order to promote the health of a city's economy the dynamism of businesses and entrepreneurs is vital. In this regard Belfast appears to be bottom of the pile; based on business start-ups per 10,000 population, Belfast was ranked 64 out of 64 cities in the UK.⁴

⁴ Centre for Cities, Cities Outlook 2014

Office market characteristics

Geographically, the core office district within Belfast is dispersed around City Hall. To the south and south east of City Hall there is a focus on Alfred Street, Adelaide Street, Linenhall Street and Bedford Street and to the east of City Hall around Chichester Street and May Street. There has also traditionally been a strong office presence on Great Victoria Street. Over the last decade office development has extended towards the waterfront with significant development taking place around Waterfront Hall. There are three significant areas of office development on the edges of the city centre, at the Gasworks, City Quays and most recently in the Titanic Quarter. These edge-of-centre schemes have secured some significant tenants, particularly from the financial services and technology sectors, but despite the promising commercial sector growth, the majority of the anchor tenants remain public sector occupiers.



The Titanic Quarter, which is master planned to ultimately deliver 180,000 sq m of business/ office/ R&D floor space, has extended the focus across the Lagan. The Titanic Quarter provides a deliverable and affordable option for occupiers and has been successful in attracting private sector companies such as Citi Group, Kana, Fidessa, Consilium Technologies and Ciena.

The Belfast office market has become increasingly polarised. There is significant over-supply of secondary office accommodation, with agents estimating the quantum of vacant office space at approximately 1.2 million sq ft (Q2, 2013). However, Grade A office space is undersupplied, indeed there is virtually no Grade A space available or indeed in the immediate pipeline. This is a major issue that must be a primary focus of the regeneration strategy.

One of the challenges for this sector relates to low prime rental levels and lack of funding which make new schemes unviable. Despite this there is over 2.5 million sq ft of office with planning permission and local market sentiment is improving in regard to the potential for any further speculative office development.⁵ A number of occupier lettings moving through the market in 2014 could shift rental levels up from £12.50 per sq ft, where they have been throughout 2012 and 2013. This figure does not support speculative development however and therefore there will continue to be viability issues that will need to be addressed if supply is to improve.

The public sector is, as mentioned, a very significant employer in Northern Ireland and Belfast. The continuing changes in administration coupled with a need to drive efficiencies in the public sector will likely create opportunities in the office market. These will however lead to some consolidation and an overall reduction in the occupied footprint of the public sector.

Target: At least 1.5m sq ft of net new office floorspace over the next 15 years,⁶ with up to four times as much space moving through the refurbishment market. This is based on analysis suggesting that Belfast has the potential to deliver an average of 100,000 sq ft per annum of net new office floorspace and average take-up rates of 500,000 sq ft per annum.

⁵ IPD/University of Ulster Northern Ireland Commercial Property Report. December 2012.

⁶ Based on analysis of comparator cities including Cardiff, Edinburgh, Newcastle and Leeds over the past 12 year timeframe.

Retail

Belfast City Centre has supported a significant amount of new retail development over the last decade. There has been considerable success, for example in Victoria Square and the Cathedral Quarter. That success has, when coupled with the economic downturn, increased the vulnerability of other parts of the city centre, notably Donegall Place and the CastleCourt Shopping Centre. The focus of city centre retailing has shifted from its historic location on Donegall Place, Royal Avenue and Castle Street / Castle Place to the covered shopping centres of CastleCourt and Victoria Square.

There are several market characteristics which can be assessed to analyse the health of the retail sector. Belfast's retail market faces a number of challenges which need to be understood and recognised in the strategy.

Catchment – The Belfast catchment population is one of the least affluent of the UK's retail catchments, ranking 174th in 2011⁷. While this presents a major challenge moving forward there is a growing opportunity to capture the spending power of Belfast's 108,000 daily commuters into the city centre.

Vacancy rates – These by far exceed the UK averages. Reasons that have been cited for this include retailers falling into administration and retailers being more selective and requiring less space. The high level of business rates in prime locations is also causing a significant threat to a number of existing occupiers, a situation which will only serve to further increase vacancy rates in the future. Vacancy is however concentrated, rather than dispersed and could potentially be tackled on a coordinated basis.

Vacancy rates

| | Belfast Count | Belfast % | UK % |
|---------------------------|---------------|-----------|-------|
| Vacant outlets | 202 | 20.63 | 12.60 |
| Vacant floorspace (sq ft) | 380,600 | 15.64 | 10.69 |

Source: Experian, 2014

⁷ UK Property Market Information Service (PROMIS), 2011

⁸ British Retail Consortium, BRC/Springboard Footfall and Vacancies Monitor

Tenant mix – The success of any retail destination is dependent on the cross-section of tenants within that location. It is important that Belfast's city centre retail offer is unique, in order to differentiate it from other destinations in the Belfast region and Northern Ireland.

Independent retail has an important role to play, as it contributes to this unique retail offer. A significant proportion (43%) of the retail in Belfast City Centre is made up of independent retail,⁸ however in recent years this type of retail has to some degree migrated away from the city centre to some of the arterial routes, most notably Lisburn Road.

Given Belfast's regional role, there is potential to attract a greater number of retailers - for example, large multi-national retailers and/or department stores. Such retailers are important because they anchor a retail district, drawing clientele who then also patronise other stores in the area. John Lewis has had a significant positive impact on other city centres such as Cardiff and Liverpool and an anchor such as this has been commonly cited as the missing piece in the jigsaw.

Target: Reduced vacancy rate, enhanced tenant mix and renewal of redundant space with new quality provision. There will not be significant net growth in retail floorspace over the strategy timeframe, with the exception of the Northeast Quarter including Royal Exchange.

Leisure, tourism and culture

Belfast's unique history, improved hotel offering and proximity to attractions such as the Giant's Causeway have helped to distinguish it from other cities and enabled it to become a global tourist destination. Tourism to Belfast has more than quadrupled over the period 2000 to 2013, with 7.5 million visitor trips in 2013 and a £438 million spend.⁹ The city has now established itself as a leading short-break destination.

Whilst tourism indicators show a positive trajectory in terms of visitor numbers and spend, great untapped potential remains. The remarkably successful Titanic Belfast, which has seen visitation of almost 2,000,000 since opening less than three years ago,¹⁰ presents a reason to visit Belfast, but the city centre lacks additional significant visitor attractions to secure weekend visitors and encourage further dwell time in the city – nearly half of the visitors to Titanic Belfast do not do anything else in the city.

The hotel sector is performing very well, with occupancy rates across all sub sectors currently over 75%.¹¹ Effectively this means that hotels are fully booked at peak times. Demand is increasing with rising overnight visitor numbers. This is due to further increase when the Waterfront Hall expansion is completed. Three new hotels are likely to come on stream in the foreseeable future at Titanic Quarter, City Quays and in Great Victoria Street and even when these are taken into account projected demand would suggest a requirement for a further 1,000 rooms between 2015 and 2020. The requirement will primarily be in the 4 and 5 star sector.¹¹

Target: Double the value of tourism over the next five years. From a base of £438m in 2013, this would result in a tourism spend of £870m in 2020.⁹

⁹ Integrated Tourism Strategy.

¹⁰ Data provided by Titanic Belfast

¹¹ ASM Hotel Capacity Study 2014



Titanic Belfast (Belfast City Council)



Belfast 2011 MTV EMA (Belfast City Council)



Made in Belfast restaurant (Flickr / Robert Young)

Residential

The conflict in Northern Ireland means that Belfast's centre has experienced a history distinct from other UK cities, which has had a fundamental bearing on how the city centre has developed and changed in the last 50 years. City centre living may be one of these divergences; however there is evidence that there is an increasing residential population in Belfast's city centre communities such as Carrick Hill or Donegall Pass.

In recent years, there have been a number of high profile schemes completed within the city centre which have helped reposition the centre as a desirable place to live and demonstrate the city's potential for high quality urban living. New developments around Laganside and within Titanic Quarter have helped bring activity to these declining areas. Further residential development at Titanic Quarter will continue to attract people to this area on the edge of the city centre and will help reinforce its important role for the city. There have also been a number of schemes within the city centre core, most notably at Victoria Square, St Anne's Square and within Belfast 'Westside'.

Despite this, city centre living has not quite achieved the same level of sustainability as in other comparable cities, and has experienced a larger downturn following the economic crisis. There is a perception that for a capital city, Belfast has not been able to attract the city centre residential community that a city of its stature should hold.

As a consequence of the under-developed city centre residential market there are relatively few properties for sale in the city centre. In April 2014, there were only 37 properties available on the main estate agency website¹² for Belfast City Centre. This compares with 467 available for Edinburgh city centre and 340 for Cardiff city centre¹³.

Likewise, for the private rented sector there is also a lack of available housing stock. In terms of availability of property for rent in the city centre, in April 2014, there were only 87 properties available on the main estate agency website¹² for Belfast City Centre. This compares with 890 available for Manchester city centre and 691 for Liverpool city centre¹³.

Target: At least 6,000 new homes over a 15 year period. This assumes that the residential market in Belfast has the potential to deliver at least 400 units a year,¹⁴ and indeed given the potential for changes to lifestyle, economic growth and culture there is no reason to think that this figure could not be exceeded.

¹² www.propertynews.com (accessed April 2014)

¹³ www.rightmove.co.uk (accessed April 2014)

¹⁴ Based on analysis of comparator cities including Cardiff, Edinburgh, Newcastle and Leeds over the past 12 year timeframe. This does not include student beds.



Riverfront residential development (Belfast City Council)

2.4. Transport context

Transport and connectivity will play a vital role in the economic growth and regeneration of Belfast by enhancing access for the life-blood of the city centre – its people. It is the movement, connectivity and transport of people that will serve as one of the key elements to catalyse growth and support Belfast as a successful modern city.

Belfast currently has a clearly defined concentric urban form, with few people living within the core area. Beyond the core area there are numerous higher density residential zones which typically connect to the city centre via radial routes shared by all forms of transport.

The city centre itself is compact and flat with an accessible and legible grid pattern of local streets meaning that many journeys could be made by walking or cycling. The main retail and employment areas lie within a five minute walk of City Hall but connectivity and routes for these journeys can be disjointed.

Belfast is a city that has historically been dependent on the private car and the streetscape has evolved to cater to these demands, resulting in road infrastructure that is oversized, over complicated and a barrier to non-motorised accessibility.

The historic reliance on the car and consequent imbalance of space allocation in Belfast City Centre has recently been challenged by the Belfast on the Move (BOTM) project. The project reduced general traffic capacity within the Inner Ring Road and reallocated that space to pedestrians, cyclists and public transport. The changes have created a city which is more welcoming on foot, bicycle and public transport and this is evidenced through decreases in the volumes of traffic entering the city and increases in public transport, walking and cycling levels.

City Hall at night (Belfast City Council)





Oxford Street near Waterfront Hall (Urban Strategies Inc.)



Approach from the east - the Queen's Quay 'knot' (Google Earth)

Road Network

Belfast City Centre is served by a comprehensive road network; the basic structure of which is a series of radial routes converging on the Inner Ring Road which encircles the city centre, with the exception of the south where it is incomplete. Several major national motorways (M1, M2, M3) also pass in close proximity to the city centre providing access to it from a number of junctions.

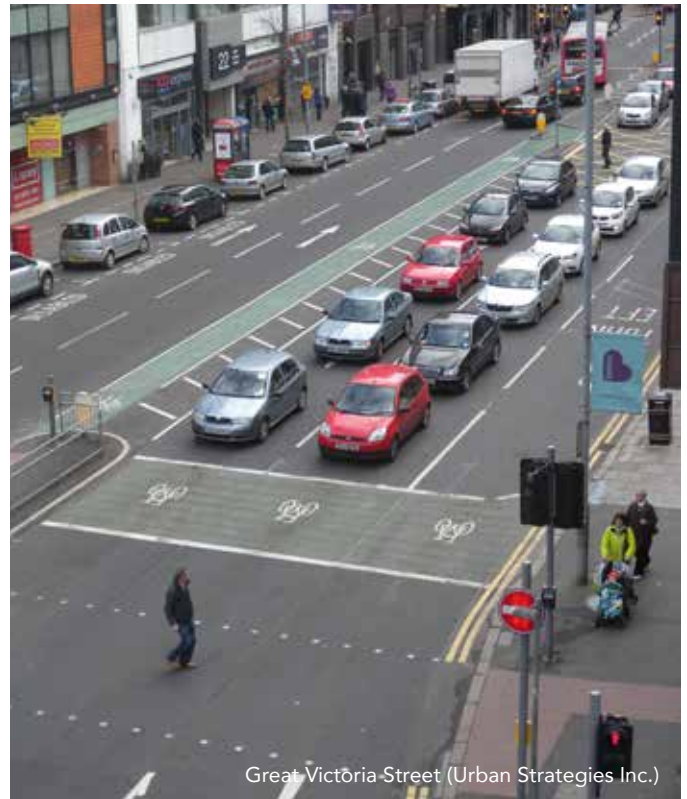
On a number of key 'gateway' approaches to the city centre the road infrastructure presents an impermeable and unnecessary barrier to non-motorised accessibility. This is especially true of the approaches from the north (York Street Interchange) and the east (Queen's Quay) as well as the localised points where urban roads cross strategic roads such as the Westlink.

The city centre acts as a convergence point for the arterial routes leading from the Outer Ring Road (A55) in the suburban area of Belfast. There is an opportunity to simplify and 'untangle' some of the city gateway areas through the removal of unnecessary flyovers and reassignment of some traffic links from one-way to two-way. This rationalisation of sections of highway will be further assisted when the York Street Interchange is complete and strategic through traffic is re-routed away from the city centre environment.

Walking

The grid network of streets and the availability of crossings mean that the compact city centre is relatively easy to walk around. Recently installed pedestrian signage and mapping helps to create a legible area, nearly all of which lies within a 10 minute walk of City Hall. It is only as walking journeys extend to the margins of the city centre – the Inner Ring Road, the River Lagan, the Westlink and corresponding major road junctions – that this accessibility begins to deteriorate. Pedestrians are funneled through pinch points and required to use limited designated crossing points which affect the directness, ambiance and journey times of walking routes. Despite being relatively close to City Hall, emerging development areas such as Titanic Quarter and City Quays feel beyond walking distance due to these barriers.

The primary scope for improving walking lies in ensuring routes are direct and benefit from good quality public realm treatment. At key crossings and pinch points the use of traffic calming and enhanced junctions can improve the pedestrian experience.



Great Victoria Street (Urban Strategies Inc.)



Castle Lane pedestrianisation (Urban Strategies Inc.)

Cycling

Cycling around Belfast is currently more challenging than walking and the routes are less complete. Routes come to an end without warning, require frequent stopping and vary in style, colour and signage. There is the feeling of a network but one that has not been joined up. There are however a number of key routes such as the River Lagan and the Comber Greenway which provide good levels of route continuity and are popular for both utility and leisure cycling journeys.

The potential for cycling is significant. The destinations that can be reached within 15 minutes of City Hall include not just the city centre but also many of the densely populated inner suburbs, employment centres, and the universities and colleges, making cycling the quickest option for a range of daily journeys.

There is the need to complete the network that connects to the city centre – tackling the current discontinuities to create a complete and legible network. Within the city centre there is the scope to reallocate space on key routes and provide a city centre environment where cyclists can move quickly and directly.



Existing cycling conditions (Urban Strategies Inc.)

Connectivity

An important characteristic of the city centre is that it is compact, which should lend favourably to a high level of connectivity. However, there are existing barriers to connectivity that inhibit movement. These barriers are a combination of adjacent highways, the River Lagan and railway lines that intersect the city area. The key to softening the severance created by these barriers is to seek ways to increase their permeability whilst allowing existing movement to be maintained. This can be achieved through the introduction of:

- Super-crossings at high demand locations
- Improvements to a number of junctions along the Inner Ring Road
- Additional cycle ways
- Simplification of the existing road structure
- Additional pedestrian bridges over the River Lagan
- Improvements to existing links to communities across the Westlink and M2 motorway network, such as Peters Hill, Clifton Street, North Queen Street, Divis Street and Grosvenor Road.



Dunbar Link (Urban Strategies Inc.)



Nelson Street looking south under the M3 overpass (Urban Strategies Inc.)

Public Transport

Public Transport in Belfast is provided by 'Metro' local bus services, Goldline regional coach services and the Northern Ireland Railway network. All public transport services are operated by Translink but ticketing and fare structures are not currently integrated between the different modes of transport, meaning that passengers are penalised for making multi-modal journeys.

Mirroring the road network, most 'Metro' bus services are radial, operating on twelve key routes and travelling to either City Hall or Upper Queen Street. The services provide a high frequency of 5-10 minutes on core parts of the network and operate seven days a week with extended operating hours. The Belfast on the Move project has delivered significant road space reallocation for buses which has been reflected in an increase in patronage of 4% between 2010 and 2013, in contrast with many bus networks in UK cities.

Dedicated buses also serve a number of Park and Ride sites on the periphery of the city, providing onward travel to the city centre. These services are well used and enable journeys that are not on core routes to be made by public transport.

Northern Ireland Railways provides a network of stations of which seven lie within the central urban area of Belfast. The primary terminus station serving the city centre is Great Victoria Street. Located to the west of City Hall, this station is within ten minutes' walk of the majority of the city centre and has been earmarked for a significant upgrade.

There is also a new and exciting prospect for public transport – the Belfast Rapid Transit (BRT). This public transport service will be a high frequency service, running along major corridors initially to east and west Belfast, as well as the Titanic Quarter. This new system will run high capacity, high quality vehicles, stopping at dedicated halts approximately every 500 metres. It is anticipated that the priority attributed to this new service will encourage significant modal shift, as well as increasing access for commuters and tourists outside the city area.

The Belfast Rapid Transit (BRT) will be fully functional by 2017, with plans for a potential north-south route to follow, with those services functional by approximately 2021/2022. However, it is recommended that this timeline on the north-south services is accelerated in order to minimise disruption, capitalise on the opportunity and realise the benefits the BRT can bring to the city. A complete BRT network, integrated into a galvanised public transport system would not only reduce car use in the city centre but would also connect the surrounding communities to the city centre with an enhanced public transport experience.

Another important element of public transport in Belfast is the black taxi service. The black taxis provide key community connections to the city centre, that also operate on a share basis in some areas to allow the service to be maximised. It is envisaged that the black taxis will also be integral as feeder services to the proposed BRT system. The black taxis have become a popular tourist attraction, allowing tourists a guided tour of historically significant parts of Belfast.



Public transport in Donegall Square (Belfast City Council)



Car park, Gresham St. (Urban Strategies Inc.)

Car Parking

Transport NI have been monitoring car parking levels in the city centre by conducting biannual surveys of the Belfast area, enabling changes in parking levels to be measured specific to each car park. There are currently in excess of 10,000 publicly available off-street parking spaces in and around Belfast City Centre in addition to extensive on-street parking and numerous private car parks. The provision of these spaces is fragmented into a number of typically low capacity surface car parks owned and operated by a range of stakeholders with inconsistent pricing and information.

The result of the current situation is often that parking is confusing, that occupancy of the total available spaces is relatively low but that parking spaces can be hard to find, leading to significant volumes of traffic searching between car parks and increasing city centre traffic levels.

To resolve these issues a strategy for rationalising parking is required, recognising the influence of parking supply on vehicle volumes in the city centre. By reducing the total number of spaces and locating these in high capacity multi-storey facilities around the Inner Ring Road, drivers can be guided from approach routes to a space by comprehensive real-time parking information, eliminating the need to search for a parking space.



Car parks on the unfinished South Link of the Inner Ring Road (Urban Strategies Inc.)



CastleCourt car park (Urban Strategies Inc.)

3

Policies for the City Centre

Eight policies have been identified for the city centre, covering the eight areas of intervention considered most essential to its success. The eight policies address the universal elements of a thriving city centre as well as challenges and conditions that are unique to Belfast. The policies were identified based on discussions with stakeholders about the health of Belfast City Centre and what it is lacking that a city of its size and stature should have. A series of projects listed at the end of each policy and elaborated in Section 4 suggest some practical opportunities to implement the policies. Five Special Action Areas are later identified, where integrated application of these policies should take place in the short term.

1 Increase the employment population

Belfast is a major European city. Just like many cities of its size, its economy is changing, reflecting the long-term structural changes in the global economy. The transformation from a manufacturing and industrial economy to what is increasingly a knowledge economy has important implications for a city centre because it changes its primary source of economic growth. For a centre to succeed it must attract high quality employment in an environment where cities increasingly compete against one another. The knowledge economy is looking for a sympathetic working environment, an advantageous cost base, good communications and access to a well-trained workforce. The primary private sector components of the knowledge economy are professional, management and financial services, IT and communications; on the public sector side are government, health and education services. This is a work force that operates in office buildings with increasingly high demands for technology, efficient layouts and attractive neighbourhood amenities. The primary areas of growth for Belfast's centre should be focused on the private sector, as public sector growth is restrained and pressure continues to decentralise public employment.

How does Belfast's office sector compare with those in other cities and what are the strategies for growth? Belfast benefits from very low rents compared to other UK cities, one of the reasons it has recently been successful in attracting new IT and professional service employment. The low rents are however an indication of relatively low demand, presenting difficulties in supporting new office construction. That lack of new city centre office growth is exacerbated by the fact that much of the office stock in the traditional office core south of City Hall is in older buildings not appropriate for modern working environments. Whilst increasing

the office population will help to fill these spaces, the possibility of selective replacements to reduce redundant stock and create opportunities for new Grade A office development should be examined. Incentivising the upgrading of existing office space to Grade A standards should also be considered.

Cost pressures on knowledge economy jobs are increasingly severe and the high concentration of such employment in expensive London and South-East England could represent a major opportunity for provincial cities offering an attractive alternative. Belfast must position itself in relation to centres like Leeds, Birmingham, Manchester, Cardiff and Liverpool and determine how to maximise the competitive advantage of its low rental and labour costs and high quality of life. Renewal of the city centre with improved transport access, an attractive public realm, a good retail offer and a sense of buzz and activity will complement these cost advantages.

Much recent office development has taken place in Titanic Quarter and City Quays and the surrounding harbour, areas that are adjacent to but outside the city's traditional core. Many UK cities have similar patterns of dispersed office development in and adjacent to their centres – Manchester City Centre and Salford Quays being a very comparable example – indicating that new office tenants were not able to find suitable space in the core and that office employers and workers did not have a strong preference to be located in the centre. This dispersed office development pattern can detract from the vitality and attractiveness of the core. However the example of Manchester and Salford, whose office districts are much more separated than in Belfast, suggests that what may initially be perceived as competing office clusters can evolve to become a



Regents Place, London (Dennis Gilbert)

complementary offer. Improved physical connectivity to the city centre will help bring important employment areas closer to the city centre including Titanic Quarter Studios, Northern Ireland Science Park, Titanic Belfast and the growing Belfast Harbour and City Quays area. Shrinking the perceived distance and barriers between Titanic Quarter, City Quays and the traditional office core with better river crossings, improved pedestrian connections and good streetscaping can help these disparate office districts present as one appropriately varied offer to the outside investor and tenant.

At the same time, the traditional office core must not be neglected. Appropriate locations to revitalise the traditional office core with new Grade A office space should be identified. Furthermore, the public sector has a role to play in de-risking private sector investment in Grade A office construction in this part of the centre.

In the longer term there is an opportunity to create a prestige office district surrounding the Great Victoria Street Transport Hub. At the gateway to Belfast for a projected 13 million users by 2030, there are a number of potential office sites in the area, including the current premises of the BBC, which would become vacant should the organisation decide to relocate. This location offers the best opportunity for a Grade A office cluster close to the traditional office core with excellent access both within Belfast and to the rest of Northern Ireland and the Republic of Ireland.

Projects:

- Develop a comprehensive knowledge economy marketing programme for the city centre with appropriate inducement packages directed at 'near-shoring' of back office functions in the city centre and other potential office sectors
- Identify key Grade A office sites in three locations and prepare them for development, including:
 1. Traditional office core between Great Victoria Street and Bedford Street
 2. City Quays
 3. Titanic Quarter
- Examine the opportunity for selective demolitions of redundant stock to facilitate Grade A office construction
- Consider ways to incentivise the upgrading of existing office space to Grade A standards
- Undertake a feasibility study/pilot project to determine how Belfast City Council could de-risk private sector investment in Grade A office construction
- Support the creation of a prestige office cluster surrounding the Great Victoria Street Transport Hub by giving the station a presence on the street and identifying and preparing sites for Grade A office development



Sheffield City Centre (Flickr / Joshua Hackett)

2 Increase the residential population

Whilst there are a number of existing communities on the edge of the core area of Belfast City Centre such as Carrick Hill, Sandy Row, the Markets and Donegall Pass, Belfast has a low overall city centre residential population in comparison to other cities. A significant residential population is highly important for the successful functioning of a city centre, providing a home for the knowledge workers on whom the new office sector is dependent. That new population is also key to establishing a high value market for downtown retail, restaurants and entertainment and contributing to the general level of activity in the city centre.

No solid market for private sector housing has yet been established in the centre; the city largely missed the dramatic wave of higher density apartment development that occurred in most UK and Irish cities in the decade before the recession. However the fact that Belfast trails comparable cities in city centre residential population does suggest an unrealised opportunity. Belfast ought to have a city centre population of several thousand. The challenge is to establish strong market confidence in the centre, something which has been lacking to date. Experience in other cities has shown that city centre apartments are typically lived in by younger newcomers to the city and by existing city resident empty nesters. The focus on increasing knowledge economy employment and the reality of continuing demographic change suggest a potential market from both sectors.

Both groups will be demanding in terms of the nature of the housing provided, the quality of the immediate urban environment and the confidence that their investment is secure. The private rented sector may be a logical growth market and a good way to build confidence in the city housing market.

Particular parts of the centre, most promisingly along the river, should be prepared for new market-oriented housing development, either as stand-alone housing or as part of mixed-use developments. On the east side of the river the schemes for Titanic Quarter, Queen's Quay, Odyssey Quays and Sirocco all contain a significant residential component, and suitable sites for one-off apartment or rental housing development exist on the west side as well. Available publicly-owned sites should be marketed in this context, and development of key privately-owned sites should also be supported. Market and Development Briefs should be prepared for key residential sites, and if necessary financial models should be prepared to underpin and support funding package applications (e.g. Build to Rent for private rented housing).

Conversion to residential may be the answer to the centre's vacant upper floor space, particularly in the fine heritage buildings of the retail core. These spaces tend to be inefficient for most office uses, but appeal to the young professional sector who are looking for an authentic urban experience. Hostels, hotels and most promisingly student housing should also be considered and incentivised to make use of and breathe new life into this underutilised asset.

City centre living is not a simple case of "build it and they will come". A compelling, attractive and secure environment, with shopping, open space and other amenities is essential. The overall strategy to improve the public realm, food and entertainment offerings, connectivity and general "buzz" of the city centre is as important to increasing the residential population as ensuring there are appropriate sites for development.

Such a strategy suggests that development should initially focus on quality market housing to ensure that a market can be firmly established. Emerging DSD and DOE policy regarding developer contributions for affordable housing will ensure that an appropriate mix of affordable units is provided as new market housing is developed. The aim is to encourage the development of a self-sustaining quality residential market environment that provides a mixture of tenures and meets the range of needs of a growing city centre population. Better supported social housing opportunities do however exist along the major roads running into the centre and would help, along with retail and other improvements, to bridge the divide between the centre and its adjoining communities.

The opportunity for student housing should be explored in appropriate locations and there is certainly development interest in this sector. Student housing should be carefully directed, located and managed. Where possible it should foster the re-use of Belfast's many city centre heritage buildings. Student life and activity should be dispersed throughout the centre. Some initial pilot student housing projects that involve heritage preservation or the re-use of upper floors of retail buildings should be encouraged.

Projects:

- Identify key residential sites and prepare Market & Development Briefs, in discussion with landowners. If necessary, prepare financial models to underpin and support funding package applications.
- Continue to work with the major educational institutions in and around the city centre to develop a coordinated student housing programme
- Develop a strategy and incentives for the adaptive reuse of heritage buildings, with a particular emphasis on student housing
- Remedy any key deficiencies in the city centre living environment, through improvement of food shopping, day-care, open space and sense of security
- Identify well-supported social housing opportunities along the major roads leading into the centre



Grand Canal Dock Apartments, Dublin (Flickr / Michael Foley)



London Borough Market (Wikimedia)

3 Manage the retail offer



Christmas shopping at Victoria Square (Flickr / Aidan McMichael)

Retail activity in city centres across the UK is undergoing fundamental change. The competition from out-of-centre shopping, new format retail and e-retailing has the potential to provoke dramatic reductions in the requirement for conventional city centre retail space. In addition, Belfast and Northern Ireland generally have lower levels of disposable income relative to the rest of the UK; in 2011, the Belfast catchment area ranked 174th in the UK¹ in terms of affluence. These trends require that city centre retail management be highly directed and realistic.

Another factor identified by retailers as being at play in Belfast City Centre is very high rates relative to rent. City centre retailers find these to be challenging; to Belfast City Council, however, they are an essential source of revenue. A balance must be struck as at a certain point prohibitively high rates damage the Council's revenue stream by deterring potential businesses.

The opening of Victoria Square has been instrumental in closing the retail gap between Belfast and comparable cities. However, the concurrent decline of Donegall Place into a street of discount retailers and mobile phone stores is a trend that must be reversed. It is Belfast's historic retail spine and primary retail showcase and should present as such. Many cities have had success with retail management strategies which provide a degree of oversight and guidance to direct the retail offering, and Belfast is currently lacking in managed retail floor space in comparison to similar cities.

¹ UK Property Market Information Service (PROMIS), 2011

Determining a viable future for the North East Quarter including the Royal Exchange block is critical to conveying a healthy retail message for the centre. The area also contains a wealth of heritage buildings which will need active users to ensure their preservation. Several options need to be explored. If at all possible this area or the nearby CastleCourt Shopping Centre should become the site for another anchor store for the city. Such stores are still of major significance in city centres and would provide a step change for the retail core. Without underestimating the planning and financial implications of directing a department store to the centre, the experience of Cardiff and Bristol is instructive; one proactively secured John Lewis in its centre, the other let it leave for an out-of-town location, with consequent beneficial and negative impacts on their respective centres.

The Urban Regeneration Potential Study by DSD suggests that there is capacity for such a retail-led development scheme in the centre and that Belfast has fared better than many other towns in the region and the Republic of Ireland where the economy has been one of the hardest hit within the European context. However, it is unwise in the current climate to rely too heavily on retail-led regeneration. If the retail option is not possible, then a major non-retail user should be sought for the North East Quarter. Should the BBC decide to relocate it would be an obvious candidate for the Royal Exchange block, although several other good locations exist. A strategy that attempts to fill the block with smaller uses would be encouraged by the addition



of an entertainment/leisure or institutional presence, by converting upper floors to student housing and by the creation of an interesting public space in the centre of the block.

Perceived barriers to outer Belfast and Northern Ireland residents accessing city centre shopping must be addressed as well. Several merchants have raised the apparent problem of adequate parking to serve city centre retail. Quantitatively, there is more than enough parking. The problem is that it is fragmented into numerous typically low capacity car parks owned and operated by different bodies. Rationalisation of parking into larger capacity car parks accessed from the Inner Ring Road would open up development sites and create a much more coherent system. Even without this intervention, what could be greatly improved is the coordinated advertisement of parking availability to visitors to the centre. New technology can provide information in real time about what places are available where.

The introduction of the new east/west BRT service offers a great opportunity to re-brand the centre as a retail destination for the wider community and an integrated marketing programme to build excitement should be developed. Care must however be taken to ensure that its street design is not perceived to restrict access to the centre. 'Loyalty' programmes, coordinated pricing and validation, again exploring new technologies like a unified city 'app' could set Belfast apart in the marketing of its central retail opportunities.

The objective should be to establish a strong, healthy retail axis in the city's core, catering to all market levels and marketing the centre with its own distinctive retail experience. The concerning trends in retail behaviour will most threaten conventional shopping, which can create an opportunity for the city centre which offers the kinds of specialty shopping that can be found nowhere else in the urban region. Local, 'artisanal', one-of-a-kind shops should become a cornerstone of the city centre retail offer. Such shopping, supported by a rich array of accommodation, food and entertainment opportunities, provides a compelling longer trip alternative to online or suburban shopping.

One area that could be home to such a distinctive shopping and entertainment experience is the area around Bank Square and Castle Street. Plagued by a high level of vacancy but increasingly home to distinctive restaurants, the area could, with coordinated management and incentives, become a complementary district to the Cathedral Quarter, with its own distinct sense of place and activity.

Projects:

- Develop a regional planning strategy or urban policy favouring city centre retail activity that could direct large department store/anchor store uses to the city centre
- Develop a refreshed Framework Plan for the North East Quarter including Royal Exchange that includes a mix of retail and non-retail uses
- Develop a Donegall Place retail management strategy and potentially retail management body
- Work with major owners and shopkeepers in and around CastleCourt Shopping Centre on strategies to renew the area's retail offer
- Use the opening of the BRT system as an opportunity for a major re-branding of the city centre shopping experience that emphasises greater accessibility to communities
- Develop a unified city 'app' that markets and promotes the city centre by providing information on a range of topics including public transport, parking, events, sales, etc as well as coupons, booking opportunities, etc
- Develop community policies and grants that encourage the opening of local, artisanal, 'one-of-a-kind' shops, restaurants and entertainment with an initial focus in the Castle St. / Bank Square area
- Create policy to support the retail offer with complementary uses such as accommodation, food and entertainment
- Work with DRD to develop and implement a city centre parking strategy involving consolidation of car parks and real time advertisement of parking availability

4 Maximise the tourism opportunity



Edinburgh Fringe Festival (Wikimedia)

Tourism is a critical industry for a contemporary city centre and one in which Belfast has displayed impressive growth, more than quadrupling visitor trips and tourism spend between 2000 and 2013². Meeting facilities, destination attractions, food, retail, hotels and nightlife are an essential part of a city's presentation to the wider world and a great source of employment at a range of different skill levels. The success of Titanic Belfast in marketing the city on an international stage and achieving admirable visitation has clearly opened opportunities for additional and complementary tourism facilities. However, in comparison to other UK and European cities there are not enough reasons to visit Belfast, not enough things to do and the city does not have a distinctive enough brand.

Tourism is a complex, multi-layered business and the centre should cater to as broad a range of visitation markets as possible. Business tourism is the highest value of all tourist activity, and business-related meetings and events the most remunerative for a city, so the expansion of the Waterfront Hall is an important contributor to such activity. Marketing Belfast as a unique, cost-competitive, multi-attraction, interesting and attractive place for business meetings has to be supported by ensuring the city's offer is as compelling as those of its principal competitors – Liverpool, Birmingham, Manchester, Dublin, Cardiff and Glasgow. Belfast is however not yet a major player, its potential market held back by the lack of direct European and international connectivity from its airports. The proximity of George Best Belfast City Airport to the city centre is an unusual advantage and one that should be used in marketing Belfast for business tourism.

Belfast is in need of a projected 1,000 more hotel rooms between 2015 and 2020, primarily in the 4 and 5 star class,³ and locating some of these in a conference hotel in proximity to Waterfront Hall would be desirable.

² Millward Brown Ulster - Belfast Tourism Monitor 2013

³ ASM Hotel Capacity Study 2014

Targeting a luxury brand that business travelers and tourists would be accustomed to in other places would add credibility to the city as a major destination. Some tourists, however, prefer a hotel experience that is unique to the location, and this is another gap in Belfast's hotel sector. Converting vacant or underutilised historically significant buildings into hotels with a strong local identity would serve the dual purpose of revitalising existing heritage fabric and providing a uniquely Belfast hotel option.

After the justly popular Titanic Belfast, the city centre does not contain any museum, gallery or similar destination of national or international stature when compared with the cultural offering of equivalently-sized European cities. Nor is there any other distinctive destination attraction unique to the city – like VeloCity in Manchester or the new Birmingham Library – that could enrich the visitor experience and lengthen tourists' stay in Belfast. Serious thought should be given to the opportunity to create a second star attraction, preferably by making use of a piece of Belfast's built heritage, such as the Customs House, Crumlin Road Courthouse or Royal Exchange block. One promising opportunity that should be explored is a contemporary visual art museum with both local and global programming. Modern art has proved a strong draw in other cities – local content could give it a special edge. That being said, Belfast does have a multiplicity of very high quality attractions that are simply not on most tourists' radar. The MAC and Ulster Museum, for example, are fine institutions that do not disappoint those who seek them out. There needs to be a concerted marketing effort to make the most of the attractions that Belfast is already blessed with. Improvements to both physical connectivity, harbour cruise dock access, and promotional connectivity are needed to take full advantage of these assets. Some cities, for example, have developed clearly marked "tourist trails" connecting key attractions.

There is room to ramp up or re-invent the festival offer in Belfast, placing the city on the emerging circuit of city annual or biennial festivals like those in Manchester, Liverpool and Glasgow. Often cities will band together in the delivery of festivals by sharing acts, considerably reducing the cost of festival development. Major festivals can create energy comparable to what Belfast recently experienced with the Giro on a recurring basis. One interesting opportunity that should be actively pursued is the installation of a glass roof over the City Hall courtyard to create a multi-purpose, flexible event and exhibition space. It could be home base for new and exciting festivals and at the same time provide a wonderful environment for community events.

Whilst the large stadia sports market is more limited and fragmented than in most comparable European cities, several sporting opportunities could be advanced. The stadia developments at Windsor Park, Ravenhill and Casement and sports unique to Belfast within the UK could be attractively marketed. The remarkable landscape immediately around Belfast makes 'adrenalin' sports – rock climbing, 'Tough Mudder' races, mountain biking, white water rafting, kayaking, etc – all very accessible. And the clear interest in the legacy of the Troubles, its artefacts and images, and the history of conflict and peace-making will remain something visitors to Belfast will want to know about. Black Cab tours are a distinctive and increasingly famous component of the tourist experience.

Contemporary tourism is much more than specific attractions or events. The whole city is the destination; its unique feel, character and level of activity become the reason to visit, stay longer and broaden the range and level of expenditure. Belfast has made great strides in this urban tourism opportunity; the Cathedral Quarter, with its rich mix of restaurants, entertainment and streetlife, the Gaeltacht Quarter, with its unique cultural offer, and the special places like St George's Market, symbolising the distinctive and increasingly recognised food culture of the city. The Bank Square/ Castle St. area could be developed as a compelling and complementary district with a distinct food, entertainment and artisanal character. All these urban attractions could however still benefit from a significant 'ramping up', as complementary offerings to the well-recognised countryside attractions of Northern Ireland – the Giant's Causeway, the Bushmills Distillery, the scenery of the hills and coast, world class golf and other recreational opportunities. There is potential for some quick wins in this regard that will substantially improve Belfast's attractiveness as a weekend destination, for example changing licensing laws so that bars can remain open later and ensuring attractions are open on Sunday mornings.

The city's recent history depressed urban visitation for decades; recovery only really began with the opening of Titanic Belfast. The market for in-city tourism is

growing, especially among young people, but it is highly competitive. Belfast can catch-up, with a 'brand' that clearly differentiates it from its competitors – particularly Dublin. The essence of Belfast's distinctive character needs to be celebrated and clearly articulated to provide a compelling message for why the city centre, in the wider context of Belfast and Northern Ireland, is a place to visit.

Projects:

- Work with George Best Belfast City Airport and Belfast International Airport to understand missing markets and new connections to make Belfast a more competitive option for business conference tourism
- Identify a significant new tourism destination within the city centre underpinned by a feasibility study or business case
- Increase the number and draw of large-scale events occurring in Belfast and explore developing a city festival as a member of a growing international circuit
- Establish Belfast as a centre of 'adrenalin' recreational tourism
- Work with local organisations to amplify the emerging Belfast brand related to food, music, literary and cultural events, festivals and recreation, with the Castle Street/Bank Square District becoming a distinctive complement to the Cathedral Quarter
- Investigate the potential of a new event/exhibition/festival space created by glazing the City Hall courtyard, potentially as Belfast's significant new tourist destination
- Develop a promotion strategy for Belfast's existing attractions including marketing and better wayfinding between attractions
- Identify and implement some 'quick wins' such as changes to licensing laws and encouraging businesses to open on Sunday mornings





5 Create the region's learning and innovation centre

Whilst Belfast is renowned for the quality of its top tier labour force, several studies have identified the presence of a large under-skilled labour pool and noted the relative lack of innovation and entrepreneurial activity in comparison to other cities. Almost 17% of the working age population have no formal qualifications, putting Belfast 62 out of 64 UK cities, and Belfast ranks 64 out of 64 cities in its rate of business start ups⁴. People, their talent, creativity and energy are the drivers of the modern economy and Belfast must develop the best in its domestic population and attract in-migration of skilled newcomers. Surprisingly often it is the new people in a city who become its most dynamic drivers. Both the University of Ulster (UU) and Queen's University are actively seeking international students and that programme should be recognised as a source for new entrepreneurship.

The relocation of UU enhances the educational offer of the city which already houses Queen's University and Belfast Metropolitan College. UU presents a major opportunity to enhance the skills base available to the city centre. The university's capability in IT, digital media, applied arts and professional services and its extensive outreach and continuing education programmes and connections to many of Belfast's cultural, institutional and business organisations will amplify the already substantial impact of having such a large student and faculty presence in the centre.

⁴ Centre for Cities, Cities Outlook 2014

To maximise the benefits of the relocation, these links must be actively targeted, promoted and communicated. The already established Campus Community Regeneration Forum can work to ensure that connections to adjacent communities are well-established, so that the university, and by association the city centre, can be beneficial to the community. Belfast's greatest source of untapped potential lies in the talent of the residents of communities where aspiration and access to education are extremely low. Creating avenues for those who have traditionally been excluded from the labour market to access education and opportunities will simultaneously benefit individuals and the broader economy. In particular, there should be vocational and skills training linked to Belfast's emerging growth sectors. One possibility to further enhance the city centre's role in community educational uplift would be to establish a school in the centre with links to the nearby institutions and businesses.

Compared to other cities, the lower level of innovation and entrepreneurial activity noted in Belfast could be addressed by exploring strategies for more flexible business support structures that similarly placed cities have implemented. Several have created 'cheap, quick, simple' spaces such as incubators for new economic activity. Typically in cleaned-up former industrial buildings, such spaces offer inexpensive, short-term, bare bones locations for start-up business, along with an innovation culture and communal support services.

Manchester's The Sharp Project, London's iCity HereEast and The Artworks Elephant and Toronto's Wychwood ArtBarns are all useful examples of creative incubator facilities that cater to this low cost/high content market. Not only are these spaces beneficial in terms of their creative infrastructure, they can generate a physical attraction as iconic pieces of architecture that reincorporate elements of a city's industrial past. The many vacant and underutilised sites in close proximity to the new UU campus offer an opportunity to create an employment and innovation district that extends the energy of the university and Cathedral Quarter. They should if possible be reserved for such uses rather than for student housing, whose need can be readily met elsewhere in the centre.

The proposed 'Creative Hub' should be further pursued, and the suggested location on Donegall Street relates well to UU and the Cathedral Quarter. Opportunities to connect the Creative Hub to the Central Library should also be explored, potentially as part of the Central Library's plans for expansion, as libraries in several other cities such as Birmingham, Toronto and Vancouver are becoming the locations for the cutting edge of innovation and information dissemination to the wider population. Should the BBC decide to relocate, a site in this part of the centre is preferred to take full advantage of compatibilities with these institutions.

The provision of innovation/incubator/digital/creative facilities could also be combined with a human capital competition. New York City, in an attempt to jump-start its digital innovation sector and to fill redundant downtown office buildings, has instituted a competition with both a cash prize and offer of free space to the most exciting start-ups with the greatest business potential. Belfast City Council could also stimulate innovation by itself launching a competition, possibly for an integrated city centre "app".



The Sharp Project, Manchester (Flickr / James Thorp)

Projects:

- Support the Campus Community Regeneration Forum to develop a comprehensive outreach programme between the University of Ulster and surrounding communities
- Manage the connection between city centre business, cultural, professional and institutional communities to ensure targeted skills training
- Continue to pursue the proposed "Creative Hub" and establish connections with complementary institutions
- Explore the potential for instituting an innovation competition, with a potential focus being a Belfast city "app"
- Contribute to a site options analysis for potential BBC relocation and work closely with the BBC and partners to facilitate the preparation of a preferred site if needed
- Develop a masterplan and regeneration strategy for the University of Ulster district with a focus on improving community educational connections and fostering the creation of an innovation district



Toronto Public Library - Public Tech Centre with 3D Printer (Pinterest / Toronto Public Library)

6 Create a green, walkable, cyclable centre



St. Stephen's Green, Dublin (Bryan O'Brien / The Irish Times)

The new promenades and open spaces along the River Lagan and the landscaping implemented as part of the Streets Ahead programme have made great improvements to the feel and flavour of the city centre and have clearly prioritised the pedestrian environment. City centres have to work on foot, and Belfast has shown excellent direction in making that environment more attractive. The compactness of the centre, and its clear definition by the river and major roads, mean that few places are more than a fifteen minute walk apart.

There are however still too many places that feel too far away, notably the east bank of the Lagan, the northern end of the city centre, City Quays, Titanic Quarter and the surrounding communities, most of which have to be reached after crossing a motorway or rail barrier. What needs to be shortened is the perceived distance, by establishing a lively interesting pedestrian experience along the route. The 'filling-in' of the northern end of the centre with the UU buildings and related activity will transform what is now the centre's least active district.

The introduction of the Belfast Rapid Transit (BRT) system to the centre, with its distinctive vehicles and image, could do much to promote transit as an alternative to driving. A promotion campaign for the new BRT should emphasise the remarkable comfort and convenience the system will offer and the efficiency of its service but also the realisation that nowhere in the centre is more than a few minutes away from a stop – and Titanic Quarter and the Odyssey, now perceptually distant, are easily accessible. It would be prudent to advance the implementation of the north/south line to demonstrate the comprehensive accessibility of the core by quality transit.

The city centre's flat terrain and relatively wide right-of-ways provide the conditions necessary to enhance and connect the bike network. This should be further exploited to maximise its potential and the benefit of the new Belfast Bike Share scheme. The completion of a system of high-quality bike paths linking the centre to surrounding districts, in particular making use of the riverside trails, would connect many significant destinations, creating in effect bike arterials.

The centre is lacking in green space, in tree-lined streets, in the softness that can provide relief in the most densely developed part of a great city. There is a great opportunity to provide a sizable new open space in the north end by reclaiming the parking area around St. Anne's Cathedral for green space and linking it to Buoy's Park and Writer's Square. The centre's traditional office core would also benefit from the introduction of a new urban square to function as a café and meeting place for office workers, adding to its amenity and confirming it as the premium office district in the region. Several potential locations for a small square exist and could be realised in conjunction with new office construction. The tired feeling of the district could be turned around with the introduction of "Streets Ahead South" – an extension of the Streets Ahead programme south of City Hall on Linenhall Street.

Much good work has been done along the river as it runs through the centre, with new landscaping and public spaces such as at Donegall Quay. A more transformative plan for the river corridor is still required, giving it a much stronger presence and establishing it as the major green/blue open space in the city. The plan would include more vertical elements, with major tree

plantings and public art, and dramatic new pedestrian bridges linking City Quays to the Odyssey and the Gasworks to Ormeau Park. Radical traffic calming of Oxford Street would create a much needed soft edge between the core and the river. Continuous bike and pedestrian trails along both sides of the river would link to the new cruise ship port in the Titanic Quarter and include signage identifying nearby destinations and distances to the city centre.

Rebalancing the scales between asphalt and softness on city centre streets must be another priority. Completing the missing South Link of the Inner Ring Road is a first step, then the entire ring should be tamed, humanised and greened to reduce severance from adjacent communities. The Inner Ring Road should become a grand tree-lined boulevard, stitching together the centre and its surroundings instead of keeping them apart. With the introduction of the York Street Interchange there will be excess road capacity on some of the worst offending portions, notably the Dunbar Link, that can be reallocated to support cyclists and pedestrians. Great Victoria Street should also be a focus – its public realm made worthy of the gateway status it will hold with the implementation of the Transport Hub. A landscape transformation would add delight to what is now a hard arterial street.

Projects:

- Develop key bike arterial routes giving access to the centre
- Ensure bike rental and parking facilities are abundant in the city centre
- Plan a major new open space in the northern part of the city centre, combining existing open spaces at Buoys Park and Writer's Square and the land around St. Anne's Cathedral
- Develop a transformative landscape vision for the river corridor through the centre and extending to the Titanic Quarter
- Prepare a major traffic calming scheme for Oxford Street
- Revitalise the public realm of the traditional office core by implementing 'Streets Ahead South'
- Identify a location for a new public square in the traditional office core
- Complete and transform the Inner Ring Road by:
 - Completing the redefined South Link
 - Recreating it as a treed urban boulevard where possible, particularly along Great Victoria Street and the Dunbar Link
 - Implementing 'super crossings' at key intersections



River Animation - Portland, OR Pedestrian / Cyclist Bridge (Alta Planning)



Garscube Underpass Link, Glasgow (7N Architects)

7 Connect to the city around

Whilst the hard boundaries of the river and arterial roads define a compact and identifiable city centre, they also add to its isolation from surrounding communities. If the centre is to belong to everyone in Belfast these physical barriers have to be overcome. There are several important opportunities to re-establish pedestrian, visual, transport and development connections. These connections can be made through landscaping and tree planting, through the proper urban design of BRT connections and through emphasising visual connectivity. All the corridors leading in and out of the centre are in need of improvement, but priority could first be given to those that lead to unique destinations just outside the centre, like the Crumlin Road Gaol, the Gaeltacht Quarter, Queen's University and the Botanic Gardens, Titanic Belfast, and Ormeau Park. Some development infill opportunities exist along these connections for new residential, community or retail/restaurant uses.

Too much of the city centre turns its back on the communities that surround it. Redevelopment and public realm works should ensure a more welcoming design. The improvements planned for the CastleCourt Shopping Centre must also incorporate features to soften its relationship to the west; the completion of the South Link of the Inner Ring Road should act as a connector, not a separator, of communities to the south.

At the north of the centre great care must be taken to ensure that the proposed York Street Interchange is

designed to facilitate north/south pedestrian, bike and visual connection to the extent possible. Most cities, like Birmingham, are now removing their elevated motorway systems. It is understood that the interchange is needed to alleviate existing traffic around the Inner Ring Road, but there is still an obligation to design it in the most sympathetic way possible. Some out of the box thinking is required. Perhaps the pedestrian underpasses could be made truly remarkable with public art, or the interchange itself turned into an enormous green planter? Could the underpass areas be transformed into places for active urban recreation use, like a series of five-a-side pitches or a towering climbing wall?

The M3 underpass leading to City Quays is in need of similar treatment to properly draw that area into the core and make its office development more attractive. To be even more ambitious, might the car parks be replaced with active uses such as restaurants, theatres or galleries, bringing busyness and with it security to a now desolate environment? The Shoreditch Railway Arches in London have recently become a hotspot for new restaurants, bars and art spaces. It is not difficult to imagine the M3 infrastructure used in a similar way.

Two new river crossings, at City Quays/Odyssey and Gasworks/Ormeau Park would greatly improve the connectivity between the city centre, East Belfast and the Titanic Quarter. They can also be designed as stylish objects in the skyline, providing wayfinding assistance and contributing to the River Lagan corridor transformation and Belfast's image as a waterfront city.



Treed sidewalk, Calgary (Urban Strategies Inc.)

Projects:

- Improve the visual impact and pedestrian connectivity through the M3 and York Street interchange through public art, landscaping interventions and community sports facilities
- Construct two new pedestrian bridges across the river at City Quays/Odyssey and Gasworks/Ormeau Park
- Make improved connections to the Crumlin Road Gaol, the Gaeltacht Quarter and Queen's University through streetscaping, signage and infill development
- Work with the owners of CastleCourt to improve connectivity and permeability from the north and west sides as part of redevelopment



Culturlann - Gaeltacht Quarter (Doherty Architects)



Samuel Beckett Bridge, Dublin (Wikimedia / Kankari)



Crumlin Road Gaol, Belfast (crumlinroad.com)



London Cycle Superhighway (Flickr / D1v1d)



Belfast Botanic Gardens (Wikimedia / Ardfern)

8 A shared space

All of the improvements proposed have a sound economic or urban planning rationale, to bring the centre to the level of competitiveness, quality and sense of place befitting a major European city. Belfast is not however an ordinary city and it must also have the centre it needs; a place for everyone from every part of Belfast, a shared common ground. In the context of a divided city, the centre needs to be a place where people can come together to shop, have fun, have a drink or a meal, listen to music and participate in the life of the city around them. The design and management of the centre has to foster that sense of space for everyone – children, students, seniors, people from the east, west, south and north. This involves things as simple as being able to sit by the river, have an ice cream, ride a merry-go-round; things as complicated as major festivals, events and celebrations. The centre needs to focus on what appeals to and attracts all Belfast's citizens. The measure of success for this vision for the centre of Belfast will be that it is a welcoming and attractive place for everyone.

A number of opportunities suggest themselves. Currently the city centre has little to offer children, and as a result parents rarely choose to bring their little ones along on errands or make intentional expeditions to the centre. But the wants of children are simple. A patch

of grass for cartwheeling, a jungle gym for climbing, a pop-up stand for snacking – very minor alterations can make the environment much more hospitable to children. Public realm interventions throughout the city centre, but particularly along the river, should keep children in mind, and in so doing will make the city more appealing to everyone.

Sports and recreation for both youth and adults is another great opportunity. The success of T13 has shown that there is an appetite for such activities in the city centre. The potential for urban sports in underpass areas has already been mentioned. Vacant sites offer another possibility. 'Meanwhile' uses of sites such as Sirocco could turn derelict areas into a public asset while they are awaiting development. In addition to inexpensive sports facilities, community gardens and opportunities for passive recreation could be included. Belfast has no shortage of arts, culture and community groups that would be willing to take responsibility for such spaces.

The river itself can be a space that brings people together. People are drawn to water, so why not make the river more than something to look at? Kayaking, paddle boating, floating restaurants, floating art festivals, floating orchestras, light shows – the river is a natural focus for casual, enjoyable, uncomplicated activities that appeal to all.

Fostering the city centre as a shared space is not something that should be left to piecemeal efforts. There is a management role for City Council in terms of programming space with activities and events big and small. Ensuring that the centre offers a physical and social landscape that is welcoming and inclusive to everyone is one of the Council's key responsibilities.



Active use of the Belfast City Hall lawn (Belfast City Council)



Kayaking in San Francisco Bay (Flickr / City Kayak)



Five-a-side pitch, Shoreditch, London (Urban Strategies Inc.)

Projects:

- Make public spaces in the city centre child friendly through the design of street furniture, inclusion of playgrounds, etc
- Locate facilities for informal sports such as five-a-side pitches in the city centre
- Increase water activity on the River Lagan such as boating, floating restaurants, floating art festivals, etc



Cathedral Quarter Arts Festival, Belfast (media.ireland.com)

4

Projects and Places in the City Centre

To facilitate the implementation of the eight policies for the city centre a series of key projects have been identified which support the vision for the different districts of the centre within the context of the whole. The projects are intended to focus Belfast City Council's efforts on discreet initiatives which will help to achieve the policies and create a liveable and economically thriving city. Many of the projects are to be undertaken in partnership with the private sector or other organisations, as identified in the delivery table in the appendix. In key areas of the centre these projects come together to create a critical mass of initiatives that must be coordinated to maximum effect. Five Special Action Areas have been identified at a greater level of detail to help guide shorter term implementation.

4.1 South Centre

VISION

The South Centre is and should be the primary focus of Belfast's office sector. As such, it is at the centre of Northern Ireland's knowledge economy, an essential driver of the region's economic growth. In a highly competitive inter-city environment, it must attract high quality employment by providing the kind of spaces that the knowledge economy is looking for. Whilst the city centre has other concentrations of office development, the South Centre must retain its primacy by revitalising its office function through a series of strategic moves.



Cabot Square, Canary Wharf, London (Flickr / Matt Buck)



Planned/Proposed Interventions

- | | |
|--|---|
| <ul style="list-style-type: none"> 1. The Great Victoria Street Transport Hub 2. Great Victoria Street streetscape improvements 3. Donegall Square landscape improvements 4. 'Streets Ahead South' on Linenhall Street | <ul style="list-style-type: none"> 5. Linenhall Square 6. Completion of the Inner Ring Road 'South Link' 7. The Ormeau Park pedestrian bridge 8. Shaftesbury Square |
|--|---|

Projects

Great Victoria Street Transport Hub

The proposal for a new transport hub at Great Victoria Station is to be welcomed as a major improvement in the convenience and connectivity of the regional rail system and associated transport links. Significant increases in passenger traffic are anticipated. The opportunity is not just one of engineering, however, it is a chance to redefine the gateway to Belfast City Centre, and is therefore deserving of attention from Belfast City Council as a project of civic importance. The streetscaping and landscaping treatment of Great Victoria Street should reflect its role as a civic gateway. A major re-design of the station and of the ground floors and street environments of the Great Victoria Street frontage would give the station a much stronger presence in the city centre, something which would,

given the experience of other urban rail stations, lead to greatly enhanced development potential on a significant number of vacant sites in and around the hub. Improvements to the secondary entrance on Glengall Street would similarly improve development prospects on the north side of the station.

The new transport hub presents the ideal conditions for long term development of a new Grade A office district. The premises which would be vacated by the BBC if it decides to relocate are located to the immediate east of the station, creating a sizable development opportunity for Grade A office space. There are also numerous surface car parks on Great Victoria Street, Bruce Street / Hope Street and Glengall Street which could accommodate new office development.



Berlin Hauptbahnhof (Wikimedia)

In partnership with Translink, the Strategic Investment Board and other stakeholders, Belfast City Council should work to achieve the following elements:

- Make the new transport hub front onto Great Victoria Street
- Maximise retail opportunities in the approach to the station
- If the BBC relocates, prepare the vacated sites for redevelopment as prestige office sites taking advantage of station accessibility
- Identify other adjacent sites or buildings with Grade A office potential
- Upgrade the public realm of Great Victoria Street with trees and extensive soft landscaping

Grade A Office Development in the Traditional Office Core

A new Grade A office district around the Great Victoria Street Transport Hub is a longer term solution to an immediate problem. Grade A office space is needed now to satisfy the backlog of demand and prevent footloose firms from taking their back office functions to other comparable cities. Whilst Titanic Quarter and City Quays are able to absorb some of the demand, some firms prefer the accessibility of the traditional office core.

It is important to intervene in the office core to accommodate new growth and reverse its current decline. There are several excellent sites for Grade A office infill on Bedford Street and Linenhall Street. As the private sector is not currently developing offices in this area on its own – rental levels being too low – Belfast City Council needs to play a role to de-risk new development activity. Various means could be used, such as providing forward funding to a developer/ investor to enable a development to proceed, agreeing to take the head lease on a potential project, taking an equity stake in a project by co-investing with a private sector partner or simply providing a rental guarantee. The City Council has a requirement for approximately 10,000m² of space which it could leverage to encourage development. A feasibility study should be undertaken to test, on a real project basis, how the Belfast Investment Fund (BIF) could be deployed to support office development, how such a project could work and whether it would meet Council's investment criteria for the BIF.



Spinningfields, Manchester (Flickr / Adam Clark)



Belfast Streets Ahead streetscaping (Urban Strategies Inc.)

Streets Ahead South

The Streets Ahead programme has made a substantial difference to the overall feeling of the retail core. The care and expense put into the streetscaping is evident and the entire district is uplifted by the quality of the public realm. The traditional office core is in need of similar treatment. The district feels somewhat tired and lacklustre, unbecoming of the most important locus of commerce in the province. Extending Streets Ahead down Linenhall Street from City Hall to Ormeau Avenue would create a grand central avenue to anchor the office core. Enduring materials and high calibre design would inspire confidence in potential investors. Such a rejuvenation of the public realm of the office core would enable it to be more competitive with new development areas as a location for Grade A office development.

As part of Streets Ahead South a new open space should be located in the office core. Office workers in the area currently have little choice in regard to where to enjoy a morning coffee, eat lunch with friends or take a phone call in the sun. A prime opportunity exists at the southern terminus of Linenhall Street, should the BBC decide to relocate and vacate its building on Ormeau Avenue. The listed façade could be maintained and the block could become the site of a new public open space, potentially framing a distinctive new Grade A office building.

The Belfast City Centre Public Realm Masterplan identifies the area south of City Hall as phase 6 of the Streets Ahead programme.

Completion of the South Link

The lack of definition of the south end of the city centre can be largely attributed to the reservation of a road corridor for the unfinished South Link of the Inner Ring Road. Instead of being framed with development, Bruce Street, Bankmore Square, Bankmore Street and Ormeau Ave are fronted by surface car parks and undefined open spaces. Completion of the South Link from Great Victoria Street to Cromac Street would not only enable the ring road to function more effectively to distribute traffic across the city centre but would also reduce blight and improve the interface between the city centre and the communities to the south and east including Sandy Row, Donegall Pass and The Markets and create a greater connection to Queen's University Belfast improving student accessibility of the city centre. The wide road reservation would allow the South Link to be completed as a grand tree-lined boulevard with a comfortable pedestrian provision, potentially including a linear open space. Development sites would be opened up and the street could be properly framed with buildings instead of car parks. Devoting special attention to appropriately locating and designing pedestrian crossing points would enhance permeability between residential neighbourhoods and the city centre.

See page 72 for further detail on the envisioned nature of the South Link and Inner Ring Road.

Guidelines

Land Use:

- Offices should be the primary use in the district
- Residential development may be considered along the South Link but should not be considered in the traditional office core or surrounding the Great Victoria Street Transport Hub
- Retail should be encouraged in the traditional office core where appropriate on the ground level to serve the office population
- Prestige office development should be located within the traditional office core or surrounding the Transport Hub
- Lower intensity office development should be located in the Gasworks

Built Form:

- Buildings should be used to frame streets and create spatial definition, particularly along the South Link
- Development in the traditional office core should maintain the grid network, tight setbacks and medium scale that characterise the area today

- Greater height should be permitted for new development surrounding the Transport Hub
- Adaptive reuse opportunities should be considered to preserve heritage buildings on Great Victoria Street and in the traditional office core

Public Realm:

- The public realm of Linenhall Street should be upgraded with "Streets Ahead South"
- Open space provision in the south centre can be enhanced with a renewed Blackstaff Square, a new square on Linenhall Street and a linear greenspace as part of the completion of the South Link
- Shaftesbury Square should be renewed through traffic calming measures, improved pedestrian crossings and upgrading of the public realm in order to support reinvigorated retail, restaurant and entertainment to strengthen the link to the south
- Great Victoria Street should be re-designed as a tree-lined gateway boulevard to the centre



4.2 The Core

VISION

The Core should be Belfast's retail heart, providing a regionally competitive retail offer and a shopping experience that is unmatched anywhere else in Northern Ireland. It should be based upon two intersecting arcs of retail activity – the historical retail spine of Donegall Place and Royal Avenue and the curved dumbbell with Victoria Square and CastleCourt at either end. Recognising that the retail market is changing and Belfast's ability to support retail has limits, the introduction of a degree of mixed use will create a realistic model for regeneration and a diversified offer. The redeveloped Royal Exchange block will be the centrepiece of the reinvigorated retail core.



Cardiff City Centre (Shelley Sandzer)



Planned/Proposed Interventions

- | | |
|---|--|
| 1. North East Quarter including Royal Exchange | 4. Donegall Place retail management strategy |
| 2. North West Quarter including CastleCourt and Castle Street | 5. Belfast Metropolitan College |
| 3. Bank Square | 6. City Hall Courtyard |
| | 7. The Inner Ring Road |

Projects

North East Quarter including Royal Exchange

The Urban Regeneration Potential Study and Retail Capacity Assessment provides the underpinning evidence that there is capacity for a single retail led mixed-use development in the Belfast area over the short to medium term, with development commencing in the next 4-5 years. There is a strong argument that this should be the Royal Exchange, as the retail core is currently blighted by the vacant block, which interrupts what should be a strong retail axis from Victoria Square to CastleCourt. Bringing the Royal Exchange block back to life is essential to creating confidence in city centre retail and preventing further slippage of the retail offer. However, the worrisome retail market and high vacancy rates in the centre suggest that it would be unwise to rely too heavily upon retail-led regeneration to transform the block. A refreshed Framework Plan is required for the North East Quarter including Royal Exchange to recognise the realities of the market.

An anchor use should be found for the Royal Exchange block, reusing some of the block's heritage buildings and/or constructing infill development in the large

vacant space in the middle of the block. If a major retailer such as John Lewis, Brown Thomas or Harvey Nichols can be located in Belfast this is one of the two recommended locations. The patronage it would draw would then support other retail in the North East Quarter. Alternatively, a major institution such as the BBC could become the regeneration driver. A strategy of filling the rest of the block with smaller mixed uses can then be pursued. Other institutional uses, leisure/entertainment uses and student or market housing on upper floors should all be considered. The centre of the block offers the opportunity for a courtyard style open space where the Smithfield Market could potentially be relocated.

Ensuring the city centre remains the thriving retail centre of the region is critical for Belfast's future. City Council should be considering measures similar to those proposed for Grade A office development. A feasibility study should be undertaken to test, on a real project basis, how the Belfast Investment Fund (BIF) could be deployed to support retail development, how such a project could work and whether it would be worthwhile for the Council based on return on investment.



Grote Markt Terras, The Hague (Wikimedia / Joris1919)

North West Quarter including CastleCourt and Castle Street

Both the physical environment of the CastleCourt Shopping Centre and its retail offer are in need of a refresh to upgrade the asset and maximise its potential for the city centre. CastleCourt is currently a major impediment to both north-south and east-west connectivity, a situation which any redevelopment should rectify. A north-south galleria through the middle of the shopping centre would add an important connection, essentially creating a route from Bank Square through to the blocks to the north of CastleCourt which are prime for redevelopment, potentially with the addition of residential and other uses. These blocks also offer the other excellent location in addition to the Royal Exchange for a major anchor store in the centre such as a John Lewis, Brown Thomas or Harvey Nichols.

The existing configuration of the shopping centre turns its back on the west side of the city, with a large fenced car park as the frontage on Millfield. A more welcoming frontage should be presented to that part of the city. The connection across Millfield should draw shoppers from Belfast Metropolitan College and the residential neighbourhoods to the west.

As a gateway from the west and direct route into the retail core Castle Street is well used by the community but its retail offer is disappointing and characterized by high levels of vacancy. The proposed extension to the Primark store at the corner of Castle Street and Donegall Place will consolidate its role as a retail anchor on the street and should be used to catalyse regeneration. Another opportunity to rejuvenate retail on Castle Street that should be explored is encouraging the relocation of some vendors from the Smithfield Market to Castle Street should that block be

redeveloped. This district, including Bank Square, both sides of Castle Street and adjoining smaller streets and alleys is in need of comprehensive reinvention through active retail management and programming. It has the potential to become its own distinctive district as a complement to the Cathedral Quarter.

Donegall Place Retail Management Strategy

The slippage of the retail offer on Donegall Place in recent years is concerning because Donegall Place is the traditional face of city centre retail. A proactive approach should be taken to improving the quality of the retail offer in this critical area. Similar to what was done to reinvigorate streets such as Marylebone High Street in London, a retail management strategy for Donegall Place would take a coordinated approach to identifying needs, preparing sites, luring retailers and facilitating turnover to more desirable uses. Such a strategy would support the Urban Regeneration Potential Study's finding that managed retail floor space is important in retail centres and Belfast City Centre has a much lower proportion in comparison to similar cities.

City Hall Courtyard

The iconic neo-classical City Hall with its white marble turrets and pergolas is one of the city centre's greatest assets. Already a tourist destination, visitation could be substantially increased with the creation of an additional attraction through the glazing over of the internal courtyard. This space would be an ideal festival and temporary exhibition space but could also be available to host community events. Covering the courtyard would be a relatively inexpensive way to create a spectacular new attraction that could perform double duty by supporting Belfast's ambitions to expand its festival activity.

Guidelines

Land Use:

- The retail core should be the centre's primary retail and mixed-use district
- Retail uses should be the dominant use at street level
- Residential uses should be encouraged on upper floors of heritage buildings and as infill development on appropriate sites
- The retail offer should be strengthened with complementary activity such as institutions, cultural facilities, restaurants, cafes and entertainment venues
- Meanwhile uses should be encouraged to occupy vacant storefronts

Built Form:

- Renewal and new development should preserve and add to the dense, connected network of streets and lanes characterising the area
- Development should respect and adhere to the low- to mid-rise scale and built form of the core

Public Realm:

- There should not be significantly more pedestrianisation in the retail core
- The right balance must be struck between road allocation dedicated to the BRT, the car, bicycles and pedestrian activity
- Enhanced streetscaping and landscaping of junctions and streets such as Millfield and Divis Street is required to invite entry to the city centre from the west
- Open space provision in the core can be enhanced with the renewed Bank Square, a courtyard space in the interior of the Royal Exchange block and a public square on one of the blocks north of CastleCourt



Marylebone High Street, London (isabelcostalloliterarysofa.com)



British Museum, London (Flickr / Spiros K)



Liverpool One (Rex Features / Jeff Blackler)

4.3 North Centre

VISION

The North Centre should be home to Belfast's growing learning and innovation culture. Benefiting from the University of Ulster, the Cathedral Quarter, Belfast Central Library, the proposed creative hub and potentially the BBC, the North Centre will be at the forefront of Belfast's digital, media and innovation activity. The primary goal for the North Centre should be to cultivate these advantages and spread the benefit to surrounding neighbourhoods and the whole of the city centre.



Commercial Court, Cathedral Quarter
(Urban Strategies Inc.)



Planned/Proposed Interventions

- | | |
|---|--------------------------------|
| 1. University of Ulster District | 5. Dunbar Link/Inner Ring Road |
| 2. Potential BBC Locations | 6. York Street Interchange |
| 3. Belfast Central Library & Library Square | 7. Underpass projects |
| 4. Cathedral Gardens | 8. Gamble Street Halt |

Projects

University of Ulster District

The northern section of the city centre is the most in need of radical improvement. It has the greatest real and perceived vacancy and is the most dominated by traffic. The new city centre campus of the University of Ulster (UU) will be transformational in both its physical presence and the broad activities it will generate.

The presence of urban universities can, if properly directed, have a powerful beneficial impact in the immediate surroundings and in neighbouring communities. The Community Campus Regeneration Forum is already taking steps to ensure benefits from the university are captured for surrounding neighbourhoods, which include some of the most deprived communities in Belfast.

The development industry has recognised the opportunity brought by the university and the next few years could see up to £300 million worth of investment in this part of the city by the Northside group. It is crucial that this major redevelopment project delivers an appropriate scale of development and mix of uses to harness the regeneration potential of the university, and that stakeholders in the area and throughout the city are engaged throughout the process.

The university must become the energiser of the whole district around the campus, requiring a coordinating

strategy and masterplan, the elements of which are listed below:

- Enhancement of the pedestrian and activity environment around the new campus
- Cathedral Gardens, a major new open space around St. Anne's Cathedral (see page 62)
- York St. Interchange transformation (see page 63)
- Implementation of improved transit connections including the Gamble Street Rail Halt and north-south BRT
- Connections across the Westlink and M3
- Incubator/innovation uses for vacant buildings north of the Dunbar Link
- Connections to the BBC, Belfast Central Library, the proposed Creative Hub, other educational institutions and existing Cathedral Quarter assets
- Business outreach for training programmes and human capital development
- Community engagement/skills enhancement programmes
- Direction regarding the location of student housing

The high vacancy rate and low value development north of the Dunbar Link offer ideal conditions for the creation of an innovation district that builds upon the energy of the university. Taking a cue from similar developments in other cities, Belfast could use these sites to provide 'cheap/quick/simple' spaces such as incubators for new economic activity.

BBC

New BBC facilities have been shown to have had a powerful regeneration benefit for communities such as Salford and Cardiff. In combination with the University of Ulster, the BBC could effect a comprehensive transformation of the northern part of the city centre. It is not only the physical presence of the BBC that is important, but ensuring that connections to the city centre's academic and training institutions are maximised and relationships with city centre cultural, media and other related businesses are enhanced. To this end, a working group should be formed to take forward the BBC project including Belfast City Council, the BBC, the University of Ulster, Queen's University, NI Screen, the Northern Ireland Science Park, and possibly the Department of Culture, Arts and Leisure.

Belfast City Council should take an active role in aiding the BBC's relocation by conducting a site options analysis and facilitating preparation of a preferred site. Three potential locations which should be analysed in greater detail are:

- Lands to the rear of Belfast Central Library, creating a complex of the Library, the Telegraph building, with the BBC fronting on an urban square in between
- A site in new and renovated buildings in the centre of the Royal Exchange block, with an entrance on North Street
- A cleared site north of Great Patrick Street in the York/Nelson/Great George Street block

Assessment of these, and possibly other, potential locations should be made on the basis of the most beneficial effects for academic, entrepreneurial and cultural connections, as well as for heritage preservation and adjacent development stimulation.

Belfast Central Library Expansion

The proposed expansion of Belfast Central Library to become a more modern, user-friendly, multi-media community hub of information fits in very well with the vision for the North Centre. There are numerous synergies with other institutions in the area that should be explored, particularly the University of Ulster and Creative Hub and potentially the BBC. There may be an opportunity as part of the expansion to find a home for the BBC digital archive in the Central Library.



Cathedral Gardens

The North Centre offers the best opportunity for a bold new open space in the city centre. Buoy's Park, Writer's Square and the area currently used for parking surrounding St. Anne's Cathedral should be combined to create a public open space of significant size where events, festivals and celebrations could be held. The design of Academy Street, Donegall Street and Exchange Street should facilitate their use as an extension to Cathedral Gardens when large events require their closure.

Cathedral Gardens should be soft, green, shady. It should provide relief from the harsh urban environment that surrounds it and should be a haven for those who seek a place for quiet contemplation or a peaceful chat. Conversely, it should be busy, active, fun. It should be where talkative UU students eat their lunch and outdoor festivals set up their tents. As the only opportunity for significant open space development outside of the Lagan Corridor, Cathedral Gardens must be multi-purpose, multi-activity – flexible enough to serve all needs.

Cathedral Gardens is proposed to be a part of Streets Ahead 3, albeit at a reduced scale. To achieve an open space large enough to serve multiple purposes and capable of hosting the largest events, it is recommended that in the long term Cathedral Gardens be expanded as described and illustrated below.



Legend

Extent of Cathedral Gardens
New Open Space
Donegall Street traffic calming



Pedestrian priority streets
St. Anne's Cathedral integrated within Cathedral Gardens



York Street Interchange

The York Street Interchange will alleviate a significant bottleneck at the M2/Westlink junction which adversely impacts city centre traffic volumes and congestion levels on a daily basis, therefore the interchange is viewed to be strategically important for vehicular access in the city. However, careful design of connecting north-south routes for pedestrians and cyclists and creative solutions to reduce the visual impact of the interchange and make use of otherwise dead space are required.

Some modest investment in the design of the interchange with the aim of improving development and regeneration potential and non-motorised movement could have significant future benefits. Belfast City Council should work with DRD and other partners to ensure that the barrier effect of the interchange is minimised.

Underpass Projects

Both the proposed York Street Interchange and existing M3 are major barriers to connectivity in the north end of town restricting crucial access to the Harbour and City Quays development. Making City Quays feel like a part of the city centre is dependent on finding a way to humanise the underpass. A simple programme of greening would make a big difference and is a solution well aligned with the Northern Ireland climate. The motorway and interchange could be draped in planter boxes that disguise the harsh concrete with vines. Equally simple, a programme of vibrant public art and lighting could brighten up the dreary environment, making it seem much safer.

Going a step further, underpass areas could actually be turned into productive community spaces. In Toronto the area under a raised expressway was turned into the delightful "Underpass Park." Underpass areas would also be perfect for the construction of skate parks (there is one under the M3 already), five-a-side pitches or climbing walls. Shoreditch in London provides a fine precedent. Thus a detriment could be transformed into an asset by providing space for sports and recreational activities, something that is lacking elsewhere in the city centre.

At the upper end of the effort and expense spectrum, underpasses could be lined with development such as restaurants, bars or galleries. With so many options for transformation, there is no reason for underpasses to remain barriers to connectivity.



Underpass Park, Toronto (waterfrontoronto.ca)



5-a-side pitch, Shoreditch Railway Arches, London (Urban Strategies Inc.)



Animation of underpass space with programming & lighting - A8ernA, Amsterdam, The Netherlands (NL Architects / Luuk Kramer)

Dunbar Link



Legend

Dunbar Link streetscape improvements, (including widened pavement, cycle lanes, and tree-planting) ①

Underpass open space improvements ②
Improved pedestrian junction crossing

Guidelines

Land Use:

- Institutional uses anchor the district (University of Ulster, Belfast Central Library, potentially the BBC)
- Innovative digital / technology / media uses spawned by the university should be encouraged to cluster in the area
- Provision of cheap and cheerful start-up space should be supported on low value sites north of the Dunbar Link
- Student housing should be a secondary use – it should not be permitted on sites with potential for higher value employment uses
- Continuation of the development of small scale restaurants / entertainment / cafes in the Cathedral Quarter should be encouraged
- Upper levels of heritage buildings should be redeveloped as quality residential and student housing

Built Form:

- The completion of a street façade on the Dunbar Link will add spatial definition to the area
- Buildings around Cathedral Gardens should provide a mid-rise street wall around the new open space
- Higher buildings can be permitted on Frederick Street but should step down towards existing low-rise residential development
- Sympathetic and appropriately scaled infill development should be considered in the Cathedral Quarter

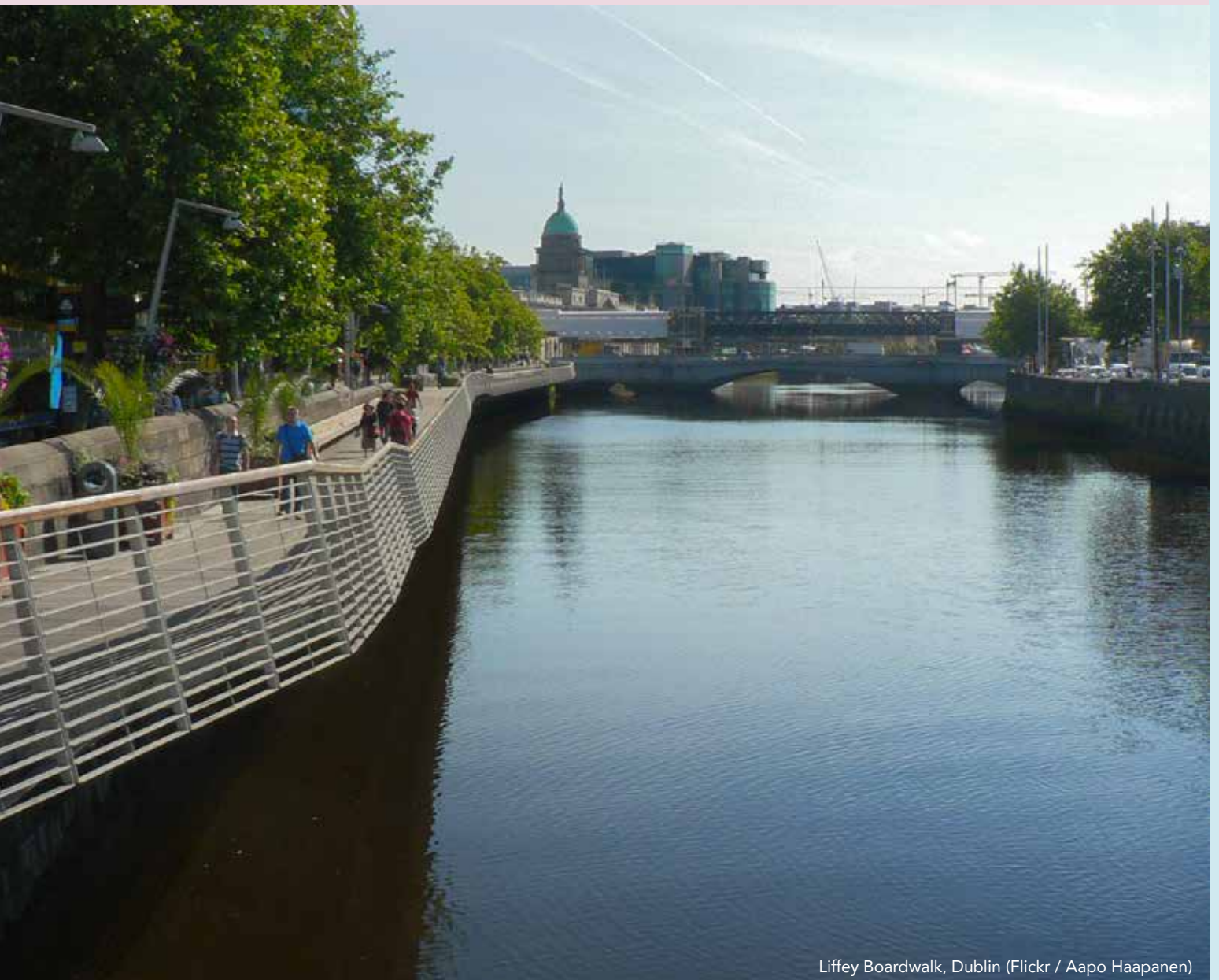
Public Realm:

- Completion of Streets Ahead Phase 3 should be a priority, and treatment of streets around Cathedral Gardens should facilitate their incorporation into the open space when closed
- The landscaping balance should be shifted in favour of soft landscaping over hard paving materials
- Radical reallocation of road space on the Dunbar Link will allow creation of a heavily landscaped and treed boulevard on this part of the Inner Ring Road

4.4 Lagan Corridor

VISION

The River Lagan should be Belfast's recreational spine, bringing the city together with a delightful open space to be shared and enjoyed by everyone. Belfast is, and should be celebrated as, a waterfront city. It is time to re-orient the centre towards the river and transform this once negative space into the city's greatest public asset. A major integrated landscape, urban design, redevelopment and programming initiative will recreate the Lagan Corridor as a magnet for locals and tourists alike.



Liffey Boardwalk, Dublin (Flickr / Aapo Haapanen)



Planned/Proposed Interventions

- | | |
|---|---|
| 1. Oxford Street Reconfiguration | 4. City Quays-Odyssey Pedestrian Bridge |
| 2. Continuous Waterfront Promenade | 5. Residential Waterfront Development Opportunities |
| 3. Gasworks-Ormeau Park Pedestrian Bridge | |

Projects

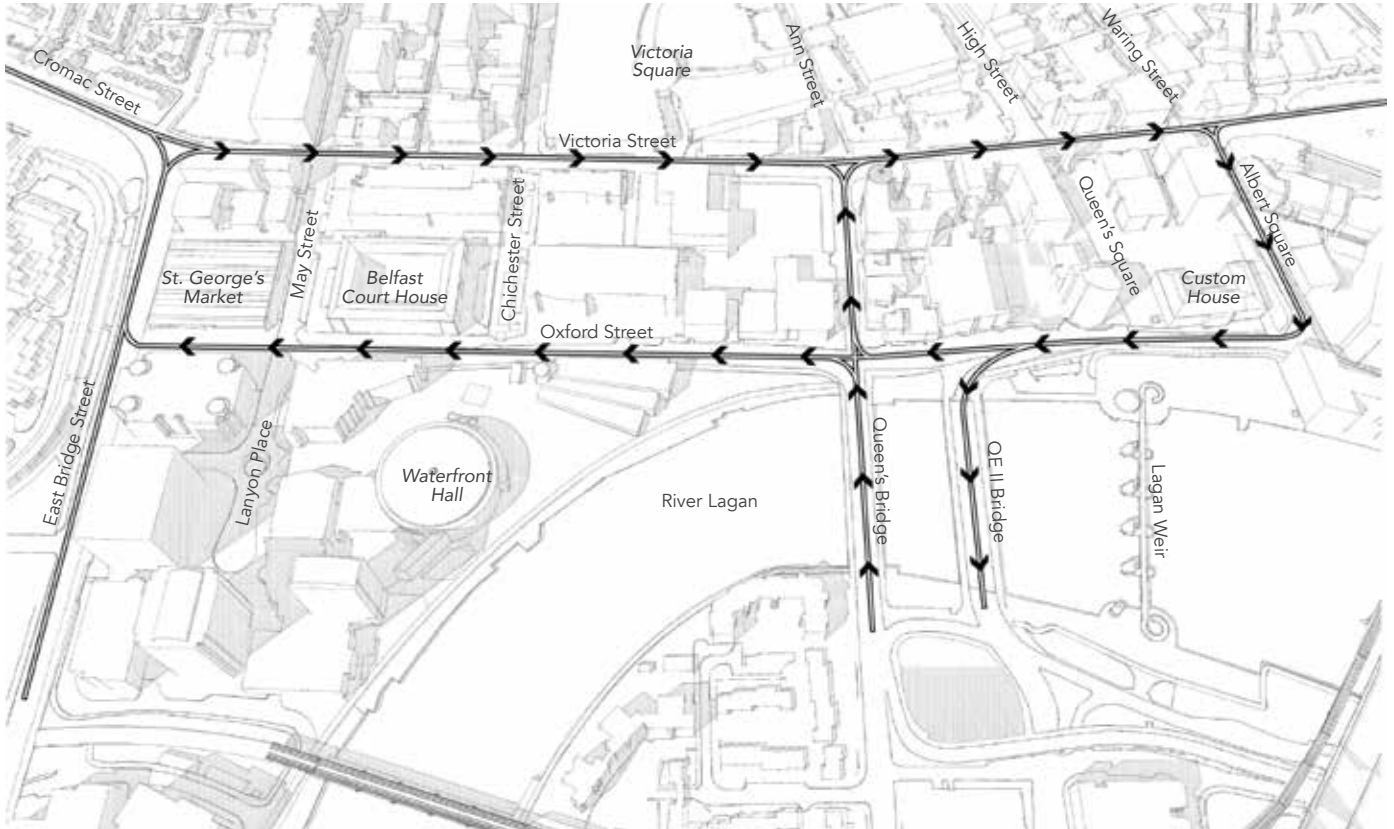
Oxford Street Reconfiguration

Oxford Street and Victoria Street currently form part of the overall Inner Ring Road as an internal one-way loop. This loop carries large volumes of traffic during peak hours and forms a significant barrier between the traditional core and the river. The rationalisation of Oxford Street into a pedestrian, cyclist and public transport focused boulevard would unite the centre and its waterfront. The street's high level of vehicular traffic can be calmed by reducing its existing four lanes to one lane limited to public transport and local access traffic. This would allow extensive pedestrianisation of the street with a wide sidewalk that would accommodate activity such as food vendors and entertainers or expansive patio and café space. Attractions which are currently divided from each other by wide roads and traffic, such as St. George's Market and Waterfront Hall, would suddenly become accessible. Development sites along the river would become much more attractive. A landscaped softening of the city centre's hard edge would provide a much smoother transition to the water.

In order to facilitate the transformation of Oxford Street and remove another barrier to city centre-waterfront connectivity a reconfiguration of Victoria Street would also be required. Traffic lanes would be re-purposed so that it becomes a two-way route, and one lane could be reallocated to support pedestrians and cyclists. A larger junction footprint may also be necessary to accommodate traffic from Queen's Bridge. The introduction of the York Street Interchange is expected to alleviate some of the existing traffic demand around the Inner Ring Road, making the reconfiguration of Oxford Street and Victoria Street feasible. The recent 'Belfast on the Move' initiative, which reallocated existing areas of highway infrastructure within the city centre to prioritise public transport, walking and cycling, is an example of how this could work in practice through reduction of general traffic through the city centre. A post project evaluation of Belfast on the Move showed significant reductions in traffic along sensitive links such as May Street and Chichester Street.

Another key element to facilitate the transformation of Oxford Street is the addition of the redefined South Link to complete the Inner Ring Road. This would provide the enabling measure for a true gyratory system around the city centre, reducing unnecessary circling and 'rat-running' of traffic.

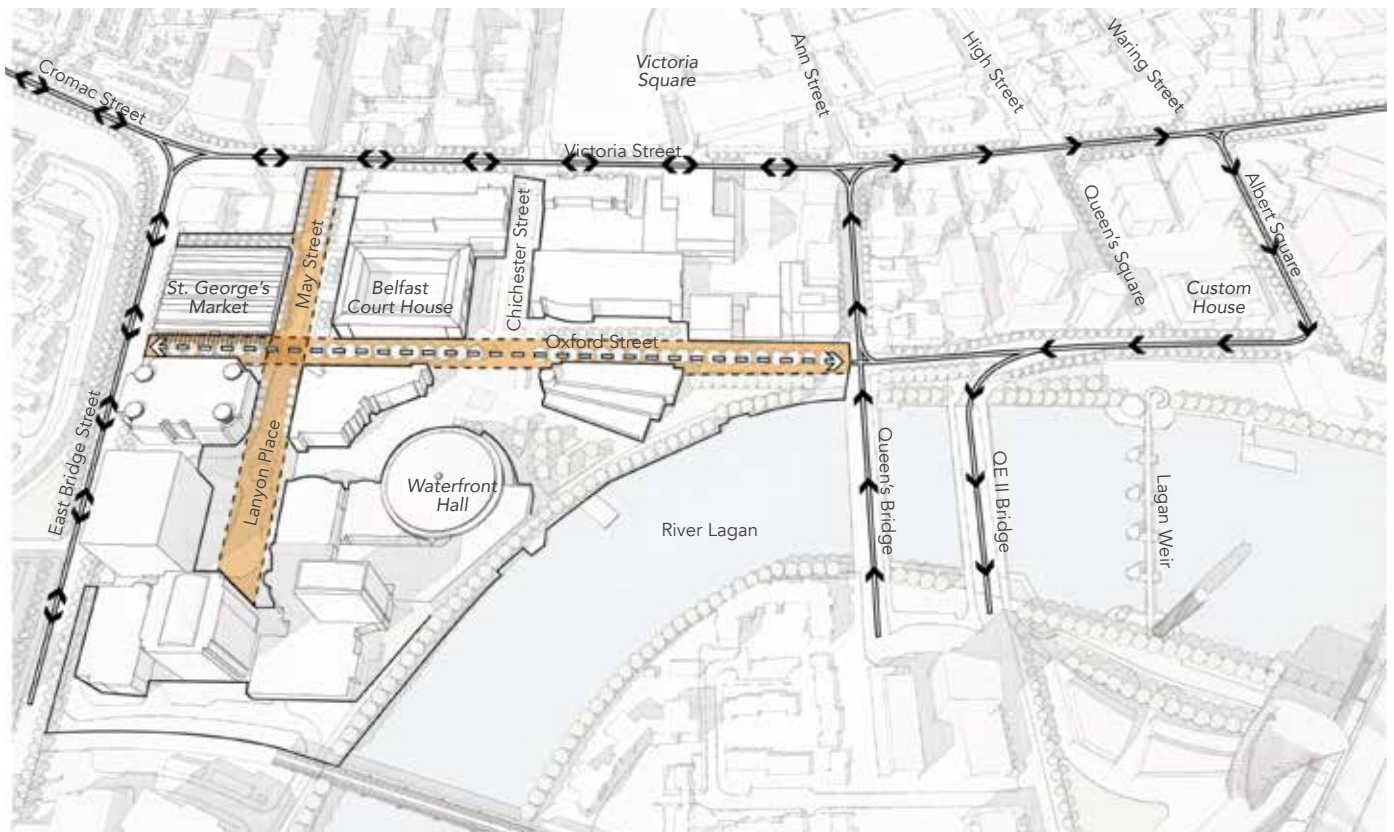
Oxford Street Reconfiguration



Currently Oxford Street and Victoria Street form a one-way gyratory system that adjoins the Inner Ring Road and forms a barrier between the city centre and the River Lagan

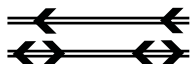
Legend

One-way road



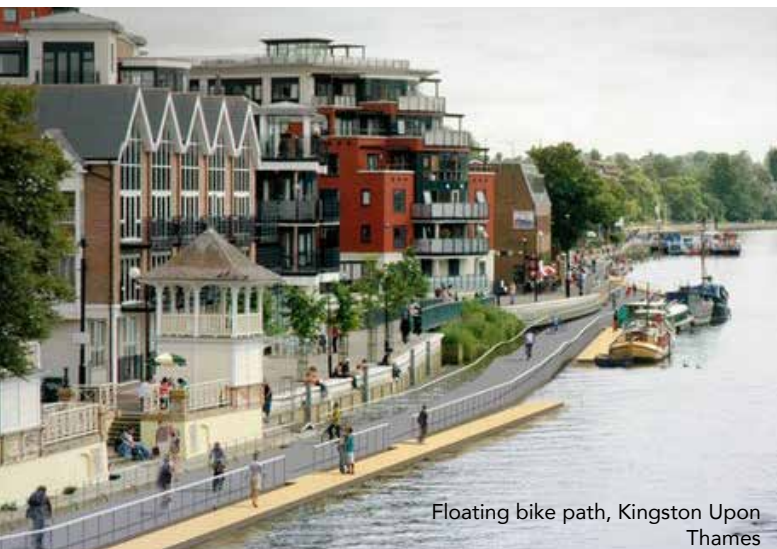
Legend

One-way road
Two-way road

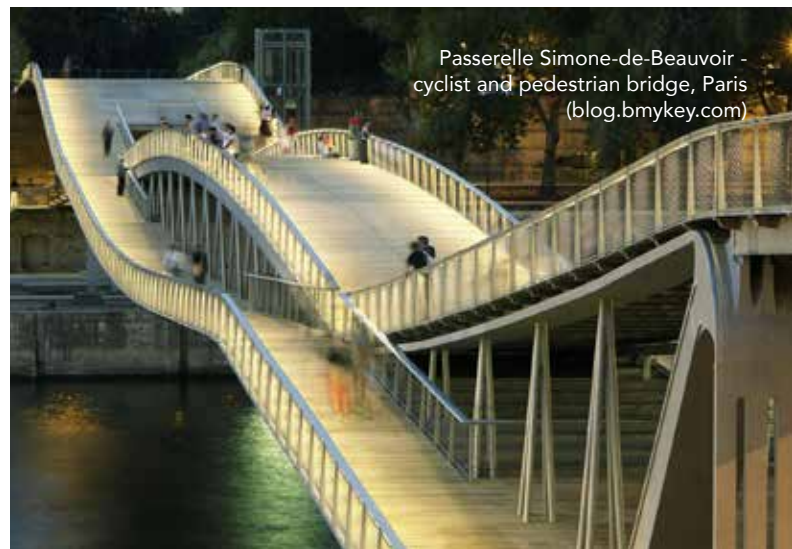


Pedestrian priority street (limited vehicular traffic permitted)





Floating bike path, Kingston Upon Thames



Passerelle Simone-de-Beauvoir - cyclist and pedestrian bridge, Paris (blog.bmykey.com)

Continuous Waterfront Promenade

A continuous and generous promenade should run on both sides of the river with provision for both pedestrians and cyclists. Where there is no spatial provision for a waterfront promenade, floating boardwalks and pontoon walkways should be employed to maintain continuity. On the east side of the Lagan the promenade should begin at the cruise ship docks and continue south through Ormeau Park, drawing tourists beyond Titanic Belfast to discover the other attractions that the city centre offers. On the west side of the Lagan the promenade should extend from City Quays in the north to at least the Gasworks in the south. The two new pedestrian bridges, along with the widened and improved weir, will provide multiple connections that turn the promenade into a loop that can be used as a venue for charity runs and school races.

This project would consist of the following elements:

- Connection of existing and provision of new pedestrian and cycling pathways along the River Lagan
- An extensive landscaping programme to thoroughly 'green' the promenade
- Public art installations at strategic locations
- Provision of bike stands and cycle share docks
- Larger open spaces along the course of the promenade
- Wayfinding to direct users to attractions along the length of the promenade as well as nearby city centre destinations

Two New Pedestrian Bridges

Two new pedestrian bridges would significantly improve connectivity and transform the relationship between open spaces and development sites on the two sides of the river. Ormeau Park, a significant greenspace on the fringes of a city centre lacking in greenspace, can be made accessible from the centre by the construction of a bridge from the Gasworks to its north end. The Odyssey and Titanic Quarter, close enough to walk to from the core if only there were a pleasant way to do so, can be made perceptually much closer by a bridge from City Quays to the Odyssey. As Titanic Quarter continues to develop its residential, office, institutional and cultural offerings and as the Odyssey Trust begins to develop its surface car parks, convenient access across the river will become even more critical. Whilst necessary for purely functional reasons, the bridges also offer an opportunity to add some drama and style to the Lagan Corridor. The design of the bridges should be of the highest quality, preferably with a strong vertical element to make them visible and recognisable from afar as new architectural icons for Belfast.

River Animation

The development of the Lagan Corridor as a recreational destination in the city centre can be assisted by encouragement and programming of water-based activities. Belfast has already seen the potential of this strategy with the success of the Tall Ships Festival. Multiple events and activities, both big and small, are required to fully realise the recreational potential of the waterfront. Boat launching points and boat rental services should be provided for the urban boating enthusiast. Floating restaurant barges, performance stages and art exhibits can add an extra dimension to culinary and cultural experiences. Dramatic bridge lighting can make a spectacle out of necessary pieces of river infrastructure. The natural pull of water should be exploited to bring people together in organised and informal activities.

Programming of the open spaces along the corridor can also be used to draw people in and create excitement. Fairs, outdoor markets, fun runs, concerts – in the context of an urban waterfront, the more activity the better.

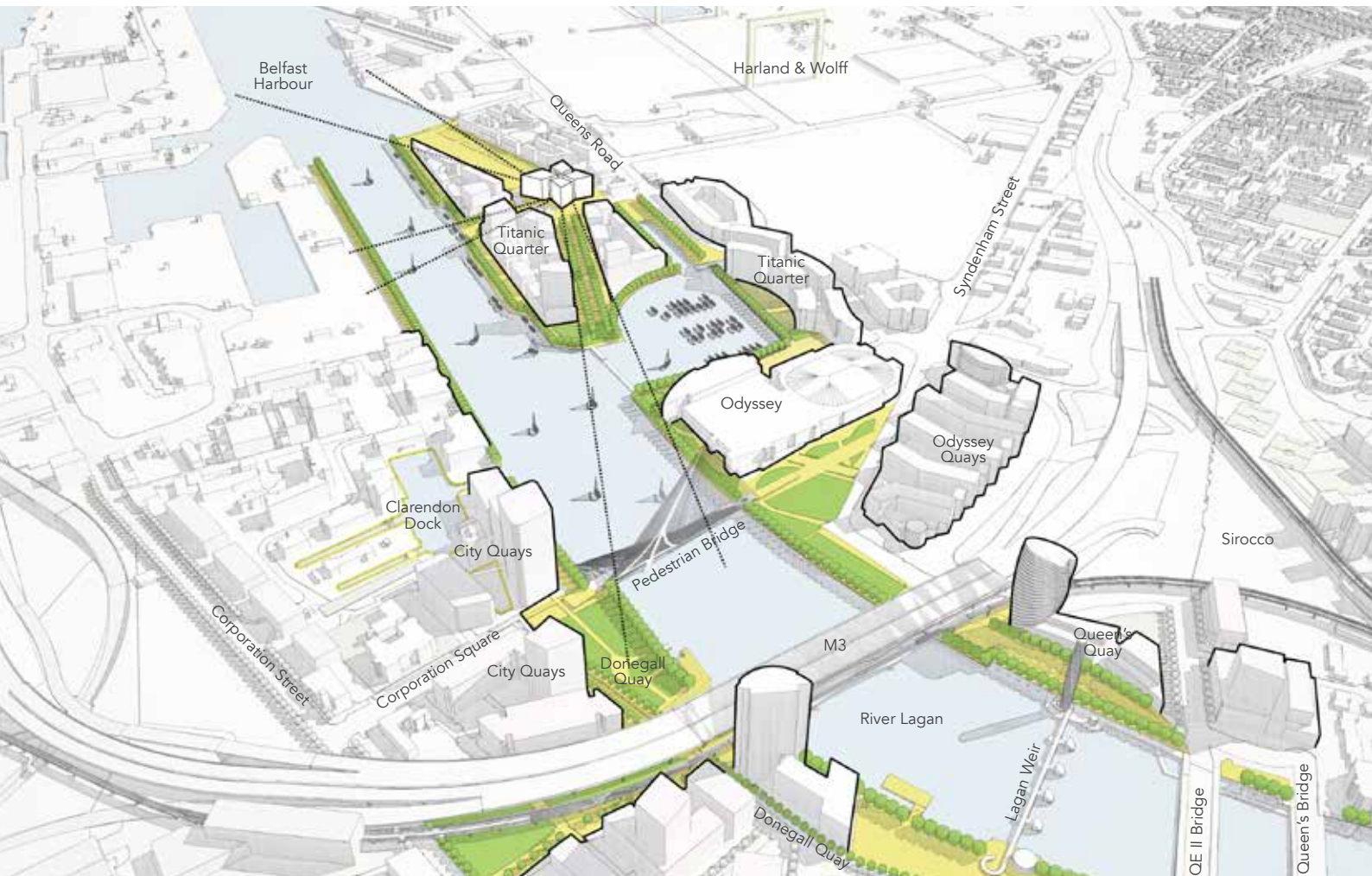
Waterfront Residential Development

Increasing city centre living is essential to the health and vibrancy of Belfast City Centre and experience from other cities has shown that waterfronts are a prime location for residential development. Sites for new residential development along the River Lagan include Titanic Quarter, City Quays, Odyssey Quays and Queen's Quay. Sites in public ownership should be evaluated for residential development potential. Market and Development Briefs should be prepared for all key development sites, in discussion with landowners if privately owned. The use of financial models to underpin and support funding package applications should be explored. The potential to retrofit and retain some existing former industrial structures could also be considered as a means of preserving Belfast's remaining waterfront heritage.



Waterfront development with wide open space buffer, Sodra Vallgatan, Malmo, Sweden (Flickr / La Citta Vita)

Waterfront Development & Open Space



Legend

New Open Space



View corridor



Guidelines

Land Use:

- Residential development should be encouraged along both sides of the river
- Office development should be accommodated at City Quays, Titanic Quarter and the Maysfield site
- Additional significant entertainment and cultural uses should be encouraged at key sites such as the Customs House and Titanic Quarter
- 'Meanwhile uses' such as sports fields and community gardens should be introduced on the Sirrocco site

Built Form:

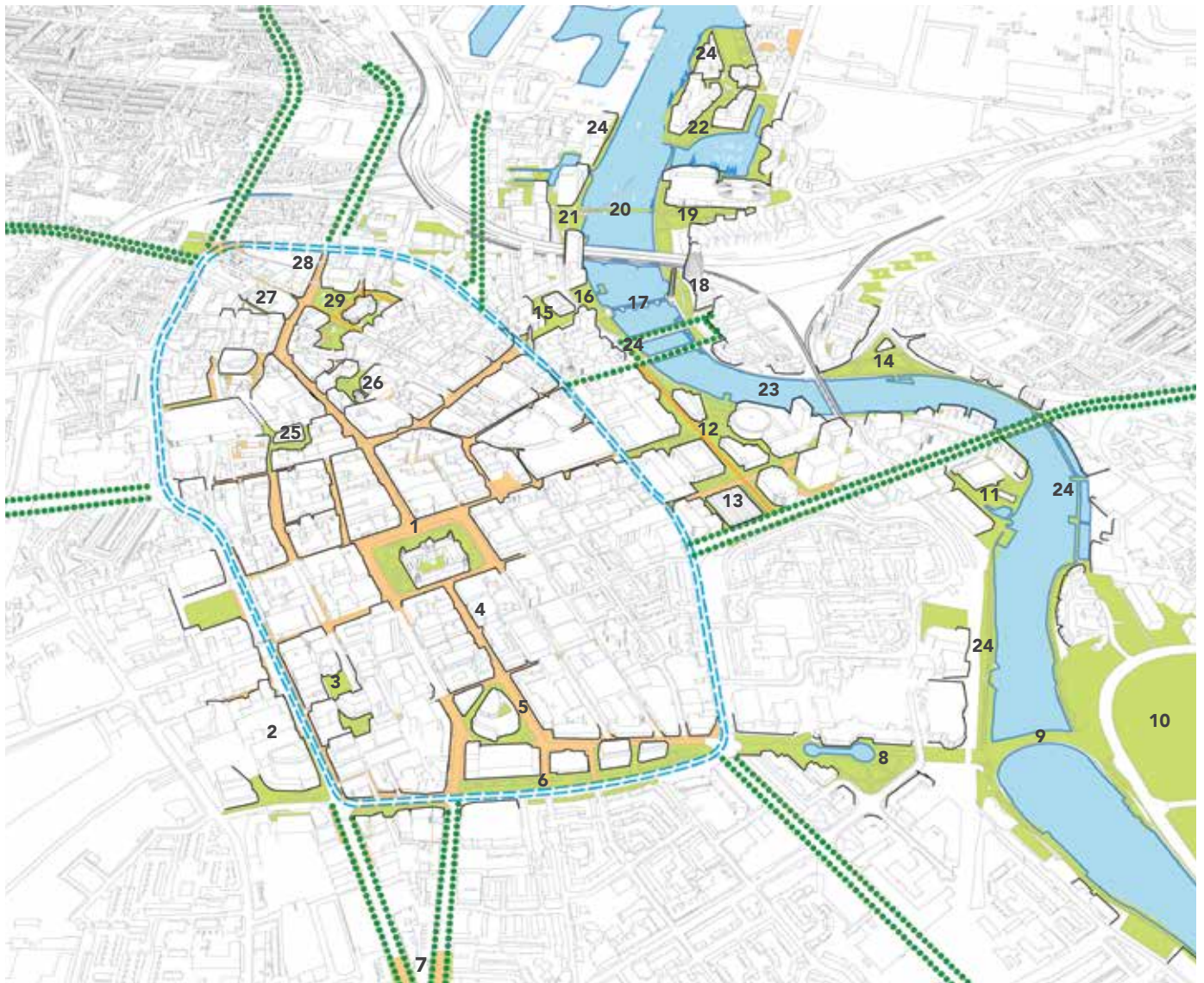
- Development in the Titanic Quarter should maintain views of Titanic Belfast from key points
- Development along the river should maintain views of and permeability to the water
- Development along the new waterfront promenade should not overhang the promenade
- Taller buildings should be permitted along the river in line with existing development

- Heights and massing should be scaled down closer to existing neighbourhoods

Public Realm:

- The Lagan Corridor should be radically 'greened' with trees, grass and gardens
- The waterfront promenade should be punctuated by larger open spaces which could include parks, sitting docks or plaza space
- A generous buffer of open space should be provided between development and the river
- Frequent connections should be provided from adjacent streets and neighbourhoods to the river
- Design of public spaces should cater to all age groups, with particular attention to elements for children
- The Queen's Quay arterial road 'knot' should be simplified to eliminate dead space and improve configuration of development sites

Open Space System



Legend

- Open Space
- Shared Streets
(A mix of pedestrian-only & traffic calmed streets)
- Improved Inner Ring Road
- Improved community connections



Open Spaces

- | | |
|--|--|
| 1. Donegall Square | 16. Donegall Quay |
| 2. Great Victoria Street Transport Hub | 17. Lagan Weir |
| 3. Blackstaff Square | 18. Queen's Quay Open Space |
| 4. Linenhall Street - 'Streets Ahead South' | 19. Odyssey Quays Open Space |
| 5. Linenhall Square | 20. City Quays-Odyssey Pedestrian Bridge |
| 6. Inner Ring Road 'South Link' | 21. City Quays Open Space |
| 7. Shaftesbury Square | 22. Titanic Quarter Open Space |
| 8. Gasworks Open Space | 23. River Lagan |
| 9. Ormeau Park Pedestrian Bridge | 24. Riverfront Promenade |
| 10. Ormeau Park | 25. Bank Square |
| 11. Belfast Central Station Open Space | 26. Royal Exchange Open Space |
| 12. Oxford Street/Waterfront Hall Open Space | 27. Library Square |
| 13. St. Georges Market Open Space | 28. Streets Ahead North Expansion |
| 14. Sirocco Open Space | 29. Cathedral Gardens |
| 15. Custom House Square | |

4.5 City Centre-Wide Projects

Not all projects fit neatly into one of the four areas defined for the city centre. Some might be implemented in any of the four areas, some must be implemented at a wider spatial scale, and some are not specifically spatial at all. This section details seven projects for the city centre as a whole.

Projects

New Tourist Attraction/Event

The city centre tourism offer must be improved. One strategy would be to create a second major attraction/destination to complement the success of Titanic Belfast. Many suggestions have been made regarding the nature and content of such a new facility, with considerable support for a contemporary visual art gallery. Several potential sites could be considered, but sites which involve the retention/re-use of heritage buildings in combination with modern additions might make the best statement about the new city centre. Four possible sites are:

- The Customs House
- The Royal Exchange block
- The enclosed City Hall courtyard
- The Crumlin Road Courthouse

The content and programming for such a gallery should be formulated to present a unique combination of local and global, contemporary and heritage, traditional and modern media, all connected to the art, media and innovation scene of the centre.

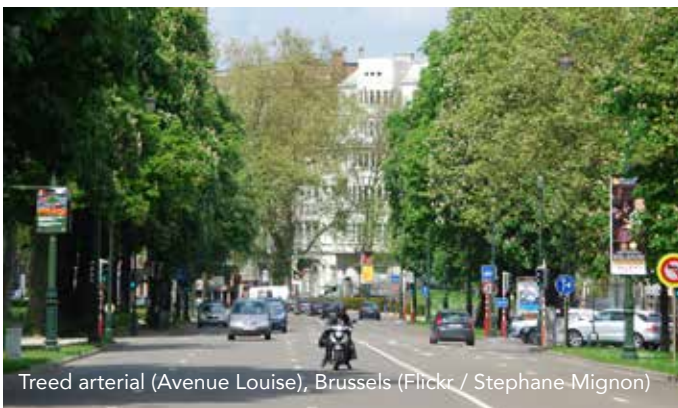
Securing funding for the development of a new attraction may however prove difficult and may result in competition for funding with excellent existing facilities such as the MAC. Another strategy that should therefore be considered is the establishment of a major annual or biennial cultural festival. There are many aspects of Belfast's distinctive culture that could present interesting themes for urban tourism development. Belfast's rich literary history, particularly the strong connection to Seamus Heaney, suggests a literary festival. The strong local music and storytelling scene could be further developed into an annual event. The growing interest in genealogy research suggests an opportunity to draw in the worldwide Northern Irish diaspora. There may be an opportunity to ramp up one of Belfast's many existing festivals into an event with an international reach. Rationalisation of the existing festival programme is certainly indicated, with a differentiation between local events and larger festivals with the potential to become a major tourist draw.

Reimagining the Inner Ring Road

The Inner Ring Road, composed of Cromac Street, Oxford Street / Victoria Street, Dunbar Link, Frederick Street, Millfield Street and Great Victoria Street, currently forms a partial gyratory loop around the city centre. It performs an important function for the overall flow of traffic into and out of the centre and provides linkages to the main arterial routes around the city. It is this gyratory function which largely facilitated the 'Belfast on the Move' scheme by directing general traffic onto the Inner Ring Road whilst discouraging use of the city centre as a through route. However, the existing ring road is limited from acting as a complete gyratory due to the missing South Link between Great Victoria Street and Cromac Street. The addition of this missing link to complete the ring road would enable greater network simplicity and reduced traffic congestion within the core area.

Currently, the Inner Ring Road forms a major barrier that effectively divides the city centre into inner and outer zones with up to six lanes of traffic that must be braved by pedestrians if they are to enter or leave the inner zone.

The redesign of the Inner Ring Road should give it a coherent identity as a grand, green urban boulevard. The extent to which this can be achieved will differ along different portions of the ring road. Where major road space reallocation is possible, such as at Oxford Street, Victoria Street and the Dunbar Link the addition of a treed median or linear greenway should be considered. Where it is not possible to reallocate space from cars to people the programme may consist simply of major tree planting and other soft landscaping within existing sidewalk provision. The severity of the barrier created by the Inner Ring Road will be substantially reduced if it becomes a soft, green, aesthetically pleasing street rather than a hard grey one.



Treed arterial (Avenue Louise), Brussels (Flickr / Stephane Mignon)



Pedestrian super-crossing, Cardiff City Centre (AECOM)

Pedestrian 'super-crossings' should be provided at key points of demand along the Inner Ring Road to facilitate safe and convenient pedestrian movement between the city centre within the ring road and the neighbouring areas outside it. At super-crossings pedestrian movement is prioritised over road traffic in order to provide a direct route without the need to cross traffic in multiple signalised stages. Differentiated paving materials are often used to indicate to pedestrians and motorists alike that these crossings are to be treated differently. Super crossings are proposed at the following three junctions:

- Divis Street/Millfield
- York Street/Frederick Street
- Dunbar Link/Corporation Street

Junction improvements are proposed at eight further locations along the Inner Ring Road. These improvements would provide greater priority and connectivity for pedestrians and are located on the main routes into the city centre that cross the Inner Ring Road:

- Cromac Street/Ormeau Avenue/Ormeau Road
- Cromac Street/May Street/Victoria Street
- Oxford Street/May Street

- High Street/Victoria Street
- Dunbar link/Nelson Street
- Clifton Street/Carrick Hill/Donagall Street
- Peter's Hill/Carrick Hill/North Street
- Wellington Place/College Square East

The Inner Ring Road also provides the opportunity to rationalise parking provision and management in the city centre. There are in excess of 10,000 parking spaces in the city centre, yet drivers frequently complain that they cannot find a space due to the fact that the spaces are split between 52 uncoordinated and poorly signposted car parks. A reduction and rationalisation of parking locations is proposed whilst maintaining the current capacity. The Inner Ring Road should act as a recognisable gyratory system that can lead motorists to convenient parking opportunities. High capacity car parks should be accessed from the Inner Ring Road with real-time information on how many spaces are available in each location displayed along the road. This will reduce congestion caused by drivers circulating on lower capacity city centre streets as they search for a parking space. It will also open development sites within the city centre on smaller car parks no longer needed.



Amsterdam riverfront bike lane (Urban Strategies Inc.)



Ottawa riverfront (Urban Strategies Inc.)

Cycle Network

Cycling is gaining momentum in Belfast as both a leisure pursuit and a form of transport. The facilities to support cycling have improved as a result of Belfast on the Move but the cycling network is still rudimentary and has largely developed in a piecemeal fashion in relation to other schemes as opposed to forming around a defined plan for cycling.

Cycling in the city centre is set to be given a boost in visibility by the Belfast Bike Share scheme. Due for launch in spring 2015 the first phase of the scheme will provide 30 stations at key locations within the city centre such as City Hall, Great Victoria Street, Waterfront Hall and Queen's University.

The focus on city centre regeneration, introduction of the bike share scheme and forming of the DRD Cycling Unit represent an ideal moment for Belfast City Council and DRD to work together to crystallise strategy for cycling in Belfast and ensure that cycling is a central consideration of planning.

The cycling network needs to start well beyond the city centre and offer continuous and legible routes to the centre. The key steps to completing and upgrading the cycle network include:

- Design of a network that incorporates current routes and is matched to current and future patterns of movement
- Completion of missing links on radial routes
- Establishment of new routes between major origins and destinations
- Expansion of signage on core cycle routes
- Provision of abundant bike parking facilities
- Reallocation of road space on the Inner Ring Road to create a segregated cycle superhighway that can perform the same role for cyclists that the ring road currently provides for vehicles

Community Connections

The city centre needs to embrace and welcome Belfast residents, many of whom never venture to enter it despite living on its doorstep. The road reallocation, greening, supercrossings and enhanced junctions on the Inner Ring Road will make a significant difference to the interface between the centre and some of the closest residential communities. A similar programme must be undertaken to re-establish pedestrian, visual, transport and development connections for communities that are a little further out.

All the corridors leading into and out of the centre are in need of improvement, but five have been identified for prioritisation due to the connections they provide to important destinations.

- A pedestrian bridge from City Quays to the Odyssey, which draws Odyssey Quays and Titanic Quarter into the city centre
- A pedestrian bridge from the Gasworks to Ormeau Park, which provides a connection to a major public greenspace
- The 'Clifton Gateway', which connects the University of Ulster and northern part of the centre to the Crumlin Road Courthouse and Gaol
- The connection from Divis Street through the Westlink to Falls Road and the Gaeltacht Quarter
- The connection through Shaftesbury Square to Queen's University and the Botanic Gardens

The harsh pedestrian environment that the latter three provide today should be upgraded through landscaping and tree planting, encouraging infill development of new residential, community and retail/restaurant uses and emphasising visual connectivity.



Liverpool Mathew Street Festival (Flickr / Ji Ruan)

City Centre Management

Many of the policies and projects in this strategy will require the active management of the city's retail offer and an integrated programme management approach to activities, festivals and events across the city centre's events spaces. It is all part of the fundamental imperative to increase the level of excitement, activity and 'buzz' in the city centre. The current lack of coordination caused by piecemeal planning by different organisations leads to conflicts and missed opportunities. One off events often fail to capture the potential for lasting benefit to the city centre.

Belfast City Council should review the current structures for the delivery of events and animation of the city centre. New structures should be put in place to coordinate retail promotion, reduce the long and short term problem of shop vacancies, implement meanwhile uses of vacant spaces, encourage activities such as urban sports, animate the city centre and organise

major annual festivals. Belfast City Council must work with bodies such as Belfast City Centre Management (BCCM), the proposed new BID Company which may replace BCCM, Visit Belfast and other public, private and third sector organisations in a coordinated fashion on joint initiatives.

The objective of this review should be to foster the development of the city centre as a thriving retail centre and a fun, welcoming and shared space for everyone in Belfast and the tourists who choose to visit.

Conversion of Vacant Space

Belfast City Centre has a plethora of beautiful heritage buildings, many of which are entirely vacant or vacant on the upper floors and are in danger of deterioration. Its fine architectural legacy is an asset that Belfast cannot afford to lose, therefore a strategy to preserve these buildings and bring them back into use must be found. The proposal for student housing in the former Belfast Metropolitan College Building at College Square East is to be welcomed and more of such opportunities should be sought out and encouraged. Student housing in particular is well suited to heritage conversion projects. Hostels and hotels are possibilities as well.

Conversions to more permanent market and rental housing should also be pursued. Apartments in converted historic buildings will appeal to the young professionals who will likely be the source of new city centre residents in the short term. Second floor spaces above retail units which are frequently vacant offer another potential source of inexpensive housing that might also improve the viability of ground floor shops. For modest cost old warehouses could be made habitable and used as live/work spaces by creative types. Belfast City Council should undertake a pilot project to determine what regulatory changes and incentives/financial support are required to facilitate the conversion of vacant space to housing.



Fort Point Loft Housing, Boston (AIA)

4.6 Special Action Areas

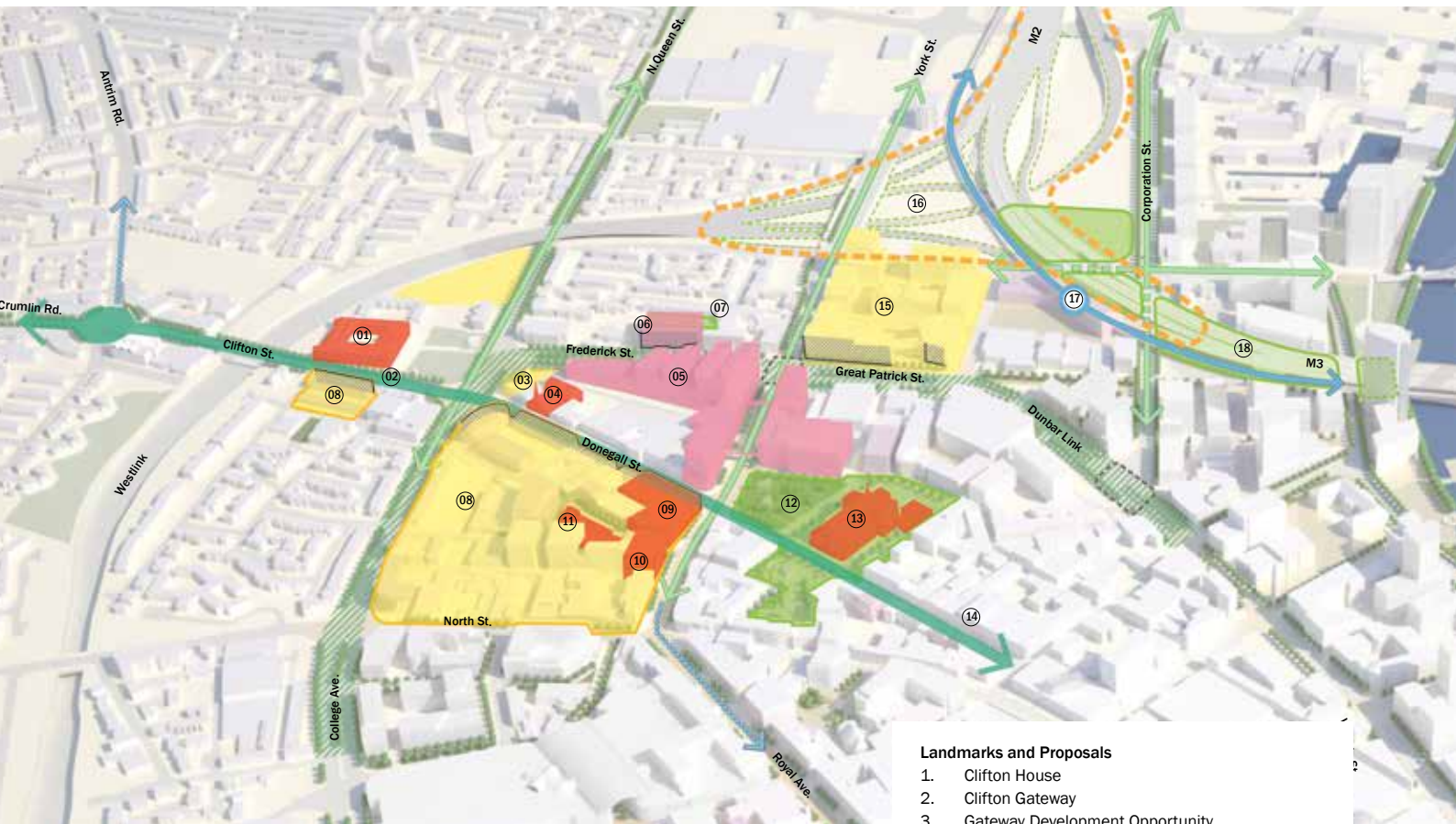
The Regeneration Strategy and Investment Plan has set out in previous sections a number of overall policies and projects for the city centre and its four major sub-areas. To achieve the desired results for the improvement of the centre these policies, with respect to economic development, transport, urban design, retail management and other initiatives, have to be implemented in a coordinated fashion. In the process of undertaking the strategy it was clear that certain areas within the centre were in need of such an immediate, detailed and integrated planning approach.

Five Special Action Areas (SAAs) have therefore been identified as parts of the centre where more intensive local plans should be prepared to forward their regeneration in line with the larger ambitions of the strategy. These are also areas where a more pressing need for action has been identified, either to coordinate the beneficial effects of major new institutional developments, such as the University of Ulster or the expansion of Waterfront Hall, transport improvements such as those proposed for Great Victoria Street station, or to initiate the comprehensive regeneration of a declining retail area, such as in the Royal Exchange block and area between Castle Street and CastleCourt.

The five areas identified are the Northern Quarter, the Western Quarter, the North East Quarter including Royal Exchange, the Transport Hub and the Oxford Street and Eastern Bank District. To differing degrees more intensive planning work is already underway or contemplated in each of these areas. What is anticipated for each SAA is that a comprehensive action planning exercise would be undertaken that prepared a more detailed local master plan identifying specific projects and initiatives along with urban design and transport guidance for their realisation. The plans for the SAAs would not be restricted to physical planning matters but would also set out any required programmes with respect to social, educational, economic development, retail and event management, marketing and related actions. To the extent possible such plans would be accompanied by an implementation and delivery schedule identifying the proposed timing and source of funds.







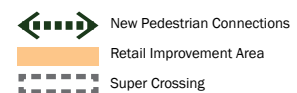
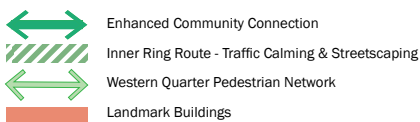
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|--|--|--|---|
| | University of Ulster – Belfast Campus | | Inner Ring Road - Traffic Calming & Streetscaping |
| | Historic Buildings & Landmarks | | Open Space / Recreation Opportunities |
| | Plan Proposals | | Enhanced Community Connection |
| | Development Opportunities | | Interchange Greening Zones |
| | Active Street Frontage | | Super Crossing |
| | York Street Interchange | | |
| | Bus Rapid Transit (BRT) - North South Line | | |
| | Rail Connection & Gamble Street Rail Halt | | |

- Landmarks and Proposals**
1. Clifton House
 2. Clifton Gateway
 3. Gateway Development Opportunity
 4. St. Patrick's Church
 5. University of Ulster
 6. University of Ulster - Proposed Multi-Storey Car Park
 7. Garden behind UU Car Park
 8. Northside Development Brief (expanded)
 9. Belfast Telegraph Building
 10. Belfast Central Library
 11. Library Square
 12. Cathedral Gardens - Existing / Regeneration Strategy Proposed
 13. St. Anne's Cathedral
 14. Creative Hub - Existing Proposal
 15. Innovation District - Regeneration Strategy Proposal
 16. York Street Interchange Greening - Regeneration Strategy Proposal
 17. Gamble Street Rail Halt - Proposed
 18. Underpass Open Space/Recreation - Regeneration Strategy Proposal

Northern Quarter

The Northern Quarter is the most advanced of the SAAs in terms of detailed comprehensive planning. The relocation of the University of Ulster to its new location at the northern end of the city centre has significant beneficial impacts that need to be planned at a more detailed level. A public sector 'strategic advisory group' has been established to facilitate the development and maximise the regeneration benefits of the university relocating to the city centre. As part of this work, a Campus Community Regeneration Forum, involving representatives

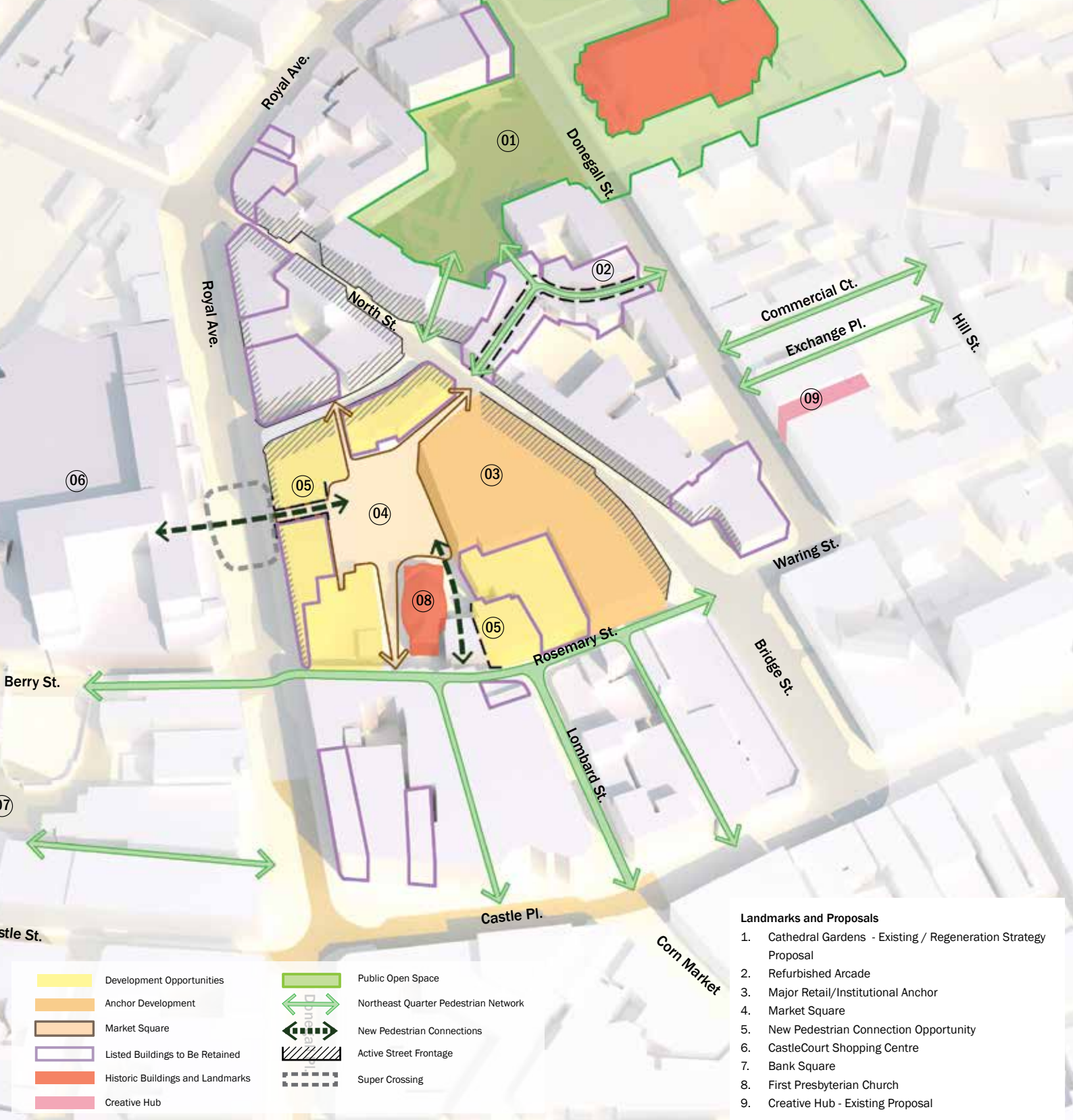
from the university and statutory sector, along with representative community and business organisations has been established. The Forum will oversee a plan for the SAA, the major elements of which are set out in the plan above. The planning area extends from the immediate area around the new campus to make improved connections to the centre, north and west. This also includes the development of a programme of educational, employment and community initiatives.



Western Quarter

The Western Quarter consists of the area along the western edge of the city centre. This area, home to the CastleCourt Shopping Centre, the Smithfield Market and Bank Square, traditional retail streets like Castle Street, and the hub of the black taxi service, has been exhibiting a general retail decline. A comprehensive programme of improvement is required including the revitalisation of CastleCourt, the fostering of the restaurant and

entertainment offer around the newly improved Bank Square, and an imaginative marketing initiative to spark the renewal of the vacant shop fronts along Castle Street and adjacent streets. The plan for the SAA should cover a slightly larger geography as indicated on the plan above to ensure that the area is properly connected to surrounding communities through streetscape and urban design improvements.



North East Quarter including Royal Exchange

The North East Quarter is in need of a major retail or institutional anchor to fill in the gap in the Royal Exchange block on North Street and ignite regeneration in the rest of the area. A complement of smaller retail, cultural, community and residential uses can then be attracted to the remainder of the block. The existing fabric is a good mix of fine heritage buildings suitable

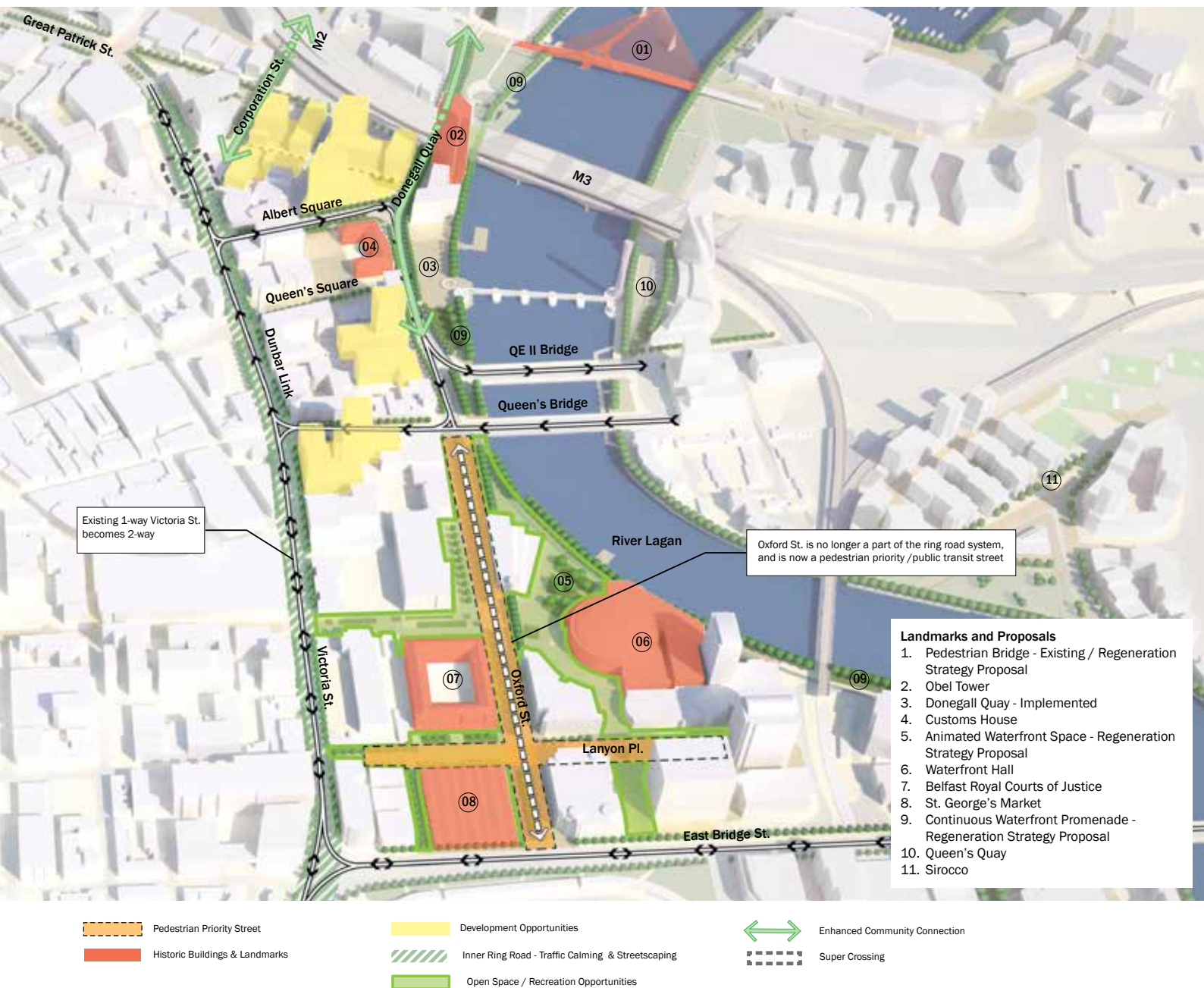
for reuse and low quality structures that can be demolished to make way for new development. The plan for the SAA should set the framework of buildings to be retained, development opportunities, open space opportunities, and key pedestrian connections, particularly to connect the area to CastleCourt to the west and the Cathedral Quarter to the northeast.



Transport Hub

The development of a new transport hub around Great Victoria Street station has been identified in the strategy as one of the key transformative interventions for the city centre. It is critical that the design and development of the hub recognise that it is not simply a transport facility but part of a major city building opportunity. The

SAA sets the transport hub in its wider urban context within the southern part of the city centre, identifying the potential directions for that urban role. Detailed work on the transport hub design is now underway and that should be set within the frame of an SAA plan to ensure the realisation of these wider city ambitions.



Oxford Street and the Eastern Bank District

The regeneration strategy suggests the significant re-working of the one-way system along the west bank of the River Lagan between Albert Square and East Bridge Street in order to achieve a more connected and pedestrian-friendly relationship between the river, the St George's Market, Waterfront Hall (now undergoing expansion) and the balance of the city centre. Central to the proposals is the traffic calming of Oxford Street, to make it a unifying rather than dividing street. To ensure a comparable level of quality in the

public realm on the eastern bank of the river, the design of the river frontage in Queen's Quay and Sirocco also requires careful attention in the SAA. The plan for the SAA should therefore focus on traffic movement, local access, road budgeting, street landscaping and open space design, as well as identifying and promoting the premium development opportunities on the riverfront and recreational, retail/food and event opportunities such a transformative plan could foster.

Appendix: Project Delivery

The table on the following pages goes into greater detail about the delivery of each of the projects. Areas for consideration within the table include:

Timeframe - The timeframe for delivery is dependent on the delivery of other linked projects and the project's ability to deliver jobs. Three timeframes have been identified: 1-3 years for near term projects; 4-8 years for medium term projects; and 9-15 years for long term projects.

Priority - Projects have been prioritised to ensure that jobs are delivered throughout the 15 year duration of the Regeneration Strategy and Investment Plan (the Plan), with an initial boost in the near term to stimulate the economy and ensure that the reduced public sector employment opportunities are replaced by private sector opportunities. High priority projects will therefore be planned, implemented and delivered in the earlier stages where funding allows.

Stakeholders - Responsibility for delivery needs to be confirmed and agreed by the appropriate authorities. They will enlist the support of other key stakeholders when appropriate.

The ownership, delivery and funding of these projects will need further detailed work by Belfast City Council to identify and agree priorities and funding with stakeholders.

Implementing the 8 Policies:

| POLICY INTERVENTION | PROJECTS | TIMEFRAME | PRIORITY | STAKEHOLDERS |
|---|--|---|----------|---|
| Increase the employment population | Develop a comprehensive knowledge economy marketing programme for the city centre with appropriate inducement packages directed at 'near-shoring' of back office functions in the city centre and other potential office sectors | 1-3 years (near-term) | High | Invest NI / SIB |
| | Identify key Grade A office sites in three locations and prepare them for development, including: 1. Traditional office core between Great Victoria Street and Bedford Street 2. City Quays 3. Titanic Quarter | 1-3 years (near-term) | High | SIB / BCC / NI Executive / Harbour Commissioners |
| | Examine the opportunity for selective demolitions of redundant stock to facilitate Grade A office construction | 1-3 years (near-term) | Medium | BCC / Landowners |
| | Consider ways to incentivise the upgrading of existing office space to Grade A standards | 1-3 years (near-term) | Medium | BCC / Local agents / Landlords |
| | Undertake a feasibility study/pilot project to determine how Belfast City Council could de-risk private sector investment in Grade A office construction | 1-3 years (near-term) | High | BCC |
| | Support the creation of a prestige office cluster surrounding the Great Victoria Street Transport Hub by giving the station a presence on the street and identifying and preparing sites for Grade A office development | Feasibility and planning during 1-3 years (near-term) and implementation during 4-8 years (medium-term) | High | BCC / NI Executive / SIB / Harbour Commissioners / Private sector |

| POLICY INTERVENTION | PROJECTS | TIMEFRAME | PRIORITY | STAKEHOLDERS |
|--|---|-------------------------|----------|--|
| Increase the residential population | Identify key residential sites and prepare Market & Development Briefs, in discussion with landowners. If necessary, prepare financial models to underpin and support funding package applications | 1-3 years (near-term) | Low | BCC / Registered Housing Providers |
| | Continue to work with the major educational institutions in and around the city centre to develop a coordinated student housing programme | 1-3 years (near-term) | Medium | BCC / Queen's University / University of Ulster / SIB / Private sector |
| | Develop a strategy and incentives for the adaptive reuse of heritage buildings, with a particular emphasis on student housing | 1-3 years (near-term) | Medium | BCC |
| | Remedy any key deficiencies in the city centre living environment, through improvement of food shopping, day-care, open space and sense of security | 4-8 years (medium-term) | Medium | BCC / Private sector |
| | Identify well supported social housing opportunities along the major roads leading into the centre | 4-8 years (medium-term) | Medium | BCC / Registered Housing Providers |
| Manage the retail offer | Develop a regional planning strategy or urban policy favouring city centre retail activity that could direct large department store/anchor store uses to the city centre | 1-3 years (near-term) | High | NI Executive / BCC |
| | Develop a refreshed Framework Plan for North East Quarter including Royal Exchange that includes a mix of retail and non-retail uses | 1-3 years (near-term) | High | BCC / DSD |
| | Develop a Donegall Place retail management strategy and potentially a retail management body | 1-3 years (near-term) | High | BCC / Business Improvement District |
| | Work with major owners and shopkeepers in and around CastleCourt Shopping Centre on strategies to renew the area's retail offer | 1-3 years (near-term) | High | BCC |
| | Use the opening of the BRT system as an opportunity for a major re-branding of the city centre shopping experience | 4-8 years (medium-term) | Medium | Chamber of Commerce / Hermes / Westfield / Other major retailers |
| | Develop a unified city 'app' that markets and promotes the city centre by providing information on a range of topics including public transport, parking, events, sales, etc as well as coupons, booking opportunities, etc | 4-8 years (medium-term) | Medium | Chamber of Commerce / Private sector / BCC |

| POLICY INTERVENTION | PROJECTS | TIMEFRAME | PRIORITY | STAKEHOLDERS |
|---|---|---|----------|-------------------------------------|
| | Develop community policies and grants that encourage the opening of local, artisanal, 'one-of-a-kind' shops, restaurants and entertainment with an initial focus in the Castle Street/Bank Square area | 4-8 years (medium-term) | Low | BCC / Business Improvement District |
| | Create policy to support the retail offer with complementary uses such as accommodation, food and entertainment | 1-3 years (near-term) | Medium | BCC / Business Improvement District |
| | Develop and implement a city centre parking strategy involving consolidation of car parks and real time advertisement of parking availability | 4-8 years (medium-term) | High | Transport NI / BCC / DRD |
| Maximise the tourism opportunity | Work with George Best Belfast City Airport and Belfast International Airport to understand missing markets and new connections to make Belfast a more competitive option for business conference tourism | 4-8 years (medium-term) | Medium | GBBCA / Visit Belfast / BCC |
| | Identify a significant new tourism destination within the city centre, underpinned by a feasibility study or business case. | 1-3 years (near-term) | High | BCC / NI Tourist Board |
| | Increase the number and draw of large-scale events occurring in Belfast and explore developing a city festival as a member of a growing international circuit | 1-3 years (near-term) | High | NI Tourist Board / BCC |
| | Establish Belfast as a centre of 'adrenalin' recreational tourism | Planning during 1-3 years (near-term) and implementation during 4-8 years (medium-term) | Medium | NI Tourist Board |
| | Work with local organisations to amplify the emerging Belfast brand related to food, music, literary and cultural events, festivals and recreation with the Castle Street/Bank Square District becoming a distinctive complement to the Cathedral Quarter | 1-3 years (near-term) | Medium | Visit Belfast / BCC |
| | Investigate the potential of a new event/exhibition/festival space created by glazing the City Hall courtyard, potentially as Belfast's significant new tourist destination | 1-3 years (near-term) | Medium | BCC / Various |
| | Develop a promotion strategy for Belfast's existing attractions including marketing and better wayfinding between attractions | 1-3 years (near-term) | Medium | Visit Belfast / BCC |
| | Identify and implement some 'quick wins' such as changes to licencing laws and encouraging businesses to open on Sunday mornings | 1-3 years (near-term) | Medium | BCC |

| POLICY INTERVENTION | PROJECTS | TIMEFRAME | PRIORITY | STAKE-HOLDERS |
|---|---|-------------------------|----------|---|
| Create the Region's Learning and Innovation Centre | Support the Campus Community Regeneration Forum to develop a comprehensive outreach programme between the University of Ulster and surrounding communities | 1-3 years (near-term) | High | University of Ulster / BCC / DSD / ESF |
| | Manage the connection between city centre business, cultural, professional and institutional communities to ensure targeted skills training | 1-3 years (near-term) | Medium | Department for Business and Learning |
| | Continue to pursue the proposed "Creative Hub" and establish connections with complementary institutions | 1-3 years (near-term) | High | BCC / Invest NI |
| | Explore the potential for instituting an innovation competition, with a potential focus being a Belfast city "app" | 4-8 years (medium-term) | Medium | BCC / Invest NI / Chamber of Commerce |
| | Contribute to a site options analysis for potential BBC relocation and work closely with BBC and partners to facilitate the preparation of a preferred site if needed | 1-3 years (near-term) | High | BBC (supported by a Project Working Group including UU; QUB; BCC; NI Screen; NI Science Park; and DCAL) |
| | Develop a masterplan and regeneration strategy for the University of Ulster district with a focus on improving community educational connections and fostering the creation of an innovation district | 1-3 years (near-term) | High | Community Campus Regeneration Forum (UU, BCC, DSD, DEL and community stakeholders) |

| POLICY INTERVENTION | PROJECTS | TIMEFRAME | PRIORITY | STAKEHOLDERS |
|--|--|--|----------|---|
| Create a green, walkable, cyclable centre | Develop key bike arterial routes giving access to the centre | 4-8 years (medium-term) | Medium | Transport NI / BCC / DRD |
| | Ensure bike rental and parking facilities are abundant in the city centre | 4-8 years (medium-term) | Medium | BCC |
| | Plan a major new open space in the northern part of the city centre, combining existing open spaces at Buoy's Park and Writer's Square and the land around St. Anne's Cathedral | 1-3 years (near-term) | High | BCC / DSD / DRD |
| | Develop a transformative landscape vision for the river corridor through the centre and extending to the Titanic Quarter | Planning during 1-3 years (near-term) and implementation during 4-8 years (medium-term) | High | BCC / Belfast Harbour Commissions / DSD |
| | Prepare major traffic calming scheme for Oxford Street | Planning during 1-3 years (near-term) and implementation during 4-8 years (medium-term) | High | Transport NI / DRD |
| | Revitalise the public realm of the traditional office core by implementing 'Streets Ahead South' | Feasibility and planning during 1-3 years (near-term) and implementation during 4-8 years (medium-term) | Medium | BCC / DSD |
| | Identify a location for a new public square in the traditional office core | 4-8 years (medium-term) | Medium | BCC / DSD |
| | Complete and transform the Inner Ring Road by: <ul style="list-style-type: none"> • Completing the redefined South Link • Recreating it as a treed urban boulevard where possible, particularly along Great Victoria Street and the Dunbar Link • Implementing 'super crossings' at key intersections | Feasibility and planning during 1-3 years (near-term) and implementation during 4-8 years (medium-term); | High | Transport NI / DRD |

| POLICY INTERVENTION | PROJECTS | TIMEFRAME | PRIORITY | STAKEHOLDERS |
|-----------------------------------|---|-------------------------|----------|---|
| Connect to the City Around | Improve the visual impact and pedestrian connectivity through the M3 and York Street interchange through public art, landscaping interventions and community sports facilities | 4-8 years (medium-term) | High | DRD / BCC |
| | Construct two new pedestrian bridges across the river at City Quays/Odyssey and Gasworks/Ormeau Park | 4-8 years (medium-term) | Medium | BCC / DSD / Belfast Harbour Commissioners |
| | Make improved connections to the Crumlin Road Gaol, the Gaeltacht Quarter and Queen's University through road space reallocation, streetscaping, signage and infill development | 1-3 years (near-term) | High | DRD / BCC |
| | Work with the owners of CastleCourt to improve connectivity and permeability on the north and west sides as part of redevelopment | 4-8 years (medium-term) | Medium | DRD / BCC |
| A Shared Space | Make public spaces in the city centre child friendly through the design of street furniture, inclusion of playgrounds, etc | 4-8 years (medium-term) | Medium | BCC / DSD |
| | Locate facilities for informal sports such as five-a-side pitches in the city centre | 4-8 years (medium-term) | Medium | Sport NI / BCC |
| | Increase water activity on the River Lagan such as boating, floating restaurants, floating art festivals | 4-8 years (medium-term) | Medium | BCC / Belfast Harbour Commissioners |

