

**Democratic Services Section
Legal and Civic Services Department
Belfast City Council
City Hall
Belfast
BT1 5GS**



**Belfast
City Council**

6th April, 2022

MEETING OF CITY GROWTH AND REGENERATION COMMITTEE

Dear Alderman/Councillor,

The above-named Committee will meet in hybrid format, both in the Council Chamber, City Hall, and via Microsoft Teams on Wednesday, 6th April, 2022 at 5.15 pm, for the transaction of the business noted below.

You are requested to attend.

Yours faithfully,

JOHN WALSH

Chief Executive

AGENDA:

1. **Routine Matters**

- (a) Apologies
- (b) Minutes
- (c) Declarations of Interest

2. **Request to present to the Committee**

- (a) Translink - Weavers Cross (Pages 1 - 4)

3. **Regenerating Places & Improving Infrastructure**

- (a) Future City Centre Programme - Vacant to Vibrant Expression of Interest Update (Pages 5 - 14)
- (b) Future City Centre Programme - Tactical Regeneration Programme and 'Grey to Green' Initiative (Pages 15 - 36)

(c) DfI Inconsiderate Pavement Parking - Options Paper: Draft Response
(Pages 37 - 62)

(d) DfI Blue Green Infrastructure Fund - Active Travel Projects (Pages 63 - 68)

4. **Growing Business and the Economy**

(a) Make Yourself at Home - Planning for the future of Tourism (Pages 69 - 134)

(b) Employability and Skills - Update and Workplan (Pages 135 - 144)

(c) Supporting Business Start Up and Growth in Belfast (Pages 145 - 156)

(d) PWC Good Growth for Cities 2022 Report: Taking Action on Levelling Up
(Pages 157 - 206)

5. **Strategic and Operational Issues**

(a) Community Planning Update: Belfast Agenda Review, City Development and
Jobs, Skills and Education Delivery Boards (Pages 207 - 234)

6. **Positioning Belfast to Compete**

(a) External Market Application - Cathedral Quarter Arts Festival Bazaar (Pages
235 - 236)



Subject:	Request to Present – Weavers Cross
Date:	6 April 2021
Reporting Officer:	Cathy Reynolds, Director, City Regeneration & Development
Contact Officer:	Sean Dolan, Senior Development Manager

Restricted Reports	
Is this report restricted?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If Yes, when will the report become unrestricted?	
After Committee Decision	<input type="checkbox"/>
After Council Decision	<input type="checkbox"/>
Some time in the future	<input type="checkbox"/>
Never	<input type="checkbox"/>

Call-in	
Is the decision eligible for Call-in?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

1.0	Purpose of Report or Summary of main Issues
1.1	The purpose of this report is to seek approval for the Committee to receive a Presentation from Translink on the Weavers Cross Regeneration Scheme at its Special Committee Meeting on 27 April 2022.
2.0	Recommendations
2.1	Members are asked to; <ul style="list-style-type: none"> agree to receive a presentation from Translink on the Weavers Cross Regeneration Scheme at the Special City Growth and Regeneration Committee meeting on 27 April 2022.

3.0	Main report
3.1	<p>Members may recall that the City Growth and Regeneration Committee in August 2021 received a presentation from Translink on the Belfast Transport Hub and the wider Weavers Cross regeneration scheme. Representatives provided an overview of building works, together with estimated timeline of completion stages and advised that the main works had been contracted over the next four years with anticipated completion for Summer 2024. The presentation also included social, economic and environmental benefits of the scheme:</p> <ul style="list-style-type: none"> • 8,000+ FTE jobs in Grade A office with FDI potential • 30% uplift in property values and rates • 20m+ per annum public transport passenger footfall with all island connectivity • £25m urban renewal investment • 20 acre brownfield site regeneration • Zero emission public transport by 2040; and • 20,000+ tonnes per year reduction in GHG emissions
3.2	<p>Members will be aware of the ongoing work to deliver the Belfast City Centre Regeneration and Investment Strategy (BCCRIS), as well as the development of A Bolder Vision for Belfast. The Weavers Cross Regeneration Scheme supports the Belfast Agenda growth aspirations and is identified in BCCRIS as one of the key transformative interventions for the city centre within the Linen Quarter Special Action Area and provides an opportunity to develop the placemaking led approach as set out within A Bolder Vision for Belfast.</p>
3.3	<p>DfI granted planning permission for the new integrated Transport Hub in March 2019. The hub forms part of the wider proposed 20 acre Weavers Cross regeneration project and is a flagship project prioritised by the NI Executive. The Weavers Cross Regeneration Scheme aims to regenerate a significant area of land adjoining the Transport Hub and it will be a key feature in efforts to meet the Belfast Agenda and BCCRIS targets.</p>
3.4	<p>During 2021 Translink hosted a range of political parties and business representatives group visits to view the progress of the works ongoing at the Belfast Transport Hub, which included providing updates on the arts and heritage project and the Weavers Cross scheme. It is intended that the Weavers Cross scheme will grow up around the Hub after completion and will provide unique regenerative development opportunities for the area.</p>

3.5	In December 2021 Translink submitted a major outline planning application for Weavers Cross, which followed an extensive community consultation process, that reached more than 50,000 citizens. The proposals were viewed online during the consultation period, alongside displays in the current Great Victoria Street Station and Community workshops.
3.6	Infrastructure Minister, Nicola Mallon cut the first sod on the Belfast Transport Hub (BTH) in Mid-March of this year, and welcomed the social, environmental and economic benefits of the BTH and wider Weavers Cross scheme.
3.7	Members will recall that the City Growth and Regeneration Committee had noted the Council's Hope Street car park as having significant potential to contribute to the comprehensive Weavers Cross Regeneration scheme and approval was given by SP&R in November 2019 for the inclusion of this within Translink's Master planning considerations.
3.8	There is continued engagement between officers from City Regeneration & Development and Translink in relation to the Weavers Cross and Transport Hub regeneration proposals including officer representation on the Belfast Transport Hub Programme Board which focus covers the Transport Hub and wider Weavers Cross development scheme.
3.9	Translink would like to attend the Special meeting of the City Growth and Regeneration Committee on 27 April 2022 in order to update Members on its proposals for the Weavers Cross scheme.
3.10	<u>Financial & Resource Implications</u> None issued with this report.
3.11	<u>Equality or Good Relations Implications/Rural Needs Assessment</u> None
4.0	Appendices – Documents attached
	None

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Subject:	Future City Centre Programme: Vacant Premises Update
Date:	6 th April 2022
Reporting Officer:	Cathy Reynolds, Director of City Regeneration & Development
Contact Officer:	Niamh Mulrine, Regeneration Project Officer / Richard Griffin, Development Manager

Restricted Reports	
Is this report restricted?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If Yes, when will the report become unrestricted?	
After Committee Decision	<input type="checkbox"/>
After Council Decision	<input type="checkbox"/>
Some time in the future	<input type="checkbox"/>
Never	<input type="checkbox"/>

Call-in	
Is the decision eligible for Call-in?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

1.0	Purpose of Report or Summary of main Issues
1.1	To update Committee on progress of the Vacancy programme, and in particular the proposed pilot capital grant programme, 'Vacant to Vibrant' as reported to CG&R Committee in November 2021, including the emerging findings of the recent Eol process, and to agree next steps for the grant process.
2.0	Recommendations
2.1	The Committee is asked to:

	<ul style="list-style-type: none"> • Note the update in relation to the overall Vacancy Programme including data; the 'matchmaking' service to assist potential occupiers; a revised Retail & Leisure Performance Strategy; targeted acquisition and the 'Vacant to Vibrant' grant scheme as detailed below. • Note the outcomes of the Expression of Interest regarding the proposed 'Vacant to Vibrant' pilot capital grant scheme, including the potential demand for both capital funding and wrap around business support services. • Note that officers will continue to establish demand for the grant programme and the requirements for wrap around support services (for example, business plan preparation) and that a future report will be brought forward should additional services be required. • Agree that the grant application process is due to open May / June 2022 with further updates to be brought back to this Committee. • Note that officers will continue to explore other funding opportunities to support the capital grant programme, given the anticipated level of interest. • Note the launch of the Department of Finance's 'Back in Business' scheme offering businesses a 50% rates discount for up to two years if they occupy a vacant shop unit.
3.0	Main report
3.1	<p><u>Background</u></p> <p>Members will recall that a programme of work has been developed in response to the rise in the number of vacant properties across the city centre. Given the range of global and local factors contributing to vacancy, and taking into account approaches from best practice across the UK and Ireland, a 'toolkit' approach has been taken comprising a number of forms of intervention, including, a mix of grant support to third parties and Council-led or delivered projects, such as targeted acquisition of property.</p>
3.2	<p>An overview of this work was presented to CG&R meetings in October and November 2021, and work has continued on developing a number of strands:</p> <ul style="list-style-type: none"> • Data: Vacancy data work has been progressed to align multiple existing data sources within Council, and to explore the potential to add value through analytical tools such as the 'Economic Analyser'. • Retail and Leisure Performance Strategy: Officers are working with Pragma Ltd who have been commissioned to review their 2018 study and produce a detailed report containing the evidence-base in relation to existing Retail / Leisure performance in the city centre, gaps, potential demand, challenges and opportunities. This will inform both strategy and implementable recommendations. This report will be completed in April and presented to a future meeting of the CG&R Committee.

	<ul style="list-style-type: none"> • Matchmaking Service: Procurement is underway to appoint a commercial agent (on a pilot basis) to work alongside officers to provide a 'matchmaking' service that will provide dedicated and expert resource to aligning business opportunities and demand from various sectors with potentially suitable vacant space. • Targeted Acquisition: completion of 2 Royal Avenue acquisition, and review of other opportunities for direct Council intervention/delivery. A report will be brought back to Committee in the near future on 2 Royal Avenue. • Capital Grant Pilot Programme - 'Vacant to Vibrant': alongside the above actions, a grant programme has been developed to incentivise uptake of vacant properties in the city centre - further detail outlined below.
3.3	<p>Capital Grant Pilot Programme - 'Vacant to Vibrant'</p> <p>Reports were brought to the City Growth & Regeneration Committee in October and November 2021, and in November 2021 Members approved the development of a pilot city centre capital grant scheme, 'Vacant to Vibrant'. While this scheme is focused within the city centre in order to respond to need and maximise impact with limited funding, a further programme was also agreed by Committee - 'Supporting Vibrant Business Destinations', which will provide a complementary tailored approach to support businesses outside the city centre along the arterial routes. As reported to this Committee in February 2022, £475k of funding has been secured from DfC and Officers are continuing to work through the programme with future reports to be brought to this Committee at the relevant points.</p>
3.4	<p>Through the 'Vacant to Vibrant' capital grant it is proposed that property owners, businesses and organisations wishing to renovate or repurpose a vacant space could apply. Grants would cover the following capital costs:</p> <ul style="list-style-type: none"> • smaller financial support to pop-up shops and meanwhile test space; • larger grants to encourage uptake of vacant units; • external capital works to façades to improve look and feel of the high street; • internal capital works to make a vacant property fit for purpose and support long term occupation; • diversification of unoccupied space to help existing businesses survive.
3.5	<p>As previously agreed by Committee the pilot grant would seek to support local independent businesses and SME's, social economy businesses and creative and cultural organisations that would provide a unique or distinct offer for the city centre, and would prioritise support for:</p>

	<ul style="list-style-type: none"> • vacant ground floor units in the primary retail core • properties in areas where vacancy is above average • properties which are visually prominent • proposals for significant external improvements, particularly where the property has fallen into disrepair due to an extended period of vacancy.
3.6	<p>As previously presented to Committee funding brackets have been proposed based on floorspace (up to a maximum grant of £25,000), and applicants would be expected to contribute a minimum of 10% match funding, while also demonstrating quality assurance and clear commercial viability, evidenced through a robust three-year business and financial plan. The funding brackets outlined are for up to £15k for applicants seeking for a space with a footprint of up to £150 sqm, £25k for a floor space above 151 sqm, and up to £2.5k for applicants seeking to test space in the city centre for 1 year or less (min 4mths).</p>
3.7	<p>In order to test the parameters of the scheme and to gauge interest generally as well as the types of proposals it might attract, businesses, organisations and property owners were encouraged to complete an Expression of Interest to help shape both the grant scheme, and the level of support services which may be required alongside it. The Expression of Interest process ran from 31st January to 28th February 2022. While the submissions are still being reviewed, initial analysis of responses has indicated that the level of interest for the grant is likely to exceed the currently available funding of £700,000 over the identified two-year period.</p>
3.8	<p>Summary findings from the EoI include:</p> <ul style="list-style-type: none"> • 145 expressions of interest submitted; • Of this total, 15 were submitted by property owners, with the remainder from businesses/organisations; • Of the submissions by businesses/organisations, c50% do not have a business plan in place, 80% identified needing support to find a suitable property and 75% have stated that they need leasing advice; • Approximately 33% of the submissions by businesses/organisations were from cultural sector, with an additional 5% from Voluntary/Community/Social Enterprise, 23% were from hospitality, 10% retail and 7% from Health and Leisure; • In terms of space required, 56% need 150 sq metres or less and 36% need 150 sq metres or more, with 8% having not yet determined what space they would require; • 43% of businesses/organisations are seeking space for one year or less, 51% are seeking space for 2-5 years and 6% are seeking space for 5 years or more.

	<p>It is also anticipated that there will be further interest at application stage as interested parties develop proposals in preparation for the grant going live.</p>
3.9	<p>It is also worth noting that while a number of those seeking support will be eligible for existing Council business support programmes (such as support to develop a business plan), these programmes may not be suitable for certain organisations. Where possible, officers are seeking to use existing council support for businesses to ensure that applicants have access to relevant technical and specialist support.</p>
3.10	<p>The EoI also gathered information regarding demand for various forms of support for businesses seeking to occupy a vacant space, and work is ongoing to fully consider the range of wrap-around support required.</p>
3.11	<p>It should be noted that while there is considerable demand for the grant, there are a significant number of responses to the Expression of Interest that refer to proposals not yet sufficiently developed to avail of this scheme. Some will require support to develop a business plan and financial forecasting to prove they can sustain themselves within a premises or will need assistance to identify a suitable property.</p>
3.12	<p>Many from the cultural sector have indicated that they are seeking maker space and their property requirements also may not align with the parameters of this grant, which will primarily seek to occupy and activate vacant ground floor space in prominent areas of the city centre. Further work is however being undertaken across City Regeneration & Development, Tourism, Culture, Heritage and Arts and Enterprise & Business to consider how support can be provided to this sector.</p>
3.13	<p>The feedback on the EoI was positive in terms of the parameters as set out within the EoI and to this end Officers are continuing to develop the scoring criteria to bring forward the applications to be delivered within this funding allocation, with a focus on the parameters in terms of location as identified within item 3.5 of this report as well as an assessment of the applicant's demonstration of quality assurance and clear commercial viability, evidenced through a robust three-year business and financial plan. In the case of temporary pop-up proposals the applicants will be required to provide evidence of commercial viability for the duration of their intended lease (min 4mths to 1yr). Further information on the proposed eligibility criteria for the assessment and award of the grant scheme is as per attached Appendix 1.</p>

3.14	It is proposed that, subject to Members approval, the capital grant will open in May / June 2022 and that the application process will remain open for two years or until the available funding has expired. It is proposed that the grant will be allocated on a first come, first serve basis, provided that the application achieves a minimum quality threshold of 75% in the scoring criteria. Where applicants have indicated that they need support in finding a suitable location or leasing advice they will be able to avail of the Council 'matchmaking' service referenced above which will include support via a Commercial Agent under the Vacancy Programme.
3.15	Members may also be aware that the Finance Minister has recently launched the 'Back in Business' scheme offering businesses a 50% rates discount for up to two years if they occupy a vacant shop unit. A previous version of the scheme, that expired in 2017, supported over 550 businesses across Northern Ireland. The scheme is due to open for applications in May 2022 and will grant a discount for 24 months beginning on the day the unit becomes occupied.
3.16	The timing of the scheme will complement the 'Vacant to Vibrant' grant as an additional incentive for new businesses and organisations seeking to occupy space in the city centre. Through our Expression of Interest for the 'Vacant to Vibrant' scheme respondents identified 'Access to Capital' as the most common challenge to occupying vacant space in the city centre; this was closely followed by 'Rent' and 'Rates', with around 50% highlighting rates as one of the main obstacles. It is worth noting however that the 'Back in Business' scheme only applies to premises which were previously used for retail purposes, and if the property has never been occupied before then it must be used for retail purposes when it becomes occupied.
3.17	Financial & Resource Implications
	As previously reported to Committee in October and November 2021 a two-year pilot of £350,000 p.a. ie total £700,000 is proposed, funded via the Covid Response Reserves, to enable the delivery of a capital 'Vacancy Grant Programme'.
3.18	Equality or Good Relations Implications / Rural Needs Assessment
	An equality Impact Assessment will be undertaken on the grant prior to allocation of funding.
4.0	Appendices – Documents attached
	Appendix 1: 'Vacant to Vibrant' Pilot Capital Grant Process

Appendix 1

Vacant to Vibrant Eligibility Criteria

Grant Programme Context

Under the Future City Centre Programme 'addressing vacancies' has been identified as a key strand in increasing footfall, increasing vibrancy, addressing dereliction and reducing the level of vacancy within the Primary Retail Core (PRC) in Belfast City Centre. over recent years the level of vacancy within the Primary Retail Core has increased 2% every year since 2019 and is currently at 23.41%, with the rest of the city centre (outside PRC) currently at 21.3%. Although the pandemic has accelerated the trend across High Streets in the UK and Ireland Belfast already had a higher-than-average vacancy level when compared to comparable cities as evidenced within the Pragma Report 2019 with vacant ground floor premises in multiple locations, including along established and resilient streets within the city centre.

This grant programme is aimed to promote the reanimation and reactivation of these premises, supporting local independent businesses and SME's, social economy businesses and creative and cultural organisations through capital grant support to establish new businesses, to expand existing businesses or to address long standing dereliction aimed at bringing forward active ground floor usage. Successful applicants will need to demonstrate how the funding will contribute to the **key objectives** of the grant, through one or more of the following:

- Occupy a vacant premises and bring it back into permanent (2+ years) or temporary (meanwhile or pop up) use
- Encourage the establishment of businesses/organisations in the city centre and support existing businesses to diversify into unoccupied space
- Make external and internal improvements to vacant premises to support long term occupation
- Enhance the streetscape with high quality external works and activation of ground floor space
- Contribute to the vibrancy of the city centre and increase footfall in the area
- Make the city centre more diverse and attractive with unique/distinct businesses/organisations

Grant Proposal

The grant scheme will provide capital support to bring forward sustainable opportunities within the city centre.

The grant process will provide capital grant support towards;

- smaller financial support to pop-up shops and meanwhile test space;
- larger grants to encourage uptake of vacant units;
- external capital works to façades to improve look and feel of the high street;

- internal capital works to make a vacant property fit for purpose and support long term occupation;
- diversification of unoccupied space to help existing businesses expand.

Funding will awarded based on the quantum of floor space to be activated, as outlined below, and subject to a minimum of a 10% contribution from the applicant;

Larger grants to encourage uptake of vacant units:

Grant 1. Applicants seeking funding for a space with a footprint **up to 150 sq metres** could access a grant of up to £15,000 with 10% match funding from business/occupier/property owner.

Grant 2. Applicants seeking funding for a space with a footprint **above 151 sq metres** could access a grant of up to £25,000 with 10% match funding from business/occupier/ property owner

Smaller financial support to pop-up shops and meanwhile test space:

Grant 3. Applicants seeking to test space in the city centre for **1 year or less (minimum 4 months)** can access a grant of up to £2,500 with 10% match funding from business/occupier/owner.

All capital spend must be procured and delivered in accordance with BCC procurement guidelines and costs will be reimbursed following receipt, and clarification, of incurred spend.

Process

Application, administration, and awards will be managed by City Regeneration & Development division in conjunction with the Place & Economy Department and Physical Programmes Department. Existing council grant management and due diligence process and oversight will apply.

Criteria

Eligibility Criteria for the grant scheme will adhere to council regulation for council investment and will include any additional criteria where applicable or associated with the contribution of capital resource. The following eligibility criteria will be applied on a pass/fail basis;

- The scheme will be open for local independent businesses and SME's, social economy businesses and creative and cultural organisations;
- The property must be within the Belfast city centre boundary.
- The property must not have been in occupation for a period of 12 months at the time of application (properties that have been occupied by temporary meanwhile use/pop ups are acceptable).
- Grants will be allocated one per property only.
- Proposals should seek to activate ground floors units. Proposals activating upper floor units only will not be eligible unless they can clearly demonstrate that the proposal will have a meaningful and measurable impact on the street character and vibrancy.

- Proposals should seek to make an impact on streetscape with high quality external works
- Applicants will be responsible for leading and conducting relevant stakeholder engagement: applications must demonstrate engagement to date in securing and supplying agreement from all directly affected stakeholders, including landlord and adjacent businesses or residents.
- Applications from businesses/occupiers will need to provide evidence of property owner agreement (written consent) and lease /proposed lease arrangements for a minimum of two years (excluding grants for test space). In addition, a three-year business and financial plan will need to be provided. Business plans will be assessed, and quality assured by Council. Applications must clearly identify benefit for the area they are locating in, ensuring they do not duplicate an existing offer that could displace a nearby business.
- Applicants need to demonstrate an ability to deliver the scheme within 6 months of Letter of Offer.
- Applicant will be required to gain the relevant statutory permits or permissions: applications must outline the relevant permissions required and confirmed status.
- Applicants must have evidence of an Equal Opportunities policy

Where applicants have indicated that they need support in developing their business plan they will be able to avail of the Councils existing wrap around support services, subject to eligibility. Where applicants have indicated that they need support in finding a suitable location or leasing advice they will be able to avail of the Council supplied Commercial Agent under the Vacancy Programme.

Who is eligible to apply

Property Owner/Occupier: Through this capital grant, both property owners and businesses/organisations wishing to renovate or repurpose a vacant space can apply. Please refer to the list of non-eligible businesses and organisations below. Organisations must be an existing, registered business, or social enterprise. They must be able to provide appropriate proof of registration (eg companies house; or HMRC self-assessment number). Or, a not-for-profit / community organisation who are a constituted organisation and have been actively operating for at least the last 3 months as the date of applications.

Location: Council wish to pilot this grant incentive within the defined boundary of the city centre only. Project proposals outside of the boundary will not be considered. We are seeking to target ground floor vacancies and are therefore keen to support project proposals for ground floor units but will also consider proposals where the business/organisation's ground floor activities extend into upper floor units. Projects proposing to target upper floor units only will not be considered unless

they can clearly demonstrate that the proposal will have a meaningful and measurable impact on the street character and vibrancy.

Assessment Criteria

The following assessment criteria will be applied to the applications

Title	Description
Affordability	Business Plan and Financial Forecasting Assessment
Definition and Deliverability	Definition of the project is in line with the scheme's aim and objectives, eligibility criteria and capital expenditure guidance. Statement of deliverability and consideration of all necessary approvals (landowner; planning etc.)
Property Proposal	Location and activation of vacant property. Commitment and evidence of long-term operation and maintenance of the capital works. <i>Note Belfast City Council will not be responsible for the any maintenance and management costs post-project completion</i>
Project Proposal	Evidence of efforts made to ensure the investment will improve the area and be a long-term success

Funding Allocation

It is proposed that the funding will be allocated to successful applicants as below;

Property Owner	Tenant	Property Owner with no confirmed Tenant
70% Upfront	70% upfront	60% upfront
30% Completion	30% Completion	40% Completion and Tenant secured



Subject:	Future City Centre Programme- Tactical Regeneration & 'Grey to Green'
Date:	6 th April 2022
Reporting Officer:	Cathy Reynolds, Director of City Regeneration and Development
Contact Officer:	Richard Griffin, Development Manager

Restricted Reports

Is this report restricted?

Yes

☐

No

☒

If Yes, when will the report become unrestricted?

After Committee Decision

After Council Decision

Some time in the future

Never

☐
☐
☐
☐

Call-in

Is the decision eligible for Call-in?

Yes

☒

No

☐

1.0	Purpose of Report or Summary of main Issues
1.1	The purpose of the report is to update Members in relation to a proposed Tactical Regeneration Programme; the Entries Phase 2 scheme; a 5Cs Revitalisation scheme and a 'Grey to Green' initiative for the city centre and linking to surrounding communities.

2.0	Recommendations
2.1	Members are requested to: <ul style="list-style-type: none"> (i) Note the initial work to develop a 'Tactical Regeneration Programme' aligned to A Bolder Vision, and approve its further development to progress feasibility of potential future projects, including an initial focus on the Great Victoria Street area; (ii) Note the DfC offer of capital funding to deliver the '5Cs Revitalisation' project, and approve Council support for the project by way of progressing design and delivery;

	<p>note also the opportunity this presents for Castle Street with a potential further phase of work during 2022/23;</p> <p>(iii) Note that Council have received and accepted via the Capital Letters of Offer process a LoO from DfC in respect of the Entries Phase 2 project and that work is progressing in line with this to deliver the scope of works included within the Entries Phase 2 scheme;</p> <p>(iv) Note the opportunity to deliver on a 'Grey to Green' initiative for the city centre and linking to surrounding communities and approve the approach to developing potential future projects and funding applications.</p>
3.0	Main report
3.1	<p>Background</p> <p>The Future City Centre (FCC) Programme has been developed in line with the Belfast Agenda, the Inclusive Growth Strategy and the Cultural Strategy and has been informed by the Belfast City Centre Regeneration and Investment Strategy. The FCC Programme sets out a framework to deliver on priorities including diversification of uses, enhanced connectivity, investment, and inclusive economic and cultural growth although it is recognised that it needs to remain agile to deal with the ever-changing challenges of the city centre. The FCC programme has six cross-cutting pillars and includes 'tactical regeneration' as a key area of work that has potential to make a significant contribution, alongside other interventions, in helping to achieve the overall objective of a reimagined city centre.</p>
3.2	<p>Tactical Regeneration represents an opportunity to deliver against the principles and objectives of A Bolder Vision, by delivering shorter term improvements that enhance and better connect spaces and places throughout the city centre, while also testing temporary interventions that can shape and inform delivery of permanent public realm, regeneration or infrastructure projects.</p>
3.3	<p>Tactical Regeneration</p> <p>'Tactical Regeneration' is about being pro-active to deliver simple and creative interventions that are relatively quick and low cost. It is a form of temporary place-making that help address issues of vacancy and dereliction and to test potential interventions that can inform long term change and act as a catalyst for future permanent regeneration projects. It represents an opportunity to deliver against the principles and objectives of A Bolder Vision, by delivering shorter term improvements that enhance and better connect spaces and places, while also</p>

	testing temporary interventions that can shape and inform delivery of permanent public realm, regeneration or infrastructure projects.
3.4	It can also enable better engagement with property owners, agents and others to develop a better understanding of the barriers to delivery and work in partnership to improve specific areas.
3.5	Tactical Regeneration can work on a number of levels, with a variety of outputs, but with a consistent objective to produce outcomes that are well curated, site sensitive and engaged, with a view to making a site or space a more people friendly place while influencing longer term use. Tactical Regeneration is intended to react quickly to immediate need, and where appropriate, go beyond the traditional concept of 'space' (for example, street or park) and also explore opportunities to utilise vacant sites or units for a range of uses.
3.6	<p>There are two main forms of tactical regeneration that Council, working with others can deploy:</p> <ul style="list-style-type: none"> i. 'Tried and Tested'- a back to basics, replicable approach which includes deep cleans, general painting, greening, lighting etc. ii. Opportunity to 'Try and Test'- a site specific approach involving small to medium scale interventions in the public realm, vacant sites, or buildings. These interventions are intended to instigate and encourage positive use, opportunities for civic engagement and participation, for urban prototyping and experimentation. Outputs can include parklets, bespoke site-specific artworks, and features to create destination points, considered and designed venues/locations to facilitate and host meanwhile social, cultural and economic activities.
3.7	Working in partnership with multiple stakeholders, Council have delivered a number of recent initiatives that have included elements of Tactical Regeneration, some examples below and as attached at Appendix A;
3.8	<p><u>Belfast Entries Project</u></p> <p>While this project includes large and complex interventions intended to be in place for several years, such as bespoke feature lighting, it also involved the curation of a number of smaller scale elements, that collectively have significant impact within individual entries, and across the scheme as a whole. Through a general refresh of the area, coupled with bold artworks and lighting schemes, the Entries Programme has added interest and contributed to</p>

	<p>wayfinding through the city centre, while promoting the heritage and culture of the entries themselves and have acted as destinations in their own right. Members may also recall that the Entries project won an award in the public-private partnership category at the all-Ireland Urban Land Institute and CBRE Excellence in Placemaking Awards for 2021.</p>
3.9	<p><u>Marquis Street and Other Examples</u></p> <p>Officers worked with local traders, designers, and craftspeople to complete an upgrade to Marquis Street, a key connection from Castle Street into the city centre. Works included general painting, cut and clear of overgrowth, festoon lighting, interpretive panel (to tie in with the Entries and Lanes initiative) and a site-specific artwork. Local businesses have also sought to utilise the enhanced environment, including by securing pavement café licences to enable active use of outdoor space.</p>
3.10	<p>There are other examples of schemes of varying scale and complexity which have been delivered by Council, including a building wrap around vacant properties pending development at Lower Garfield St; a shutter painting scheme in Fountain St; interactive lighting of properties in Castle St and Brunswick St and the temporary lighting installation at the former Bank of Ireland building on Royal Avenue. While generally involving larger scale interventions, the DfC Covid-19 Revitalisation programme has also included elements of tactical regeneration, such as, Union St, Adelaide St, Brunswick St, the Linenhall parklets and the Business Cluster & Community Grant projects.</p>
3.11	<p>Tactical Regeneration Programme</p> <p>Officers propose to develop a Tactical Regeneration Programme that will enable a more strategic approach to be taken to the prioritisation and development of individual projects as part of a wider body of work. This approach would support the development of a 'pipeline' of projects tailored to specific locations and circumstances, but, curated and delivered to a consistently high standard that reflects and supports other initiatives and wider city development objectives.</p>
3.12	<p>By working up individual schemes in this context Council would be better placed to capitalise on funding opportunities that often arise at short notice and with limited timescales for delivery, often requiring delivery in line with 'in year' funding requirements from central government. The approach proposed would enable Council to respond quickly with projects that have been developed (for example, outline design / business case where applicable).</p>

3.13	In relation to the proposed development of a tactical regeneration programme, there are a number of emerging project opportunities as below and identified in Appendix B:
3.14	<p><u>5C's Revitalisation Scheme</u></p> <p>Through Developer Contributions Council are working with DfC to develop this public realm scheme across a number of city centre streets - Chichester Street (including sections of Montgomery St & Upper Arthur St), Callender Street, College Street and College Court. Officers have also worked with DfC to identify potential short-term interventions that could be delivered within the project area in advance of the main scheme, and which would address issues outside the scope of a traditional public realm scheme, including treatment of dead frontages, interpretation and wayfinding, feature lighting and additional greening. The interventions would bring short-term benefit to these streets, ahead of the delivery of larger scale permanent works, such as, footway realignment and resurfacing (Appendix B).</p>
3.15	DfC have identified an opportunity to support this initiative with capital funding and, pending receipt of a Letter of Offer, approval is sought to support design and delivery of this scheme.
3.16	As the 5Cs project area is immediately adjacent to Castle Street, there is also an opportunity for Council to consider extending a wider programme of improvements to take in Castle St and to deliver as a further phase of work during 2022/23 as part of the wider proposed Tactical Regeneration Programme.
3.17	<p><u>Great Victoria Street /Shaftsbury Square</u></p> <p>The decline in this area has been raised by this Committee and a number of other Stakeholders on a number of occasions, referencing the period of decline in recent years, with a number of prominent vacant and derelict properties alongside a poor quality of public realm, particularly on Great Victoria Street. Whilst certain businesses have sustained a presence in the area and continue to make a positive contribution in terms of well-maintained active frontages, there are a number of vacancies and the wider area is in need of significant intervention. It should be noted that there are several development proposals progressing through the planning process in the wider area, and major public sector placemaking and infrastructure projects like Belfast Streets Ahead 5 and BRT 2 also have the potential to have a transformative impact.</p>
3.18	However, the timescales associated with emerging or committed public and private projects in this area are lengthy, and in some cases uncertain, and there is a growing consensus

	<p>among local stakeholders that there is a need for shorter term action. DfC had convened a Shaftesbury Square Masterplan Group, while a further group comprising a mix of private sector business and other interests, including Council officers, Translink, NIHE, DfC and DfI has more recently formed by way of a 'South West Quarter Stakeholder Group' in relation to issues and opportunities across the wider 'South West Quarter' area, which takes in Great Victoria Street, Shaftesbury Square, Dublin Road and Sandy Row. Both of these groups acknowledge the longer-term opportunities in the area but have expressed support for Council, working with other partners, to bring forward tactical regeneration proposals to enhance the area in the short term.</p>
3.19	<p>Officers are proposing that a tactical regeneration scheme is worked up for part of this area initially and whilst the detail needs to be developed it could include a combination of minor works to building frontages, while also taking advantage of generous footway widths along Great Victoria Street through measures, such as, removal of street clutter and introduction of soft landscaping and greening opportunities where possible (Appendix B). It is proposed that a scheme be developed that focuses on Great Victoria Street (east and west sides, from Bruce St to Donegall Rd), as a priority given the condition of this area. Potential interventions for other parts of Shaftesbury Square will be identified alongside this work, informed by the potential for funding. DfC have indicated that funding may be available in the 22/23 financial period if projects can be developed up into a business case status. There is also potential for funding from other stakeholders within this South West Quarter Stakeholders Group. The scale and timeframe of funding is yet to be determined however it is proposed to develop a suite of potential interventions within this area that can be tailored to suit the available funding.</p>
3.20	<p>The approach to these interventions will reflect and test the placemaking objectives of the 'Civic Spine' as set out by A Bolder Vision, which is currently being considered in part through Belfast Streets Ahead 5 and Belfast Streets Ahead 3. The BSA 5 team have engaged in recent Bolder Vision workshops, and are currently developing traffic modelling scenarios within the project area, including for Bedford Street, Dublin Road and Great Victoria Street. This modelling will inform further concept design work for BSA 5 and future updates will be brought into this Committee as the plans are developed.</p>
3.21	<p>This report is seeking approval to further develop the feasibility of a Tactical Regeneration Programme, which would include progressing outline designs for the Great Victoria St and</p>

	Castle Street areas. Officers will continue to identify further areas that would benefit from similar types of intervention, for example, Royal Ave.
3.22	Further reports will be brought to this committee and SP&R as appropriate as projects are identified and developed, and as funding opportunities for the capital delivery of these emerge.
3.23	<p><u>Entries Phase 2</u></p> <p>Based on the success of the first phase, alongside significant support from city stakeholders, Phase 2 of Belfast Entries was included within the Belfast City Recovery Revitalisation Programme. The reopening of Sugarhouse Entry is a core element of this work, and DfC propose to fund the main works in this location, in addition to in-kind contributions committed by NI Water and the private sector. Phase 2 of the Entries will also include a refresh to Pattersons Place, College St Mews, Exchange Place, Wellington St and High St Court (Appendix C).</p>
3.24	Reopening Sugarhouse Entry will provide an alternative connection between the retail core, via Pottinger's Entry, to the Cathedral Quarter via Waring Street, and will complement the forthcoming High Street public realm and cycle scheme. The scheme will deliver on the Belfast City Centre Regeneration & Investment Strategy priorities by improving connectivity and the city living experience, driving regeneration and creating a welcoming, safe and vibrant centre, and supports the aims of A Bolder Vision. Works in this location will be subject to approval from DfI in relation to re-opening this entry.
3.25	In addition to the funding provided through the Covid-19 Revitalisation Programme and, working in collaboration with DfC, Officers have submitted a business case and received a Letter of offer for additional capital funding to deliver the scope of works included within the Entries Phase 2 scheme.
3.26	<p>'Grey to Green'</p> <p>Further to the report on 'City Centre Open Spaces' brought to Committee in August 2021 which updated members on a number of strands of city greening work, officers have undertaken a review of open space and other 'greening' opportunities within the city centre linking to surrounding communities. This work identifies opportunities for improvements to existing, or creation of new, green spaces, with a particular focus on connecting routes with adjoining communities. While in some instances these 'grey to green' improvements can be</p>

	delivered as a component of larger scale capital projects, or as standalone schemes themselves, there is also an opportunity to bring short term benefit and pilot innovative approaches through tactical regeneration projects such as those referred to in this report.
3.27	It is proposed that the incorporation of soft landscaping / city greening forms a key component of the Tactical Regeneration Programme that could include a range of responses to different typologies of space across the city, from an under-utilised space in the primary retail core, to an edge of city centre residential area. The delivery route for these types of improvements will vary and will often involve close co-working with other public, private and community partners. There is an opportunity, through the Tactical Regeneration Programme and more specifically as part of a 'Grey to Green' initiative to develop this area of work with a view to identifying a range of potential interventions and exploring deliverability with other stakeholders and funders.
3.28	There are opportunities within the city centre to work with the private sector and BIDs and to work with community stakeholders through initiatives like the 'Garden Grid' which has involved a number of community organisations working together to co-design green solutions for a network of sites in the inner north area. Led by Ashton, this project proposes to bring multiple small sites into use and link them into a 'grid' of spaces under a common land management organisation as a social enterprise plant nursery. The proposal includes use of 'pop-up' containers and mobile planting techniques to allow for a variety of sites to be adapted quickly with minimal capital. As well as making productive use of spaces, the project aims to work with residents on issues of health and well-being, street safety and food growing initiatives. Officers have been engaging with Ashton and others in relation to this initiative and will bring a further report back to Committee in the near future.
3.29	Co-working across a number of Council departments will also be required to ensure alignment of workstreams including 'Clean, Green, Inclusive & Safe', the Resilience Strategy, the Cultural Strategy, the Belfast Open Space Strategy, the One Million Trees and 'Urban Forest' initiatives.
3.30	While officers have carried out an initial analysis to identify potential sites where greening 'Grey to Green' interventions could be brought forward, there is a need to further assess feasibility and deliverability in order to develop a series of priority projects which could then be designed and costed. Funding options and future delivery and management models could then be considered against these more detailed project proposals, and further reports

	brought to CG&R and SP&R as appropriate. Approval is therefore sought to develop the 'Grey to Green' programme to business case status with an objective to apply for funding from a number of sources, including DfC and DfI.
3.31	Financial & Resource Implications
	<p>Tactical Regeneration Programme - £100,000 will be met from approved City Regeneration and Development Budget for 22/23 (Future City Centre Programme budget line).</p> <p>5Cs Revitalisation Project – DfC offer of capital funding of £162,000. £20,000 will be met from approved City Regeneration and Development Budget for 22/23 (Future City Centre Programme budget line).</p> <p>Entries Phase 2 – DfC capital funding of £150,000.</p> <p>Grey to Green Programme - £30,000 will be met from approved City Regeneration and Development Budget for 22/23 (Future City Centre Programme budget line).</p>
3.32	Equality or Good Relations Implications/Rural Needs Assessment
	<p>The Future City Centre Programme is a high-level regeneration plan. The significant projects taken forward within the plan will be screened in their own right by the lead delivery division.</p> <p>Where appropriate, emerging work strands will be individually screened for Equality and Good Relations Implications/Rural Needs Assessment.</p>
4.0	Appendices – Documents attached
	<p>Appendix A - Tactical Regeneration: Project Examples</p> <p>Appendix B - Tactical Regeneration: Emerging Projects</p> <p>Appendix C - Entries Phase 2: Project Area</p>

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Belfast

Tactical Regeneration Programme
Appendix 1- Project Examples



Tactical Regeneration

Quick Low Cost High Impact

Recent CRD interventions

Marquis St

- Working with local property owners
- Engaging local traders, designers, and craftspeople
- Works included general painting, cut and clear of overgrowth, festoon lighting and interpretive panel
- Tie in with the Entries project



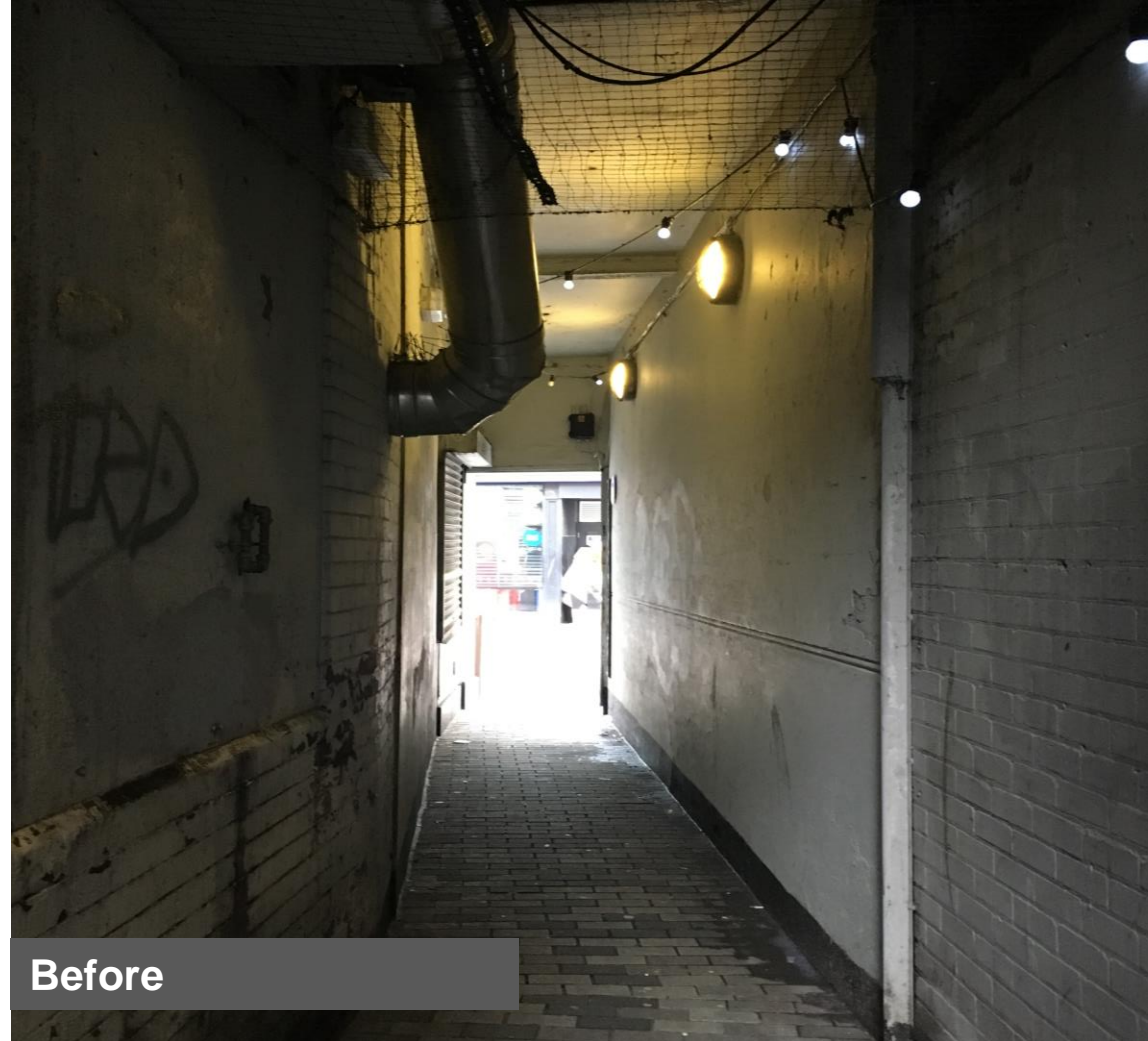
Tactical Regeneration

Quick Low Cost High Impact

Recent CRD interventions

Entries Project

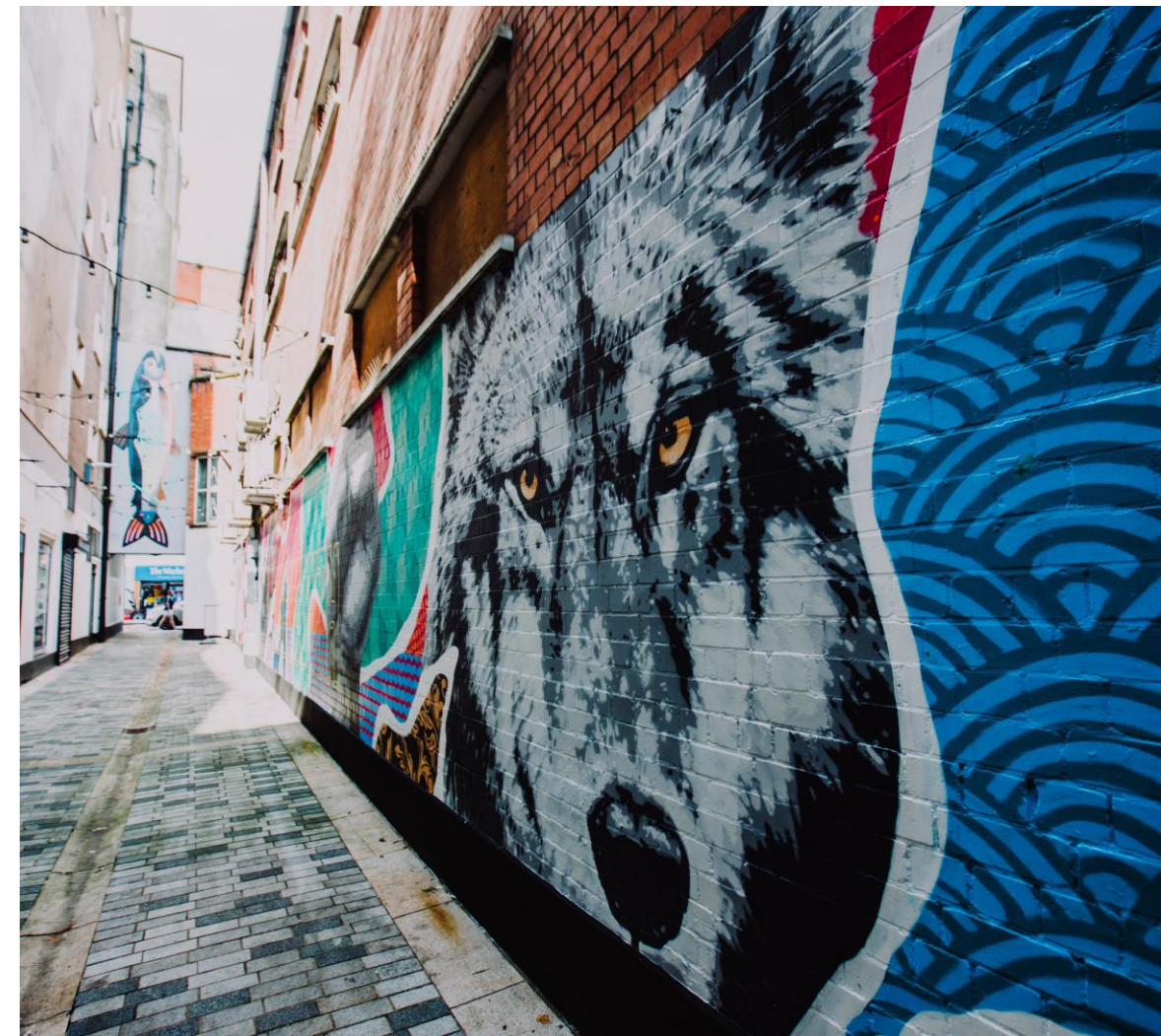
- Mix of higher value, longer term interventions (e.g. feature lighting installations) and lower cost but high impact measures such as general repair works, repainting etc
- Improved wayfinding and legibility through the city centre
- Promoting local heritage and culture
- The project transformed the entries into vibrant places that are safe, welcoming, playful, and imaginative



Before



After



A Liveable City - Tactical Regeneration

Quick Low Cost High Impact

Belfast



Castle Street
July 2018 | £1.5k



Lower Garfield St / North St
2019 | £8k



Castle Arcade
Nov 2019 | £17k



College Street
Dec 2019 | £12k



Castle Place
2019-2020 | £6k



Bank Square
July-Aug 2020 | £28k



Castle Street
Aug 2020 | £35k



Marquis Street
Nov-Dec 2020 | £24k



Brunswick Street (underway)
Jan 2021 | £70k

Belfast

Tactical Regeneration Programme

Appendix B- Tactical Regeneration: Emerging Projects



Tactical Regeneration

Quick Low Cost High Impact

5C's Revitalisation Scheme

Proposed project involving:

- Rejuvenating building facades;
- Promoting active frontage to street level units;
- Innovative floral displays and introducing greening;
- Imaginative wayfinding initiatives;
- Inclusion of an enhanced lighting scheme;
- Interactive elements to provide points of interest for all, including incidental play

Page 30



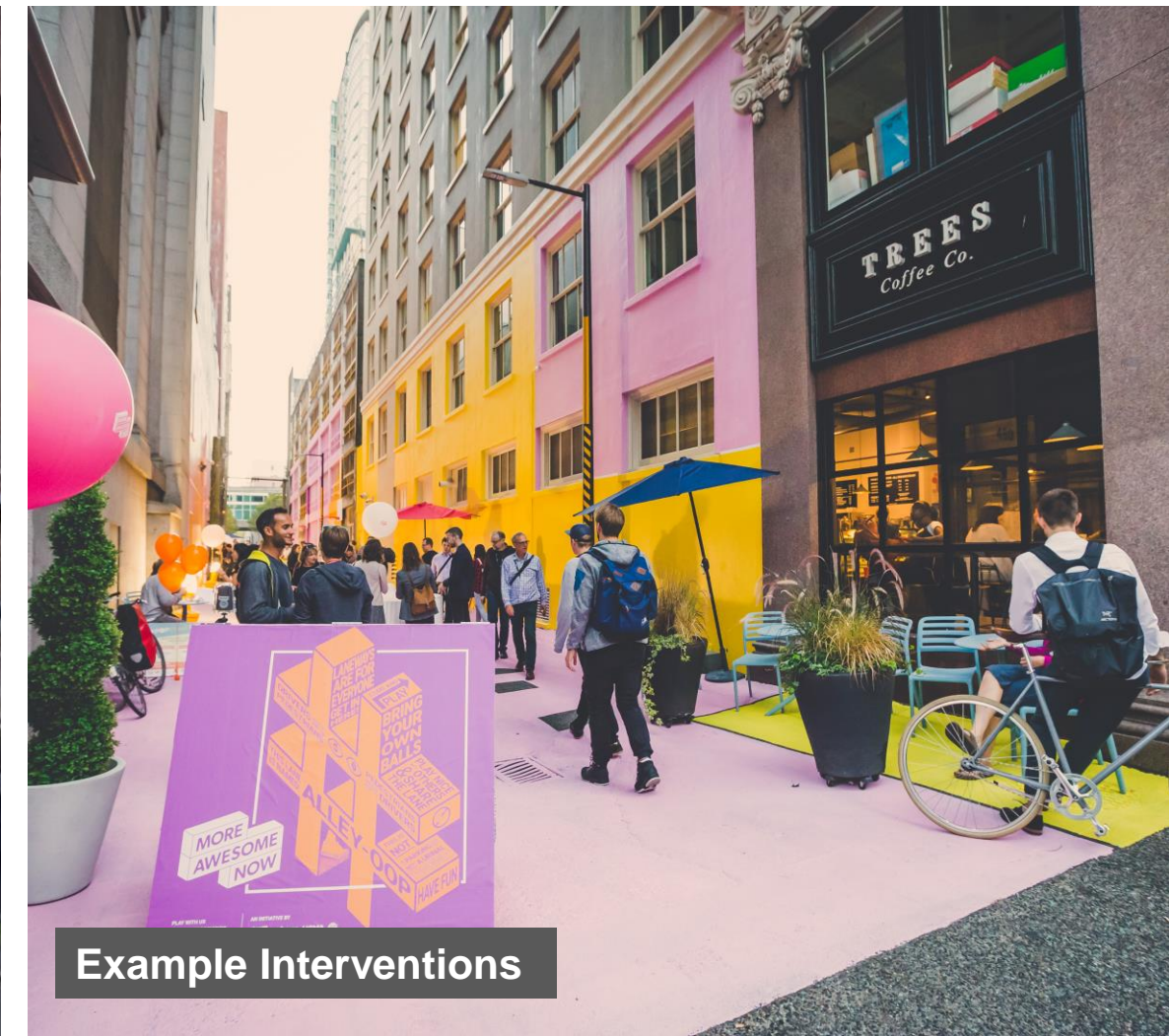
Callender Street



Example Interventions



College Street

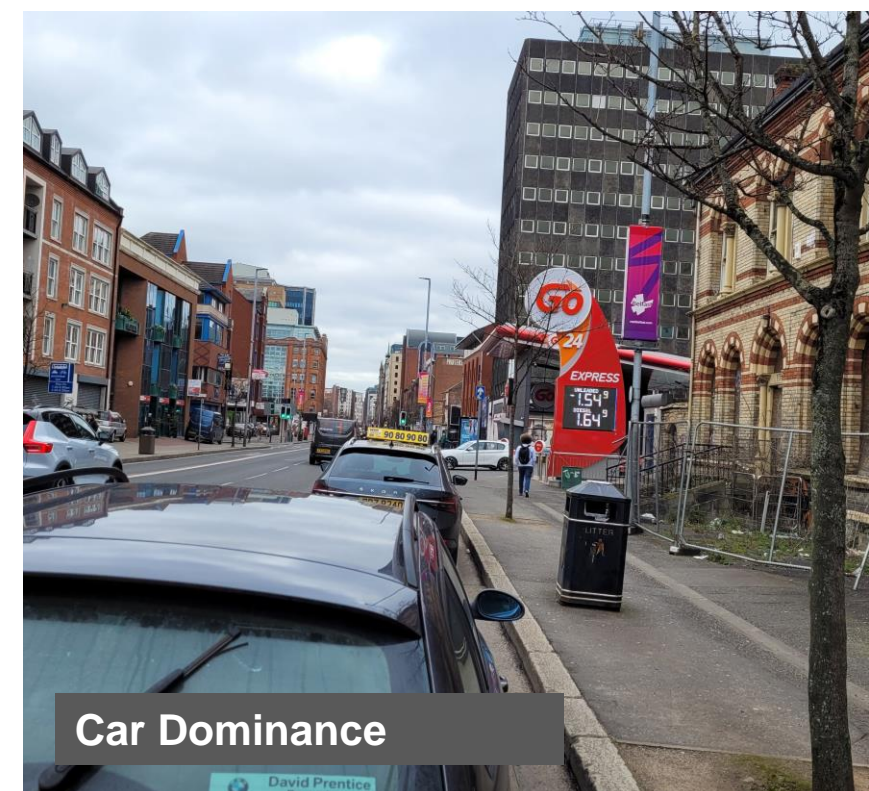


Example Interventions

Tactical Regeneration

Quick Low Cost High Impact

Great Victoria Street- Current Condition



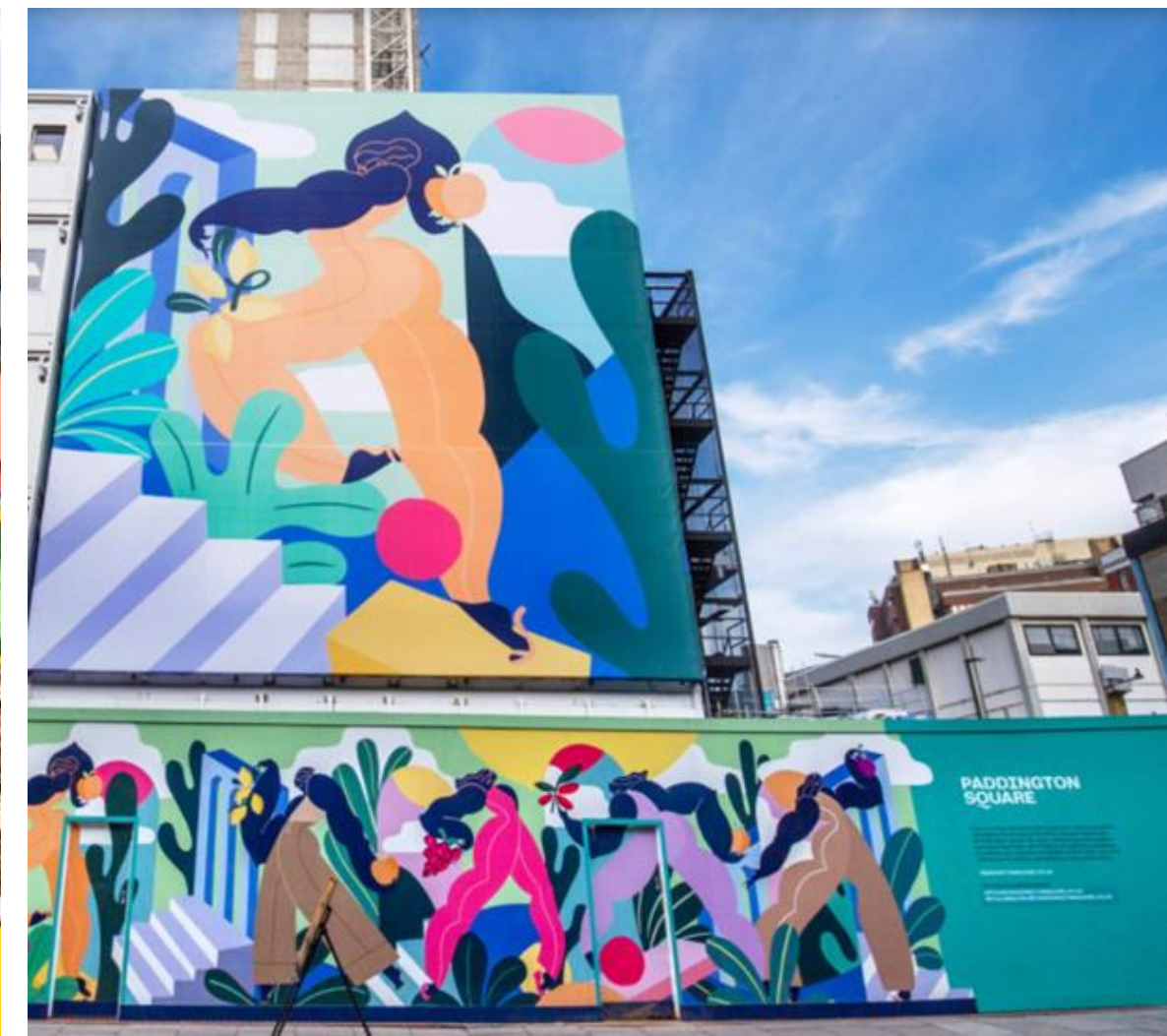
Tactical Regeneration

Quick Low Cost High Impact

Potential Scheme: Great Victoria Street

Potential scheme to be developed to support future funding applications:

- Rationalising existing street furniture, to remove barriers to pedestrian access;
- Promoting active human scale frontage;
- Creating innovative green spaces;
- Designing imaginative wayfinding through work with local artists that celebrates local heritage.



Tactical Regeneration

Quick Low Cost High Impact

Shaftesbury Square- Current Condition

Shaftesbury Square- Current Condition



Tactical Regeneration

Quick Low Cost High Impact

Potential Scheme: Shaftesbury Square

Potential scheme to be developed to support future funding applications:

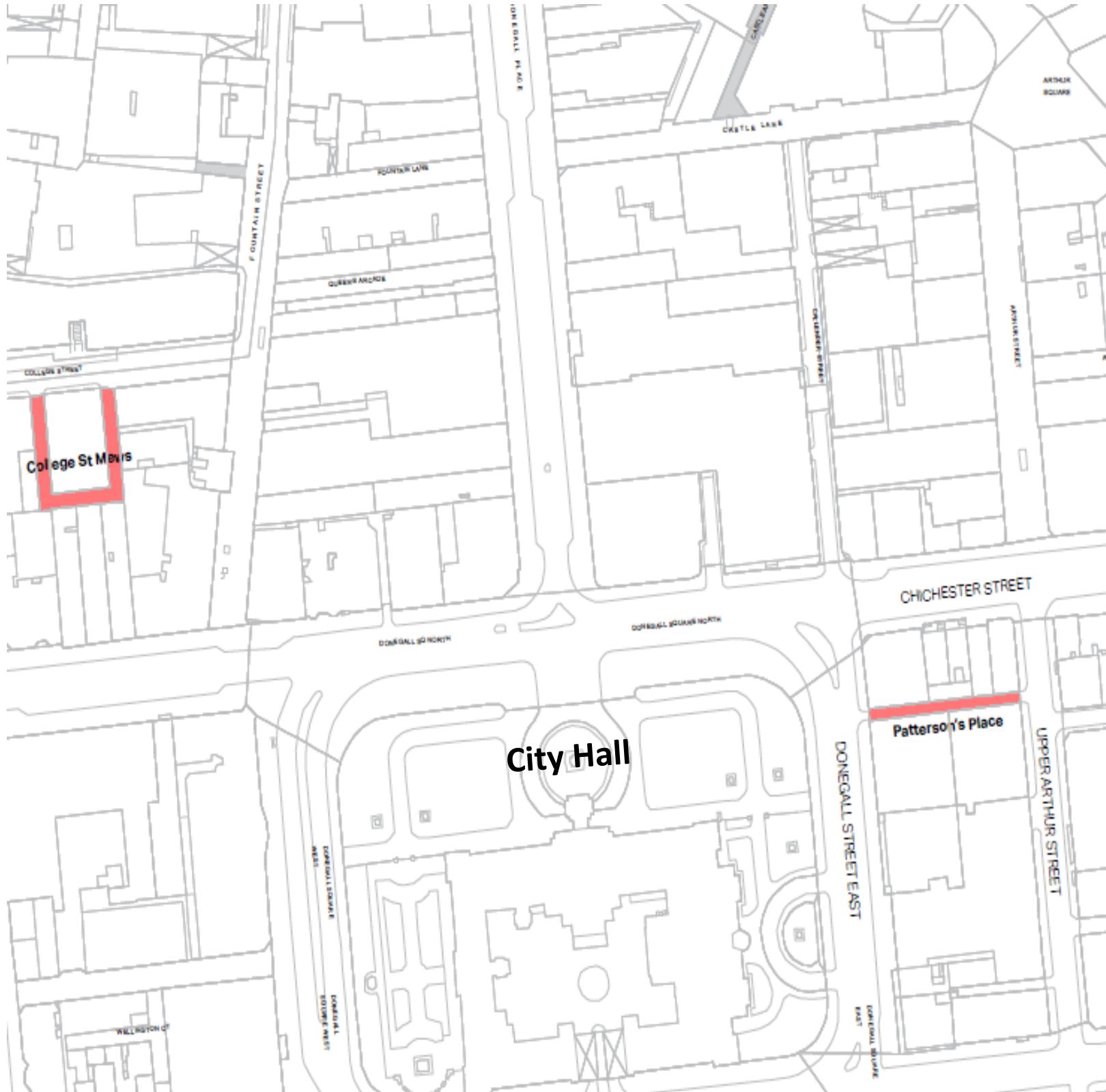
- Innovative wayfinding and signage that promote walkability;
- Creating flexible meeting spaces that provide connectivity to the surrounding streets;
- Creating innovative public realm spaces that are safe, clean and prioritise people;
- Enhancing the existing green infrastructure of the area;
- Creating spaces that celebrate and enhance the local character and heritage of the area.



Appendix C- Entries Phase 2 Project Area



Exchange Place / Warehouse Lane / Sugarhouse Entry / High St Court / Cole's Alley



College St Mews / Pattersons Place

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Subject:	DFI Inconsiderate Pavement Parking – Options Paper: Draft Response
Date:	6 April 2022
Reporting Officer:	Cathy Reynolds, Director, City Regeneration and Development
Contact Officer:	Sean Dolan, Senior Development Manager, City Regeneration and Development

Restricted Reports	
Is this report restricted?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If Yes, when will the report become unrestricted?	
After Committee Decision	<input type="checkbox"/>
After Council Decision	<input type="checkbox"/>
Some time in the future	<input type="checkbox"/>
Never	<input type="checkbox"/>

Call-in	
Is the decision eligible for Call-in?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

1.0	Purpose of Report or Summary of main Issues
1.1	The purpose of this report is to update Members on the draft submission to the DFI Inconsiderate Pavement Parking consultation that closed on 18 th March 2022. A draft response was submitted on behalf of Belfast City Council on the basis that it remains subject to agreement by this committee, and subsequent Council ratification in May.
2.0	Recommendations

2.1	<p>The Committee is asked to:</p> <ul style="list-style-type: none"> • Approve the Council's draft response submission to the DFI Inconsiderate Pavement Parking consultation enclosed with this report at Appendix 2. Members are asked to note that a draft response was submitted by the closing date of 18 March 2022 on the basis that it remains subject to the approval of this Committee and subsequent Council ratification in May.
3.0	Main report
3.1	<p><u>Background</u></p> <p>The Department for Infrastructure is seeking a resolution to the difficulties caused by inconsiderate parking on the pavement. Initial exploratory work undertaken by the Department is presented in the document Inconsiderate Pavement Parking – An options paper (Appendix 1). The paper provides background on the issue, looks at the position elsewhere in the UK and Ireland and sets out some associated considerations before setting out what the Department considers would be the most practical options for dealing with the issue.</p>
3.2	<p><u>Context</u></p> <p>There is currently no legislation in place to stop vehicles from inconsiderate or obstructive pavement parking and it is clear that this presents dangers to pedestrians, especially people with disabilities and parents or carers with prams and young children. While drivers often think they are doing the right thing by keeping the road clear for other motorists they fail to recognise that this blocks the pavement for those who walk, wheel or cycle. It can also force these people onto the road placing them at a high risk of harm.</p>
3.3	<p>The options being considered by the Department and which the consultation sought views on, are the following:</p> <p>Option 1: introduce individual bans using the Department's existing powers.</p> <p>Option 2: introduce an outright ban on pavement parking possibly with some exceptions.</p> <p>Option 3: introduce powers that would allow the Department's Traffic Attendants to enforce against vehicles found to be parked on the pavement and causing an obstruction.</p>

3.4	<p>The Department also sought views on how to deal with vehicles parked across dropped kerbs which have been lowered specifically to help people cross the road.</p> <p>Belfast City Council Draft Consultation Response</p>
3.5	<p>Members are asked to approve the Council's draft consultation response submission to the DFI Inconsiderate Pavement Parking – Options Paper, as included within Appendix 2 of this report. Given the tight timeframes for the submission to the consultation this response was submitted in line with the timeframes outlined within the Consultation, however, included a caveat that the response remains subject to agreement by the City Growth and Regeneration Committee, and subsequent Council ratification in May. Officers will advise the consultation team of any further comments or amendment requests following this Committee meeting and the Council meeting in May.</p>
3.6	<p>The draft response sets out the Council preference for Option 2 - introduce an outright ban on pavement parking, possibly with some exceptions out of the three options presented within the Department's options paper. This option most closely aligns with the Council's Car Parking Strategy. It is also supported by the visioning principles of A Bolder Vision for Belfast, particularly principles two and three which seek to prioritise active travel, end car dominance, and promote safer streets for those who walk, wheel or cycle.</p>
3.7	<p>The response also notes that there can be no one-size-fits-all resolution to the issue of inconsiderate pavement parking or obstruction of blocked kerbs and that proper and meaningful consultation will be required. Clearly Disability and Inclusive Mobility Advisory groups such as IMTAC should be consulted to provide expertise and insights prior to a final decision being made. However, it is felt that it would be beneficial for everyone, not just people with disabilities, for an outright ban on pavement parking to be introduced, with the only exceptions being emergency situations.</p>
3.8	<p>The draft consultation response also highlighted the issue of inconsiderate parking within the inner-city residential areas where parking availability is particularly constrained. We propose that there is improved management and regulation measures in city residential areas proportionate to location specific layout and viability, in recognition that many streets are not designed to accommodate current volumes of traffic and vehicle numbers.</p>

3.9	<u>Financial & Resource Implications</u> None associated with this report.
3.10	<u>Equality or Good Relations Implications/Rural Needs Assessment</u> The implications of the Equality or Goods Relations Implications and Rural Needs Assessments will need to be undertaken forward by the Department for Infrastructure in line with their own policy positions and prior to undertaking an implementation.
4.0	Appendices – Document attached
	Appendix 1: DFI Inconsiderate Pavement Parking – Options Paper Appendix 2: DFI Inconsiderate Pavement Parking – Options Paper: Belfast City Council draft response submission

INCONSIDERATE PAVEMENT PARKING

Options Paper

CONTENTS

Page

What is the Problem	2
Background	3
The Position Elsewhere	4
Considerations	6
Options	7
Parking across Dropped Kerbs	12
Questions	14
Next Steps	18

PAVEMENT PARKING

Options Paper

What is the Problem?

Many of our streets were not designed to accommodate today's volumes of traffic and vehicle numbers, and at some locations, due to narrow roads and the absence of driveways, some people choose to park on the pavement (footway) rather than obstructing the carriageway (road). However pavements are not designed to be used for this purpose, they are for use by people, not for the parking of vehicles.

While parking on the pavement may appear to help address one problem by helping to keep vehicular traffic moving, it can often create other issues, and at some locations pedestrians are being forced onto the carriageway and into the flow of traffic. This is an issue for all people but especially for those who are blind or partially sighted, for those with mobility difficulties, and also those using prams or buggies.

Footways are also not designed to support the weight of a vehicle and pavement parking can result in damage to the surface, with repairs costs placing an additional financial burden on the public purse. The resulting damage to the pavement can also lead to a trip hazard which can result in personal injury, with compensation paid out on any associated claims further impacting the public purse.

This paper outlines the difficulties caused by pavement parking and sets out possible options for dealing with it. The Department is seeking your views on the issue and on the options suggested, including possibly dealing with vehicles parked across dropped kerbs.

You will be able to provide comment on this options paper until 18 March 2022.

Where possible, response should be made via Citizen Space on the NI Direct website using the following link:

<https://consultations2.nidirect.gov.uk/dfi-1/pavement-parking-consultation>

Other ways to respond are included in the 'How to Respond' section at the end of the paper.

Background

Although the term 'footway' is used in legislation, the more commonly used term 'pavement' is also used in this document to describe the part of a road which is located alongside the carriageway on which there is a public right of way on foot. This is distinct from a 'footpath' which is remote from a road.

Rule 244 in the Highway Code NI states: *"DO NOT park partially or wholly on the footway or footpath unless signs permit it. Parking on the footway or footpath can obstruct and seriously inconvenience pedestrians, people in wheelchairs or with visual impairments and people with prams or pushchairs."* The Department's road safety and sustainable travel social media channels regularly post reminders about this rule.

The Police Service of Northern Ireland (PSNI) has powers to enforce against a vehicle found to be causing a general obstruction under Regulation 119 of the Motor Vehicles (Construction and Use) Regulations (Northern Ireland) 1999 or found obstructing the access to premises under Article 5c of the Roads (Restriction of Waiting) Order (Northern Ireland) 1982.

With the exception of heavy commercial vehicles (Article 30 of the Road Traffic (Northern Ireland) Order 1995), there is no single piece of legislation that prohibits vehicles from parking on footways; however, where there are parking restrictions, these apply to both the carriageway and footway, and consequently the Department can carry out enforcement action against vehicles parked in contravention of such restrictions.

The Department has powers to introduce footway parking bans. There are a number of locations where the Department has prohibited footway or verge parking in response to localised problems caused by vehicles either being parked on the footway, or causing damage to the verge.

There is also a blanket order which prohibits parking in the following areas for traffic management and road safety reasons:

- i. on a footway adjacent to clearway;
- ii. on a footway adjacent to a controlled area at Zebra, Pelican and Puffin crossings;
- iii. on a central reservation adjacent to a clearway;
- iv. on a cycle track adjacent to a clearway; or
- v. on a verge adjacent to a controlled area at Zebra, Pelican and Puffin crossings.

The Position Elsewhere

Scotland

The Transport (Scotland) Bill 2019 provided the powers to introduce a national ban on pavement and double parking in Scotland to make it easier for local authorities to ensure its pavements and roads are safer and more accessible to all.

The Bill received Royal Assent on 15 November 2019 and it includes three different parking bans:

- i. A pavement parking ban;
- ii. A ban on double parking; and
- iii. A ban on parking across a dropped kerb.

Transport Scotland is currently drafting guidelines for local authorities to use when identifying exempted streets. The local authorities will be given 12 months to review their areas, ahead of the overall Act coming into effect, to identify the streets that are to be exempted by Order under Section 50 of the Act.

England

During 2020 the Department for Transport (DfT) consulted on three possible options for dealing with pavement parking in England, the options were:

APPENDI

a

- i. to rely on improvements to the existing Traffic Regulation Order system;
- ii. to allow local authorities with CPE powers to enforce against 'Unnecessary obstruction of the pavement'; or
- iii. to introduce national pavement parking prohibition similar to that in place in London (with the option for exemptions).

The DfT received 15,000 responses to the consultation and has yet to report on the findings.

There has been a blanket ban on pavement parking in London since 1974, although some pavement parking is permitted using marked bays and traffic signs.

The London ban is promoted under three main strands:

- i. to prevent obstruction to pedestrians;
- ii. to prevent damage to the footway, reducing repairs and injuries; and
- iii. to maintain footways as an amenity, as the presence of cars and other vehicles parked on footways, verges and other pedestrian areas is viewed as detrimental to the urban environment.

Ireland

Pavement parking is also prohibited in the Republic of Ireland. In Dublin, it is enforced by An Garda Síochána, and vehicles found partially parked on the footway and causing an obstruction can be clamped. Vehicles parked with all four wheels on the footway are automatically clamped.

Wales

In October 2020 the Welsh Government announced plans to give Councils greater powers to prevent pavement parking by 2022. This approach would be similar to one of the options that was consulted on in England.

Wales has also been giving the matter some detailed consideration with the Wales Pavement Parking Task Force Group, which was set up on the direction of the Deputy Minister for Economy and Transport, reporting on the issue. The group's findings were published in October 2020.

The group rejected adoption of the outright ban being pursued in Scotland, stating that it was '*overly slow and complex*'. Instead they decided to give local authorities the power to fine people for parking on pavements, which they consider can be implemented much quicker.

The current intention is that local authorities would have the power to enforce against vehicles found to be causing an obstruction by July 2022.

Cardiff Council recently initiated an 18-month pilot scheme in City Road. Signs have been installed which show where the zone starts and ends and any vehicle that parks partially or fully on the pavement within the zone will be liable to a £70 Penalty Charge Notice. The scheme is being monitored to see if enforcement addresses the ongoing problems. If deemed successful, similar schemes could be introduced in other areas of the city that are currently experiencing problems with pavement parking.

Considerations

Vehicles parked inconsiderately on footways present real challenges for other road users, and in particular have adverse impacts for blind or partially sighted people and those who have mobility difficulties. While most people are aware of the issues caused, some still choose to park on the pavement, especially if it is outside their home and are likely to be reluctant to change their behaviour if it means parking somewhere less convenient. There needs to be greater recognition that footways are designed for people and should not be used for the parking of vehicles.

Removing vehicles from footways would ensure that space is available for its intended use, which is the safe passage of people.

A ban on footway parking would have clear benefits in terms of facilitating people with mobility issues including those using wheelchairs and walking aids, those with visibility or hearing impairments, along with those using prams and push chairs. It could also encourage more walking and more active lifestyles.

An outright ban on footway parking - either similar to that already in place in London, being introduced in Scotland, or being consulted

on in England - would show a strong commitment to promoting sustainable modes and ensuring that the footway network is both accessible and connected.

Achieving a reduction in damage to footways is another reason for introducing footway parking bans. As well as ensuring smoother surfaces, which are safer for walking and wheelchair users, it could potentially result in a reduction in maintenance costs, personal injuries and the resultant compensation claims and financial settlements.

Options

Three options are under consideration:

Option 1- introduce individual bans using the Department's existing powers.

Option 2- introduce an outright ban on pavement parking, possibly with some exceptions.

Option 3- introduce powers that would allow the Department's Traffic Attendants to enforce against vehicles found to be parked on the pavement and causing an obstruction.

Option 1 – introduce individual bans using the Department's existing powers.

The Department could make an Order to prohibit footway parking in individual streets where there is evidence of inconsiderate footway parking. Traffic signs would be required to indicate the extent of each individual prohibition.

Associated measures such as making a street one-way may also be required, if it is determined that the pavement parking ban will result in an increase in on-street parking leading to traffic progression issues. Consideration could also be given to managing parking by designating parking places and marking bays where parking is permitted. This could include bays which are partially on the carriageway and partially on the footway (see figure 1), and while this does not remove the footway parking altogether, it helps to keep the remaining space on the footway free to allow people to

pass safely. This approach is widely adopted in London Boroughs where there is an overall ban.

Option 1 would use existing legislative provision and it would seek to address inconsiderate pavement parking. It would be a controlled way of dealing with the issue, targeting those areas where problems are more evident.

Presently there is no formal guidance on how schemes should be selected and this would need to be developed.

Dealing with streets on an individual basis could be a slow process.

Option 2 – introduce an outright ban on pavement parking, possibly with some exemptions.

This option would be similar to that which has operated in London since 1974 and the approach currently being taken forward in Scotland.

This option would require changes to primary legislation to prohibit pavement parking, except at locations where the Department decides to allow it.

Where pavement parking is to be permitted by exemption, traffic signs and bay markings would be needed to indicate where pavement parking is permitted. This has the potential to add to the proliferation of traffic signs on our streets. The bay could be placed completely on the pavement where there is sufficient width, or 'part on / part off' as shown in Figure 1.

The legislation for both London and Scotland also includes exceptions to the prohibition for certain vehicles including, for example, breakdown or emergency service vehicles; highway maintenance vehicles; utility maintenance vehicles; or where it can be proved that a vehicle had been used for loading and unloading goods (typically for up to 20 minutes).



Figure 1 A residential London street which has an exemption from the London-wide pavement parking prohibition. Vehicles can park partially on the pavement within parking bays which are marked on the pavement

This option would establish a general rule against pavement parking, except where there is specific permission for it.

This approach would establish a consistent rule that *'you must not park on a pavement except where signs permit'*. Traffic signs and bay markings would only be needed to show drivers where pavement parking was still allowed.

In many areas pavement parking is possibly still required, so consideration would be needed to determine whether it should continue to be allowed, care would also be needed to ensure that a general ban does not have unintended consequences such as simply displacing parked vehicles to other areas.

It is likely that the introduction of a general prohibition would need a significant implementation period. Time would need to be allowed for the process of identifying and implementing exemptions, along with the production of guidance to identify streets to be exempted. It is not known at this stage how many streets would need to be exempted from a general prohibition in any single town or city.

Option 3 - introduce powers that would allow the Department's Traffic Attendants to enforce against vehicles found to be parked on the pavement and causing an obstruction.

The offence of unnecessary obstruction of the road already exists; although this is only enforceable by the PSNI as a criminal matter, under Regulation 119 of Motor Vehicles (Construction and Use) Regulations (Northern Ireland) 1999, which says '*No person in charge of a motor vehicle or trailer shall cause or permit the vehicle to stand on a road so as to cause any unnecessary obstruction of the road*'.

Under this option Traffic Attendants would be able to enforce obstruction as a civil matter, by issuing Penalty Charge Notices (PCNs) to vehicles found to be causing an obstruction of the pavement, without reasonable excuse. This would enable the Department to address inconsiderate obstructive pavement parking, without the need to prohibit pavement parking generally.

It is not proposed to fully decriminalise (meaning completely removing enforcement from the PSNI) as there may be some circumstances where a particularly dangerous obstruction of the pavement is more appropriately dealt with by the police as a criminal matter. Under this option, unnecessary obstruction of the pavement could therefore be enforced by either the PSNI (using a Fixed Penalty Notices (FPN) or by the Department issuing of a PCN). In the unlikely event of two penalties being simultaneously issued to the same vehicle, a Police FPN would take precedence over a PCN issued by a Traffic Attendant (the PCN would need to be cancelled and any payment refunded).

Unnecessary obstruction of the road other than the pavement would remain a matter for the PSNI.

Option 3 could be achieved by removing the 'pavement' from 'road' in Regulation 119 of Motor Vehicles (Construction and Use) Regulations (Northern Ireland) 1999 [Motor Vehicles \(Construction and Use\) Regulations \(Northern Ireland\) 1999 \(legislation.gov.uk\)](https://www.legislation.gov.uk/uksi/1999/119/regulation-119) - which makes unnecessary obstruction of the road an offence - and adding it to the list of contraventions subject to civil enforcement.

This option would also include exceptions, for example, breakdown or emergency service vehicles; highway maintenance vehicles;

utility maintenance vehicles; or where it can be proved that a vehicle had been used for loading and unloading goods.

While it is considered necessary to include exemptions for emergencies, and to maintain free-flowing traffic and to facilitate loading and unloading, we do not propose to exempt Blue Badge holders, or any other business need. The aim of the policy is to keep the pavement free of obstruction as far as possible; and we believe that use of other exemptions would undermine this objective.

It is acknowledged that the concept of 'unnecessary obstruction' is inherently vague so guidance will be needed. This would need to be agreed with all key stakeholders and in particular those groups representing people with limited mobility.

Unlike a general ban, an exercise to identify streets to be exempted would not be required, and it would not be necessary to place traffic signs and bay markings to indicate where pavement parking is still permitted. This is particularly relevant in rural areas where pavement parking is less likely to be a problem, and where placing signs to permit it might be regarded as unnecessary and disproportionate.

Enforcement against this offence would be more targeted than through adoption of a general prohibition of pavement parking, however it would be possible to penalise inconsiderate pavement parking.

Currently any parking restrictions enforced by the Department's Traffic Attendants are clearly defined using traffic signs and road markings, for example, yellow lines or white bay markings. By contrast, '*unnecessary obstruction*' will not be marked or signed in the locality and would therefore be more difficult to define. Careful consideration and detailed assessment would be required in each case.

Unlike a general ban under option 2 the message to motorists may not be as clear.

If this option was pursued, guidance would be needed to clarify the definition of an obstruction of the pavement, without reasonable excuse, in order to prevent inconsistent enforcement.

‘Unnecessary obstruction’ does not lend itself to a simple definition that works in all circumstances. It would be almost impossible to anticipate all of the possible real-world circumstances and to prescribe them in regulations. Instead, it is proposed to define the scenarios where pavement parking would, and would not, be deemed appropriate in guidance and our parking protocols which could be updated more quickly than regulations.

These protocols would need to be accompanied by appropriate media messages.

However, it may still not be possible to comprehensively define what we mean by unnecessary obstruction in guidance. It may be relatively easy to define a pavement obstruction but not so easy to define when it is necessary. For example, ‘Obstruction’ could be determined by whether the pavement width between the vehicle and the backline of the pavement is sufficiently wide to not obstruct the passage of a wheelchair user or person with a pram or buggy. Leaving a minimum width of say 1.5m between the parked vehicle and the back edge of the pavement could be deemed to be not causing an obstruction of the pavement. This width is derived from Section 3 of the DfT’s [inclusive mobility guidance](#); it is the absolute minimum required for a wheelchair user and pedestrians to pass one another.

Parking Across Dropped Kerbs

Irrespective of the option chosen to deal with pavement parking, the Department would also propose to explore ways of addressing vehicles parked inconsiderately across kerbs that have been specifically lowered or ‘dropped’ to help people cross the road. This is opposed to kerbs that have been dropped to facilitate vehicular access across the pavement for which the PSNI can already deal with under Article 5c of the Roads (Restriction of Waiting) Order (Northern Ireland) 1982.

Most dropped kerb facilities are found at junctions and existing regulations (the Roads (Restriction of Waiting) Order (Northern Ireland) 1982) makes it an offence to park within 15m of a junction. However the Department’s Traffic Attendants can only enforce these restrictions if the corner has been marked on the ground with double yellow lines, otherwise the PSNI would have to take action.

Elsewhere and away from junctions, the Department can only act if there is some form of restriction that applies on that part of the road. The PSNI can and does use its power under Regulation 119 of Motor Vehicles (Construction and Use) Regulations (Northern Ireland) 1999 but this sort of common parking violation could be better dealt with by the Department's Traffic Attendants.

Questions

What is your name?

What is your email address?

If you enter your email address then you will automatically receive an acknowledgement email when you submit your response.

What is your organisation / group?

Provide name if you are responding on behalf of an organisation / group.

If responding on behalf of a larger organisation, please make it clear who the organisation represents and, where applicable, how the views of members were assembled.

1. Do you think that pavement parking is a problem? **Y/N**
2. Do you think action is necessary to manage pavement parking differently to the current approach? **Y/N**
3. Do you think a general ban on pavement parking is necessary? **Y/N**
4. Do you think that pavement parking would be better handled on a more targeted street-by-street basis? **Y/N**
5. Do you think exceptions could be allowed for pavement parking under specific circumstances? **Y/N**
6. Do you think marking out parking bays that are partially on the pavement would help to manage pavement parking? **Y/N**
7. If in some limited circumstances pavement parking is allowed, how much space should vehicles be allowed to take up?
 - The width of a car
 - Leaving the width of a wheelchair
 - Leaving sufficient width to allow two wheelchairs to pass one another

- It is too difficult to say as different people have different needs
- It depends on the location

8. Do you think that inconsiderate parking across dropped kerbs is also an issue that needs addressed? **Y/N**

9. In the options paper, three options are proposed, namely:

Option 1 - introduce individual bans using the Department's existing powers.

Option 2 – introduce an outright ban on pavement parking, possibly with some exceptions.

Option 3 – introduce powers that would allow the Department's Traffic Attendants to enforce against vehicles found to be parked on the pavement and causing an obstruction.

Please tell us which option you think would be most suitable to address pavement parking in Northern Ireland?

- Option 1,
- Option 2,
- Option 3,
- None
- Other

Please use the following text box should you wish to provide some reasoning for your choice.

[Text box]

10. If you have any further views, thoughts or input which you would like to share, please detail below

[Text box]

HOW TO RESPOND

You will be able to provide comment on this options paper until 18 March 2022.

Where possible, response should be made using Citizen Space on the NI Direct website via the following link:

<https://consultations2.nidirect.gov.uk/dfi-1/pavement-parking-consultation>

The Department for Infrastructure has actively considered the needs of people with visual impairments in accessing this options paper.

The text will be made available in full on the Department's website which allows for e-readers (including the most recent versions of JAWS, NVDA and VoiceOver).

The text may be freely downloaded and translated by individuals or organisations for conversion into other accessible formats.

Our accessibility statement at Department's Accessibility Statement gives more information.

Please ensure that your response reaches us before the closing date.

If you would like further copies of this options paper or if you would like alternative or accessible formats (Braille, audio CD, etc.) please contact the Department on 028 90541014.

Responses to the options paper should be made online via Citizen Space as indicated above or, if that is not possible, by e-mailing RoadsEngineeringServices@infrastructure-ni.gov.uk .

If you prefer to provide a written response please post it to:

Traffic & Development Control Policy Branch
Room 2.11
Department for Infrastructure
Clarence Court
10-18 Adelaide Street

Belfast BT2 8GB

When responding, please state whether you are responding as an individual or representing the views of an organisation or group. If responding on behalf of a larger organisation, please make it clear who the organisation represents and, where applicable, how the views of members were assembled.

Confidentiality & Data Protection

Information contained in your response may be made public by DfI. If you do not want all or part of your response made public, please state this clearly in the response by marking your response as 'CONFIDENTIAL'. Any confidentiality disclaimer that may be generated by your organisation's IT system or included as a general statement in your correspondence will be taken to apply only to information in your response for which confidentiality has been specifically requested.

Information provided in response to this options paper, excluding personal information, may be subject to publication or disclosure in accordance with the access to information regimes (this is primarily the Freedom of Information Act 2000 (FOIA)).

The Department will process your personal data in line with the Department's Privacy Notice. Personal data provided in response to this options paper will not be published.

If you want other information that you provide to be treated as confidential, please be aware that, under the FOIA, there is a statutory Code of Practice with which public authorities must comply and which deals, amongst other things, with obligations of confidence. In view of this, it would be helpful if you could explain to us why you regard the information you have provided as confidential. If we receive a request for disclosure of the information we will take full account of your explanation, but we cannot give an assurance that confidentiality can be maintained in all circumstances. An automatic confidentiality disclaimer generated by your IT system will not, of itself, be regarded as binding on the Department.

As indicated above, the Department will publish a summary of responses following completion of the options paper process. Your response, and all other responses to the options paper, may be disclosed on request. The Department can only refuse to disclose information in exceptional circumstances. Before you submit your response, please read the paragraph below and it will give you guidance on the legal position about any information given by you in response to this options paper.

The Freedom of Information Act 2000 gives the public a right of access to any information held by a public authority, namely, the Department in this case. This right of access to information includes information provided in response to a consultation or an options paper. The Department cannot automatically consider as confidential information supplied to it in response to a consultation or an options paper. However, it does have the responsibility to decide whether any information provided by you in response to this options paper, excluding information about your identity, should be made public or treated as confidential.

NEXT STEPS

The information gathered as a result of this options paper will be considered by the Department and an analysis presented to the Minister for consideration. This process may result in a formal consultation which would include a preferred option to help inform how the Department intends to deal with pavement parking and any legislative change required as a result.

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Your Reference:

Our Reference:

Being dealt with by: Sean Dolan, Senior Development Manager, City Regeneration & Development

Date: 18th March 2022

Traffic & Development Control Policy Branch Room 2.11
Department for Infrastructure Clarence Court
10-18 Adelaide Street Belfast BT2 8GB

Email: RoadsEngineeringServices@infrastructure-ni.gov.uk

Dear Sir / Madam,

DfI Consultation on Inconsiderate Pavement Parking – Options Paper

Belfast City Council welcomes this opportunity to respond to the consultation on the Inconsiderate Pavement Parking. We note that there is currently no single piece of legislation that prohibits all vehicles from inconsiderate parking and that this represents several problems across the network including congestion in residential areas leading to residents parking issues as well as servicing issues for cleansing and general services and critically the impact of pavement parking on active and assessable connectivity for all of our residents. We believe this issue cannot be fully mitigated without initially considering the impact of the absence of parking provision for inner city residents. Our response to this consultation is framed by the Car Parking Strategy which seeks to minimise the potentially negative impacts of parking on residential communities in the city, particularly in inner city areas. It is also supported by the visioning principles of A Bolder Vision for Belfast, particularly principles two and three which seek to prioritise active travel, end car dominance, and promote safer streets for those who walk, wheel or cycle. The Council has previously raised the issue of inconsiderate parking within our city centre residential areas and the need for interventions to be delivered to ensure that Belfast can accommodate the growth envisaged under the Belfast Agenda.

Growth in city centre living, ongoing developments and prioritising sustainable and active travel corridors will require complementary and robust policies to manage demand and to ensure that further problem parking issues are not escalated and pushed onto into our residential and business districts. These initiatives have exasperated the lack of dedicated parking and on-street parking availability within residential areas which are becoming more and more constrained. As a result, car parking is often displaced onto pavements and other public spaces off the carriageway. In light of this the Council would recommend that there is a need to balance needs in residential and business areas where on street parking is often very limited.

As such, we would favour **Option 2 - introduce an outright ban on pavement parking, possibly with some exceptions**. Among the exceptions we would ask that for further exploration of the causal relationships to fully address the causes and provide practical solutions to inconsiderate and obstructive pavement parking. We encourage improved management and regulation measures in city residential areas proportionate to location specific layout and viability in that e.g., many streets not designed to accommodate current volumes of traffic and vehicle numbers.

Cathy Reynolds, Director of City Regeneration & Development, Place and Economy Department, Belfast City Council.

9 Adelaide Street, Belfast BT2 8DJ

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Mob: (0) 7796 540457

Email: reynoldsc@belfastcity.gov.uk

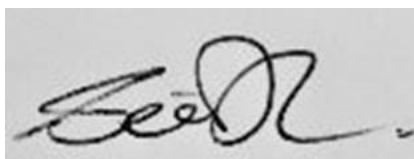
We believe that actions to tackle the issue of inconsiderate pavement parking must be augmented by a targeted and sustained public information campaign to help raise awareness of the issue and alert motorists to the potential dangers of inconsiderate and obstructive parking on those who walk, wheel or cycle, especially for people with visual and mobility impairments that require the aid of wheelchairs, walking aids or guide dogs, as well as carers using prams and buggies. This could reduce the need for enforcement as outlined in the options paper, especially given that there is limited awareness of the current legislation in relation to pavement parking.

We also acknowledge and support the view in the consultation paper that pavements are not generally engineered to be driven on and repairs to damaged pavements are expensive, particularly at a time when public sector resources are under huge pressure. This creates further hazards to pavement users of all-abilities.

In conclusion, Belfast City Council is supportive of **Option 2- introduce an outright ban on pavement parking, possibly with some exceptions**. However, we would caveat this with the observation that a solution of the issue of inconsiderate pavement parking and obstruction of dropped kerbs will not be found in a one-size-fits-all approach and will need to be done in conjunction with proper consultation with local residents and business owners. The Council is encouraged by this Consultation, however, is minded that this approach will take time to implement and is keen to work with the Department and other stakeholders to bring forward interim measures targeting specific areas of blight to ensure that effective action is delivered as soon as possible.

In addition to this the Council is about to undertake a review and refresh of our Car Parking Strategy and would welcome the opportunity to work with the Department to ensure that this review considers this consultation, as well as outlining adequate measures to overcome this issue, and the wider issues surrounding commuter parking in residential areas. The Department is also asked to note that this consultation is viewed as draft pending agreement at the City Growth and Regeneration Committee on the 13th April and subsequent ratification at the Full Council meeting on the 1st May, whereupon Council will confirm the final submission on this consultation.

Yours sincerely,



p.p.

CATHY REYNOLDS
DIRECTOR OF CITY REGENERATION & DEVELOPMENT

Cathy Reynolds, Director of City Regeneration & Development, Place and Economy Department, Belfast City Council.

9 Adelaide Street, Belfast BT2 8DJ

Tel: +44 (0) 28 9027 0386 Mob: (0) 7796 540457 Email: reynoldsc@belfastcity.gov.uk



Subject:	DfI Blue Green Infrastructure Fund – Active Travel Projects
Date:	6 th April 2022
Reporting Officer:	Cathy Reynolds, Director, City Regeneration & Development
Contact Officer:	Sean Dolan, Senior Development Manager

Restricted Reports	
Is this report restricted?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If Yes, when will the report become unrestricted?	
After Committee Decision	<input type="checkbox"/>
After Council Decision	<input type="checkbox"/>
Some time in the future	<input type="checkbox"/>
Never	<input type="checkbox"/>

Call-in	
Is the decision eligible for Call-in?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

1.0	Purpose of Report or Summary of main Issues
1.1	To update the Committee on DfI's Blue Green Infrastructure Funding relating to Active Travel Projects and seek approval to further progress the proposed project around enhanced connectivity on the Greater Clarendon North South Spine to RIBA Stage 3.
2.0	Recommendations
2.1	The Members of the Committee are asked to:

	<ul style="list-style-type: none"> Note the Letter of Offer from DfI for capital funding to deliver Active Travel Enabling projects has been signed and officers are working to deliver the secure cycle units, covered cycle units and cycle repair stands under this Letter of Offer. Agree to progress the proposal to develop the designs for the Greater Clarendon North South Spine connectivity project, in conjunction with Belfast Harbour Commissioners, with a view to attracting further capital funding for delivery.
3.0	Main report
3.1	<p><u>Background</u></p> <p>The CG&R Committee received an update in relation to the Blue and Green Infrastructure Fund in March 2022, which included noting the status of discussions with the Department for Infrastructure in relation to the funding proposals around Active Travel Enablers, agreeing to advanced procurement of covered cycle stands and repair stations and the delivery route of secured cycle stands via an EOI process. In addition, Members were provided with an overview in relation to the proposal to develop designs for the Greater Clarendon North South Spine and agreed officers would work with DfI and others, to secure funding and bring designs through to RIBA Stage 3.</p>
3.2	<p>The Letter of Offer in respect of the project proposal for Active Travel Enablers has been signed and returned to the Department with progress being made against delivery in terms of scoping and procurement, with a detailed report to be brought to Committee at a future meeting to include consideration on locations of repair stands and covered cycle stands as well as the EOI process on secured stands.</p>
3.3	<p><u>Report</u></p> <p>Following the report presented to Committee in March 2022, there has been a series of discussions between DfI and Council in relation to the funding proposal around the development of designs for the Greater Clarendon North South Spine. As Members will recall the project is directed at the enhancement of connecting routes to and from the city centre and the Greater Clarendon area. This will better link communities from the Greater Clarendon / Sailortown area to and from the city centre. Given issues of severance with the city centre this was identified as a priority connectivity project in the Greater Clarendon and Sailortown Masterplan / Accessibility Guide progressed by DfC in conjunction with BCC, DfI and other partners including local communities.</p>
3.4	<p>As previously reported to Committee the 'North-South Spine' concept was developed as part of the Greater Clarendon & Sailortown Masterplan and subsequent Public Realm & Accessibility Design Guide, which noted the importance of improved north-south pedestrian</p>

	and cycle links (and east-west links) in terms of integrating Greater Clarendon and Sailortown into the city centre, enhancing local links to the Cathedral Quarter and City Quays, and linking the two new proposed city parks at Cathedral Gardens and City Quays.
3.5	Following submission of the business case to DfI and indication from the Department that an offer of circa 50% funding may possibly be made, albeit with a very tight timeline for delivery, the Committee are asked to note that this application for funding has not been awarded at this stage. The Department however have indicated that if the proposal was further developed, with a cost plan and initial designs, there is a possibility of further funding in future years to support delivery / construction of the scheme. In essence feedback has concluded that there is a need for Council to further develop the feasibility of the project in order to attract further funding.
3.6	The progression of this proposal will enable Council to actively adopt the principles of A Bolder Vision and help to connect the communities in Sailortown to the city centre. Alongside the emerging plans for 'City Quays Gardens', it is proposed to develop similarly ambitious streetscape and open space design proposals for adjacent connecting streets. The proposed area takes in Tomb St, Corporation St, and design development would focus on enhancing local public realm and ease of movement, while contributing to wider city connectivity, including pedestrian and cycle links between City Quays and Custom House Square, the Cathedral Quarter and UU campus and accommodation. This scheme would complement and enhance the proposed Little York Street / Little Patrick St scheme which is currently under design development to address the already secured Developer Contributions from recent developments in the area.
3.7	Following recent discussions with Belfast Harbour Commissioners (BHC), there is now a proposal that the feasibility work for the North South Spine scheme could be co-funded (50/50) and co-delivered with BHC and Council up to RIBA Stage 3, pending Council approval. BHC has indicated their approval in principle to this, subject to agreement on the scope of works. This work would be brought forward under the existing BCC/BHC Memorandum of Understanding with a view to preparing the scheme to a position that could attract project delivery partner funding in future years.
3.8	The proposed scheme may include, but would not be limited to, enhanced pedestrian crossings, dedicated cycle lanes, soft landscaping, lighting, resurfacing, open space, street furniture. In line with the RIBA Plan of Work, preparation of design information to Stage 3 will include site appraisal, concept development, options appraisal, business case

	development, feasibility studies, development of project brief / budget / programme and stakeholder engagement.
3.9	Specific outputs from the currently proposed design development work will include: <ul style="list-style-type: none"> • RIBA Stage 3 Report • Outline Specification • Cost Plan • Planning application submitted
3.10	Taking this approach will develop the project to be in a position to attract future funding should it become available. On completion of the stages outlined above, the project will be in a much stronger position to bid for future funding streams. As previously reported to Committee there are a number of developer contributions which have been agreed in principle for public realm provision in this area. It would be advantageous to have a better defined and developed project in order to fully utilise these contributions, and to aid negotiation of potential future developer agreements that could also support delivery of this project.
3.11	Finance & Resource Implications
	Up to £100,000 from approved City Regeneration and Development budget for 22/23 under the budget line Active Travel, Connectivity and City Infrastructure, and up to £100k contribution from BHC (subject to agreement on scope).
3.12	Equality or Good Relations Implications/Rural Needs Assessment
	Equality of opportunity and good relations, and disability duties screening will be carried out on the schemes prior to implementation.
4.0	Appendices -Documents attached
	Appendix 1: North South Spine

SAILORTOWN

UNIVERSITY
AREA

CITY QUAYS

CATHEDRAL QUARTER

NORTH-SOUTH SPINE

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Subject:	Make Yourself at Home – Tourism Plan
Date:	6 April 2022
Reporting Officer:	John Greer, Director of Economic Development
Contact Officer:	Eimear Henry, Senior Manager – Culture and Tourism

Restricted Reports	
Is this report restricted?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If Yes, when will the report become unrestricted?	
After Committee Decision	<input type="checkbox"/>
After Council Decision	<input type="checkbox"/>
Some time in the future	<input type="checkbox"/>
Never	<input type="checkbox"/>

Call-in	
Is the decision eligible for Call-in?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

1.0	Purpose of Report or Summary of main Issues
1.1	At a meeting of City Growth and Regeneration Committee in September 2021, it was agreed that the draft tourism plan for Belfast, <i>Make Yourself at Home</i> would complete a 12-week public consultation. The purpose of this report is to provide Members with an overview of feedback and present the final plan for approval.
2.0	Recommendations
2.1	Members are asked to: <ul style="list-style-type: none"> - Note the contents of this report and feedback received as part of the public consultation.

	<ul style="list-style-type: none"> - Agree the final plan, <i>Make Yourself at Home</i> including the priorities as set out at appendix 2 for year one and associated budgets.
3.0	Main report
3.1	<p>Members will be aware that at a meeting of City Growth and Regeneration Committee in September 2021 it was agreed that the <i>draft</i> tourism plan, <i>Make Yourself at Home</i> would complete a 12-week public consultation. The purpose of this plan is to:</p> <ul style="list-style-type: none"> - Deliver on the tourism priorities set out in the <i>Belfast Agenda</i> recognising the importance of tourism to <i>Growing the economy</i> and <i>City Development</i>. - Align to the ten-year cultural strategy, <i>A City Imagining</i>, in order to ensure that tourism development supports cultural development and is based upon an authentic and sustainable Belfast offer. - Support economic and social recovery in the context of COVID-19 including stabilisation, recovery and growth with the opportunity to build back better. - Provide strategic context to the Belfast Region City Deal that sets out wider city priorities to ensure Belfast's appeal internationally and ability to attract out of state visitors.
3.2	<p>Tourism Growth Pre Covid-19</p> <p>Despite significant growth and the success of flagship projects such as Titanic Belfast there is still a gap in scale and maturity of the local industry when compared with other regions. Notably, Northern Ireland lags behind UK regions and Republic of Ireland with respect to tourism as a driver for job growth. However, the positive trajectory in place before Covid-19 had identified tourism growth as both feasible and a necessary part of inclusive economic growth. The challenge of any tourism development plan will be to create a sustainable model that continues to support the growth that is essential for city success and the creation of jobs.</p>
3.3	<p>Belfast's tourism and hospitality sectors directly support 19,300 jobs, one third of the sector in Northern Ireland. Key tourism sectors such as Accommodation & Food Services, Arts, Entertainment & Recreation and Transportation have been impacted by COVID-19 however if Belfast's recovery from the pandemic is managed then the growth potential remains high. The hospitality sector is an employment-intensive one, supporting a disproportionate number of jobs compared with the average sectoral GVA: jobs ratio. Between 2013 and 2019 employment in Accommodation and Food Services in Belfast</p>

	increased by 18.2 percent, compared with 8.5 percent growth in the city's total employment.
3.4	It was in this context that Tourism NI set the ambitious target of doubling the value of the tourism industry to £2 billion by 2030. A key element of this opportunity further reinforced by ambitions of the Belfast Region City Deal was getting a bigger share of the international visitors coming to the island of Ireland to travel to Belfast and the Belfast region.
3.5	<p>Impact of Covid-19</p> <p>While the full impact of Covid-19 is as yet unknown what is clear is that recovery will require new and innovative approaches in an increasingly competitive market. As the regional driver, Belfast will be hugely significant to this growth ambition, both in terms of visitor spend and the creation of new jobs. It is therefore imperative that our city break destination is developed in a strategic way which maximises the economic benefits that can be derived from tourism for local industries, businesses and communities, as well as increasing visitor numbers and spend and improving overall satisfaction levels.</p>
3.6	<p>Developing a ten-year plan</p> <p>The <i>Make Yourself at Home</i> tourism plan sets out a vision for the future of tourism in the city that is centred on a people-based and sustainable model of development with a focus on:</p> <ul style="list-style-type: none"> - Increasing the coherency of the Belfast experience - Supporting quality authentic products - Developing skills - Strengthening the city's position through marketing and communications
3.7	<p>The approach</p> <p>The past two decades have given rise to a number of trends within tourism development. This has included the popularity of approaches such as cultural tourism, green tourism or local tourism. What each of these approaches and associated models have in common is an increasing awareness that sustainable forms of tourism must respect the local context and support the economic, social, environmental and cultural values of a place.</p>
3.8	In the context of Belfast, even before COVID-19, this is a complex proposition. The city requires further growth with a clear international agenda and need to continue to attract and grow out of state visitors. The new tourism plan seeks to set out how this growth can

	be achieved in a responsible and inclusive way recognising that the city's greatest asset is its people.
3.9	<p>The plan sets out a shared vision for tourism in the city and is supported by 4 strategic themes and three of catalyst projects. The strategic themes are:</p> <ul style="list-style-type: none"> - Grow Belfast - Experience Belfast - Position Belfast - Sustainable Belfast
3.10	Each theme is supported by an evidence-based body of work and research.
3.11	<p>Public Consultation</p> <p>Following approval by City Growth and Regeneration Committee, the <i>draft Make Yourself at Home – A vision for the future of tourism</i> completed a 12-week public consultation. As part of this process Council engaged directly with over 330 stakeholders including:</p> <ul style="list-style-type: none"> - Online citizens and stakeholder engagement: The council carried out an online 12-week consultation via the Council's YourSay engagement platform to gather information, and this provided an opportunity for residents and stakeholders to review proposals, provide feedback and help shape the final plan. Results indicated 123 visitors and 30 full responses to the survey. - Workshops and Presentations - nearly 200 attended these workshops tailored around the themes of the plan including a dedicated session on Belfast Stories. Attendance included a wide range of community tourism organisations, tourism businesses, partners and cultural organisations. - Council's Section 75 consultee list: The council issued the consultation to our Section 75 list and provided representative groups with an opportunity to respond. Presentations were delivered to the Council's Equality Consultative Forum and Disability Advisory Panel. - Response to requests for one-to-one meetings and presentations with a variety of stakeholders across the city, gave the opportunity for focused and in-depth engagement with stakeholders. This helped to foster a greater understanding of how the draft Tourism Plan can feed into their field of work, as well as identifying opportunities for city wide partnership working and collaboration. - Presentation of the draft Tourism Plan as an integral part of recent Belfast Stories engagement.

3.12	<ul style="list-style-type: none"> - Council's stakeholder list: The council issued the consultation to a wide range of organisations including: Tourism Ireland, Tourism NI, Visit Belfast (500 tourism business partners), Community Tourism projects via Fáilte Feirste Thair, Eastside Partnership, Shankill Partnership and South Belfast Partnership, Belfast Hills Partnership and Colin Glen Trust and National Trust, tourism sector businesses, visitor attraction representatives, tour guides, individual artists and organisations within the cultural sector and trade representative organisations. <p>The overall feedback on the plan was very positive with the principles of being people-centred, responsible and sustainable strongly welcomed. General areas of feedback included:</p> <ul style="list-style-type: none"> - Support for an inclusive approach that recognises need for investment in neighbourhoods and creates opportunities for co-design with local communities. There is a need for long-term investment and capacity building to allow for engagement, development and delivery. This should be tailored to recognise that not all parts of the city or communities are at the same stage of development. - Importance of Council's leadership role as well as direct delivery especially in relation to the principle of responsibility. - Importance of an all encompassing approach to sustainability that includes an economic and social dimension as well as environmental. - Affordability – need to minimise negative impact of tourism on locals and maximise positive impacts. - Importance of alignment with climate and resilience programmes. - Inclusivity is important and this should consider thematic as well as geographic alignment to reflect diversity within the city. Organisations that don't fit into neighbourhoods also need to be afforded opportunity to avail of funding and the governance structure should reflect this. - Importance of measuring benefits to local communities beyond economic impact. The plan sets out a comprehensive approach to measuring success that includes economic and social benefits. - Opportunity to position innovation in tourism using our digital and creative industries to come up with new ways to enhance experiences and improve connectivity. - As well as new developments Council should commit to building on city's existing asset base and address challenges such as infrastructure to improve access.
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3.13	<p>Strategic Themes</p> <p><i>Strategic theme 1: Grow Belfast</i> (supported by EY Recovery report)</p> <p>This theme focuses on the role of tourism in city recovery including the need for stabilisation of the tourism sector and the requirement for further growth in Belfast. This includes:</p> <ul style="list-style-type: none"> - Strategic context and evidence-based proposition that Belfast acts as a catalyst for the region. - Measurement of the attractiveness of the city as a destination and how this plays a key role in maximising the economic impact of each visitor by increasing average length of stay and daily spending levels. - Priority areas for investment e.g. catalyst projects. - Introducing social, cultural and environmental measures to better understand and advocate for the true value of responsible tourism growth.
3.14	<p>Specific areas for feedback to be addressed in implementation plans and alignment to <i>Bolder Vision</i> and <i>A City Imagining</i>:</p> <ul style="list-style-type: none"> - Need to ensure that there is investment in existing assets - Important to recognise and support key elements of Belfast's existing offer and wider Belfast stories such as maritime, music, culture and arts - Relationship between regeneration and tourism including need to improve access to tourism assets through better connectivity – addressing areas of low footfall, dereliction etc.
3.15	<p><i>Strategic Theme 2: Position Belfast</i> (supported by a Positioning Review completed by Blue Sail Consulting).</p> <p>A critical dimension to any tourism development plan is understanding the market and how the brand operates in this space. In order to develop an effective strategy there also needs to be consideration of the brand architecture for the city and the region. The result should be clarity of roles and responsibilities for agencies working in this field including Council's own role and city partners such as Visit Belfast and Tourism NI. <i>Make Yourself at Home</i> sets out a dynamic model for city positioning that strengthens Belfast's role as the gateway to the region in a way that responds to key markets including:</p> <ul style="list-style-type: none"> - Business Tourism and sub-sectors within this group. - Leisure tourism target markets including - geographic considerations and the visitor journey.

3.16	<p>This theme takes forward a new approach that pushes beyond traditional marketing methods towards enabling the people creating the Belfast experience to tell their story. Therefore, the approach is narrative driven and the new plan sets out areas of support on:</p> <ul style="list-style-type: none"> - How do we tell Belfast stories? How do we enable people to tell their Belfast story? - How do we create an emotional connection with visitors? - How do we make local stories resonate internationally?
3.17	<p>The theme brings forward actions that support an effective way of working and will be particularly dependent on successful establishment of governance and leadership support mechanisms that will be strengthened to support the overall delivery of the plan.</p>
3.18	<p>Specific areas for feedback to be addressed in implementation plans and through work with Visit Belfast, Tourism NI and Tourism Ireland:</p> <ul style="list-style-type: none"> - Need to ensure that as well as a Gateway to Northern Ireland that Belfast is positioned as a must-see urban destination on the island of Ireland by capturing GB and ROI city break market and attracting greater share of Out of State visitors to Ireland. - Belfast Stories needs to extend beyond city centre proposal to strengthen and support organisations already tell stories across the city.
3.19	<p><i>Strategic theme 3: Experience Belfast</i> (supported by Visitor Experience Framework developed with CHL Consulting)</p> <p>The plan provides a summary of key actions to strengthen the coherency of Belfast's overall visitor experience. The plan contains strategic priorities that:</p> <ul style="list-style-type: none"> - include experiences that can be brought to life through the development of an optimal mix of 'anchor' and ancillary products that get people into an area and keep them there - focuses on encouraging international visitors to immerse themselves actively in the locale, interacting with people, engaging the senses and learning the history and stories of the places. - prioritises delivering immersive moments that inspire tourists not only to share their experience with others but also make them want to return to the city.
3.20	<p>This theme is critical to the overall success of the plan due to:</p> <ul style="list-style-type: none"> - the role of Belfast City Council in developing the Belfast experience through the development of Council assets.

	<ul style="list-style-type: none"> - Support for local initiatives and development plans through geographic or thematic based community development.
3.21	<p>In developing this theme, a number of pieces of foundational work have been completed including:</p> <ul style="list-style-type: none"> - A mapping exercise which maps our existing tourism assets against the city's 'Belfast brand' and Tourism NI 'Embrace the Giant Spirit' brand. - Assessment of the quality, market fit and sustainability of existing products. - Development of a proposed combination of thematic and geographical clustering. - Undertaken a gap analysis of potential experience-based products. The gap analysis reviewed what was missing from the tourism offer taking into consideration issues such as seasonality, immersive experiences, events and festival animation, and opportunities to meet local people for instance. - Consideration of investment and evaluation criteria for longer term priorities and programmes of support incorporating social, environmental and economic factors.
3.22	<p>Specific areas for feedback to be addressed in implementation plans include:</p> <ul style="list-style-type: none"> - Importance of investing in local tourism is recognised however this has to take a thematic approach as well as being geographic or place-based. There is an opportunity to develop clusters that helps to increase visibility of existing assets. - The overall visitor experience will only be delivered if there are also improvements in connectivity and accessibility.
3.23	<p><i>Strategic theme 4: Sustain Belfast</i> (supported by benchmarking of Belfast as part of Global Destination Sustainability Index)</p> <p>This theme is shaped by recommendations emerging from the benchmarking completed as part of Global Destination Sustainability Index. Members will be aware that Belfast signed up to this benchmarking following Committee approval in August 2020. The Global Destination Sustainability Index is the world's leading benchmarking and performance Index for cities, their events and their visitor economy. Its purpose is to engage, enable and inspire cities to become more sustainable places to visit, meet and thrive in. In addition to benchmarking a city's environmental strategy and social sustainability performance, the GDS-Index assess criteria that are industry specific: industry supplier support (restaurants, hotels, conference centres) and convention bureau strategy and initiatives. Alongside benchmarking it helps destination management organisations, convention bureaus, key</p>

	industry associations suppliers and clients to develop effective strategies and practices in support of sustainability goals.
3.24	<p>Since 2019, over 60 cities have started the process of benchmarking and assessment. The goal is to have 300 cities collaborating by 2023. The Index is based on 69 Indicators broken down into four categories:</p> <ul style="list-style-type: none"> - City Environmental Performance - City Social Performance - Supplier Performance - Destination Management Performance
3.25	<p>Belfast has now completed a second year of benchmarking resulting in significant improvement taking our place within top 20 cities. A series of related recommendations are included in <i>Make Yourself at Home</i>. A number of these relate to Visit Belfast's role as the Destination Management Organisation (DMO) and Visit Belfast have already made significant progress in implementing these as part of their current funding agreement with a commitment to build on this on a multi-annual basis. However, Council also has a direct role and recommendations within the plan include the establishment of a taskforce and a sustainability lab for tourism in Belfast. Further action is also set out in relation to improving Council owned assets and supporting the supply chain.</p>
3.26	<p>Specific areas for feedback to be addressed in implementation plans and as part of ongoing work with Visit Belfast on Global Sustainability Index and Tourism NI on regenerative tourism:</p> <ul style="list-style-type: none"> - There is a market imperative to support this area of work based on consumer attitudes as well as a social responsibility. - It is important for Belfast to maintain ranking on GDSI to ensure that we are striving to meet international standards. - As well as overarching sustainability principles there should also be support for develop sustainable tourism products.
3.27	<p>Catalyst Projects</p> <p>All four of these strategic themes are underpinned by the need to support inclusive economic growth and to differentiate the Belfast offer in an increasingly competitive global marketplace. A fifth strand to the plan considers key strategic opportunities that could</p>

	bolster investment in the sector in order to support recovery and future growth. These are catalyst or accelerator projects and are outlined below.
3.28	<p><u>Catalyst Project 1: Our Place – support for local tourism</u></p> <p>Adopting a place-based approach to the development of our neighbourhoods through local tourism investment that supports product development, jobs creation and destination management including the design and delivery of a Belfast Experience Development Fund to support product development. There are also opportunities to support capital development through alignment with existing programmes such as the Neighbourhood Regeneration Fund.</p>
3.29	<p><u>Catalyst 2: Make Yourself at Home</u></p> <p>This is a renewed commitment to long-term initiatives contained in the cultural strategy including signature Belfast events, International Year of Culture and UNESCO City of Music. The global summit of One Young World has been secured for 2023. A plan will be developed to bid for other major events that support the ambitions set out in the plan. Members will be aware that Belfast had planned to host a year of culture in 2023 in line with the original European Capital of Culture bid. However, the ongoing impact of COVID-19 at a city level in terms of the capacity of our local sector to deliver something of this scale in 18 months and the trajectory for the full return of international markets increasing makes this challenging. Therefore, it is now proposed that a multi-annual approach is taken forward focussing initially on the period 2022-24. Building on the cultural strategy, we have positioned events as one of the catalyst programmes for tourism to help contribute to the city's long term growth (visitor numbers, dwell time, spend and brand positioning) and in particular act as a key motivator for GB and Ireland visitors as part of the next phase of recovery. Over this initial period this would include at least 2 flagship events each with a critical mass of homegrown activity in 2024.</p>
3.30	<p><u>Catalyst Project 3: Our Stories</u></p> <p>Delivering the Belfast Stories as part of the tourism pillar of the Belfast Regional City Deal must be part of an overall integrated approach to tourism development and inclusive economic growth for the city. Belfast Stories will connect to local tourism product development and infrastructure through a hub and spoke model. Importantly the Hub will be an exemplar for responsible and sustainable tourism demonstrating the principles set out in the ten-year plan. Through the focus on Belfast Stories, the project will also be transformative for the positioning of the city. The development programme for this project</p>

	as part of BRCD is fully aligned to this tourism plan with cross-cutting priorities and synergies.
3.31	<p>Implementation</p> <p>The success of the plan will require ongoing review and delivery. To support this a number of key early actions have been identified including:</p> <ul style="list-style-type: none"> - Setting up of proposed governance and partnership model to drive the implementation of <i>Make Yourself at Home</i> - Scoping short and long-term investment priorities and financing strategy - Tailored action plans to address areas of priority.
3.32	Appendix 2 sets out priority actions for Year 1 of the new plan. This includes the development of a new investment programme for local tourism. The detail of this fund will be presented to Committee in due course setting out proposed process, criteria and timeframes.
3.33	Members will be aware that Council has supported local tourism conduits Fáilte Feirste Thiar and Eastside Tourism for a number of years under the City Connections Programme. This has included working in partnership to increase connectivity across the city, conducting consumer research and developing local partnerships. It is proposed that this programme is replaced by the new investment programme however in order to support transition and given that the new programme will not be operational until later in the year it is proposed that £25,000 is allocated (25% of previous annual investment) to these organisations.
3.34	<p>As part of implementation and in response to consultation feedback, a number key areas of development are identified for Council to lead including:</p> <ul style="list-style-type: none"> - A detailed accessible (inclusive) programme to include working with tourism sector to review communications, train staff and improve facilities. - A detailed sustainable tourism programme to address key weaknesses as identified by Global Sustainability Index (GDSI). - A detailed food tourism programme to support hospitality and food businesses focused on local produce.
3.35	<u>City Events</u>

	<p>Members will be aware that significant work has taken place in recent years to realign City Events with Council's wider cultural and tourism ambitions. This has included a renewed focus on working in partnership and developing programmes that support the local cultural sector and represent an authentic Belfast Experience. Included in Appendix 2 are the proposed events for 2022/23. Further detail on approach and programmes will be presented to Committee at relevant points throughout the year. Members will note that there are currently no plans to deliver Hallowe'en in 2022. It is proposed that this event is reviewed in line with the development work that has taken place on other events. This should include options for city events to represent greater cultural diversity within the city and how a partnership model could be developed. An update will be presented in due course.</p>
3.36	<p><u>Financial & Resource Implications</u></p> <p>There are currently no immediate new financial implications to this report. Appendix 2 sets out a breakdown of budget against programmes of work to be allocated from existing departmental budgets. Further detail on proposals for investment in local tourism will be presented to Committee in due course.</p>
3.37	<p><u>Equality or Good Relations Implications/Rural Needs Assessment</u></p> <p>The cultural strategy, <i>A City Imagining</i> is subject to an Equality Impact Assessment (EQIA) and a Rural Needs Assessment (RNA). A specific screening has been carried out on this associated tourism plan and was included as part of the consultation exercise. Mitigating actions have been considered as part of the implementation plans. Catalyst projects such as Belfast Stories will be subject to a separate Equality Impact Assessment. It is also anticipated that should any investment programmes emerge from this plan these will be subject to further equality screening.</p>
4.0	<p>Appendices – Documents attached</p>
	<p>Appendix 1: <i>Make Yourself at Home</i> – Planning for the future of tourism</p> <p>Appendix 2: Tourism and Events Priorities 2022/23</p>

A pink speech bubble with a torn, hand-drawn edge. It has a small tail pointing towards the top left. Inside the bubble, the text "MAKE YOURSELF AT HOME" is written in a white, bold, brush-stroke font.

**MAKE
YOURSELF
AT HOME**

A yellow star with a torn, hand-drawn edge. It has a small tail pointing towards the top left. The word "Belfast" is written in a dark blue, bold, sans-serif font across the center of the star.

Belfast

Planning for the future of tourism

Page 81

**We are a city that confounds expectations. A city that's like no other.
For a capital city we're small... compact. Our heart is big.
Our spirit strong. Our energy palpable.
Our character stout. Our humour dark.
And the craic is mighty.**

We're a great city that welcomes you with open arms - and we're ready to tell our stories to the world. For visitors there's the unforgettable experience of being in a city in transition - an edgy city that's on the move. Colourful, complicated, messy... and magnificent.

Because Belfast is a city that's rich in so many ways.

Richly storied: an early coastal settlement named Béal Feirste, enfolded by hills, rivers and loughs, this is a place with a long and complex history, a tapestry of narratives, and now a new story in the making.

Richly ornate: this industrial powerhouse of the 19th and early 20th centuries has lavish façades and gorgeous interiors - not just the grand civic buildings but its pubs and cafés and hotels.

And rich in culture, talent and creativity: with our history of making things, our extraordinary street art, our live music scene, our sporting legends and our unique dialect that helps give the city its different sound. Belfast's long been home to creators who dare to dream - industrial designers and innovators, technicians and craftspeople, as well as artists, writers and poets, music and film-makers.

There are other giants in Belfast too - the world famous story of the Titanic and the towering new edifice that marks its creation, the sleeping giant's silhouette on the ever-present Belfast hills that encircle the city, the huge yellow dockside cranes Samson and Goliath which dominate the skyline, the Peace Walls that open your eyes to the recent troubled past.

In one trip you can experience a cultural city, a vibrant evening city, a maritime river city, a university city, a foodie city and a historic city. Belfast's story is all around you - it's written (quite literally) in the paving stones and on the walls. And after a day or two here - walking the streets, hearing the stories, listening to the voices - you start to make the connections. You start to unlock the past. You start to understand the banter. You start to feel like you belong. Which is a nonsense, of course... but tourism's still relatively new here, and the people go out of their way to make you feel at home. There's a generosity to strangers that can take the visitor by surprise... but it shouldn't: it's part of the local DNA.

So... BELFAST IS READY. ARE YOU?

6

Catalysts
p29



5

Sustain
p23



4

Experience
p19



7

Making it
happen
p42



MAKE
YOURSELF
AT HOME

Belfast

1

Open doors
p5



2

Grow
p11



3

Position
p15





Chapter 1

OPEN DOORS

THE INVITATION

If future-proofed cities are a global aspiration, then now is the time for Belfast to stop chasing the horizon and realise that despite our complex challenges, we've had the solution all along. Our greatest asset is that of any city - our people. To have the confidence and belief that the rest of the world might be interested in a city situated at the northernly point of an island on the edge of Europe, is to reach into the heart of this pandemic and affirm that connection and social interaction are fundamental human needs. When our lives contracted to the footprint of our bricks and mortar homes, we promised that when life returned to normal, we would do things differently. As we open our doors again, as citizens and as a society, let us extend the invitation to make yourself at home to our neighbours, both local and global.

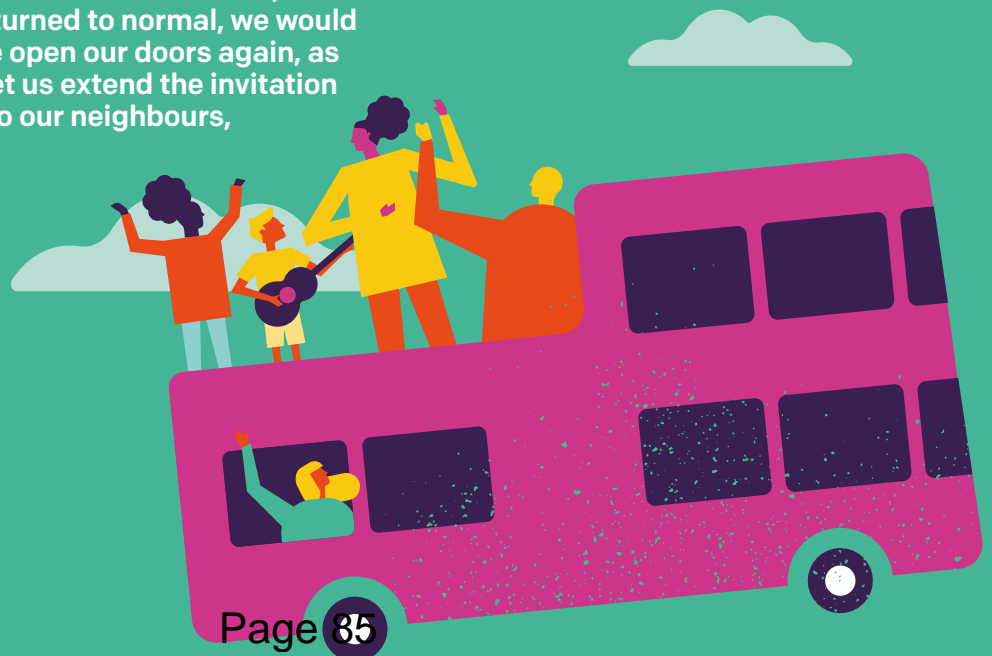


Image opposite:
Pottinger's Entry
by Irony

THE CHALLENGE

Tourism hasn't always had the best reputation with a tension between the economic and regeneration benefits of the visitor economy and the potential for negative impact on the local population and on the planet. Yet for a city such as Belfast, juxtapose this with the ebb and flow of people arriving and departing and we quickly realise that visitor mobility creates a permeability to our city that can enrich our own lives. This plan seeks to build on the success of tourism to date acknowledging both the investment of the public sector and the significant contribution of business, local enterprise and communities in taking risks and establishing, in a relatively short period of time, a city offer of culture, heritage and hospitality to be celebrated. The next phase of development should now commit to an inclusive approach that recognises the importance of tourism and global connectivity to our economic and social wellbeing, but to do so under the principles of being people-centred, responsible and sustainable. We acknowledge that the success of this plan will require closer collaboration with all of our partners and the need to continue to strengthen our relationship with Visit Belfast, Tourism NI and Tourism Ireland.



People-centred

This plan is centred around the local and the visitor and how to create the environment for interaction, engagement and exchange. This will include ongoing research that better understands the needs of the visitor and provides evidence of the inclusive benefits of tourism to local people, businesses and neighbourhoods.



Responsible

The role of local government in tourism development has evolved in recent years and is likely to continue to do so. This plan therefore sets out those key actions within Council's sphere of agency to affect positive change whilst also recognising our role in influencing and shaping policy and legislative reform in support of a visitor economy that will effectively serve the city and the region.



Sustainable

A people-centred and responsible approach to tourism development should align to sustainable development goals across economic, social and environmental spheres. This plan commits to striving to introduce models of best practice and to better understand the effects of our collective actions both positive and negative.

THE ECONOMIC IMPERATIVE

The early development of today's tourism industry in Belfast was largely organic, driven by the 'culturally curious' visitor who was keen to see, do and experience something a little different. To date this development has been largely positive with heritage-led investment projects such as Crumlin Road Gaol and the iconic architectural infrastructure of Titanic Belfast receiving overwhelmingly positive feedback from visitors and collectively drawing in excess of 1 million visitors in 2018-19.

Despite huge efforts, there is still a gap in scale and maturity of the local industry. Notably, NI lags behind the rest of the UK and Ireland with respect to tourism as a driver for Gross Value Added (GVA) with just 2.3% of NI's GVA attributable to tourism compared to the Republic of Ireland reported at approximately 3.9% and in Scotland at 4.1%. It was in this pre-COVID-19 context that Tourism NI set the ambitious target of doubling the value of the tourism industry to £2 billion by 2030.

A key element of opportunity is getting a bigger share of the international visitors coming to the island of Ireland to travel to Belfast and the Belfast region. As the gateway to the region, Belfast will be hugely significant to this growth ambition, both in terms of visitor spend and the creation of new jobs. It is therefore imperative that our destination is developed in a strategic way that maximises the economic and social benefits which can be derived from tourism for local industries, businesses and communities, as well as increasing visitor numbers and their spend and improving overall satisfaction levels. In the light of the ongoing COVID-19 pandemic it is imperative to plan for the future and to ensure that tourism continues to build as a key export for Northern Ireland. This plan therefore sets the target of doubling tourism revenue by 2030.



THE OPPORTUNITY

Belfast's ambition to attract more visitors who stay longer will depend on our ability to deliver memorable experiences. This relationship starts at the first point of contact with the prospective visitor which is now increasingly taking place within a digital space. For the traveller their connection to a place is established before their decision to visit. Whether through traditional media, online platforms or word of mouth we make certain associations with particular cities. In Belfast, we must continue to challenge perceptions of our city and establish new relationships with our global communities. In recent decades we have confounded expectations and for those who have made the decision to visit us, we have left them with a new appreciation of the place we call home. The opportunity now is to raise this bar and to move from confounding to celebrating.

By maximising our unique cultural assets and applying a creative approach to our marketing campaigns, we can create more engaging experiences for visitors that will leverage better overall tourism outcomes for Belfast and the NI region. Research indicates that international visitors seek authentic, immersive experiences that allow them to connect with the people and place. It is therefore no surprise that Council made the decision to invest in a ten-year cultural strategy and this tourism plan should be considered a further iteration of the ambitions set out in the cultural strategy, *A City Imagining*. If we recognise the value of culture to the lives of our citizens then by extension this should be shared with all those who chose to live, work and visit here. Belfast is a city of stories and storytellers. The diversity and richness of many of these stories is yet to be told or experienced.



THE PLAN

Four strategic themes will provide a framework for delivery that initially includes three exemplar catalyst projects. These will be supported by a new investment and governance model with measures of success aligned to the *Belfast Agenda* and *A City Imagining*, ten year cultural strategy. Our ability to work in partnership with government, tourism agencies including Tourism Ireland, Tourism NI and Visit Belfast alongside communities and the tourism sector will be critical to the successful delivery of this plan.

GROW

The role of tourism is critical to **city recovery**. For Belfast this will mean the stabilisation of the tourism industry and the requirement for further growth.

POSITION

This theme seeks to **strengthen Belfast's positioning** in national and international tourism markets - business and leisure - and as a gateway to the region.

EXPERIENCE

Increasing connectivity between existing and planned for tourism assets will improve the overall Belfast Experience, inspiring the visitor to stay longer, return and to recommend the city to others.

SUSTAIN

The **sustainable development** of cities is not just a local imperative it is also a key motivation for the visitor. This theme sets out how we do more, do it better - and together.



Chapter 2

GROW THE INVITATION

Alongside our contribution to the regional economy comes a responsibility to foster collaboration and transcend boundaries. Given the relatively small size of the destination, this is particularly relevant. The recovery potential of Belfast as a tourism destination and economic driver is strong in part thanks to the yet untapped potential in closer-to-home markets including Great Britain and Ireland. We need to keep growing our tourism product and investing in our people in order to answer fast evolving expectations of visitors. We have never had a better opportunity to create an exemplar model for inclusive tourism and in so doing foster the authenticity and vibrancy visitors are seeking. The benefits will be tangible - we need to measure them so that we can maximise them. The value of tourism to Belfast can be shaped by the people of Belfast.



THE CORNERSTONE

Belfast has played an essential role in the success of tourism in Northern Ireland to date and must now be a catalyst for recovery.

- We foster the international attractiveness of the region as a tourism destination
- We are an important part of the Northern Ireland and island of Ireland tourism journey
- We provide half of Northern Ireland's hotel capacity
- We attract higher value tourists and a larger proportion of four and five star hotels, driving tourism spend
- Tourism in Belfast has grown at a faster pace than the rest of Northern Ireland, mainly because of our competitiveness in two high value markets: city breaks and business tourism

The result is that up until 2019, Belfast tourism and hospitality sectors directly supported 19,300 jobs, accounting for one third of the sector in Northern Ireland.

However, we also know that these were the very strengths that left the tourism and hospitality sectors particularly vulnerable to the impacts of COVID-19. Belfast is more reliant on overseas tourism and we will continue to experience the sustained effects of the pandemic on city breaks, cruise holidays and business tourism.

What is critical, is that we address these immediate challenges to ensure that skills, talent and business viability are maintained to support recovery. We cannot lose sight of longer-term ambitions and

should continue to invest in the future through initiatives such as the Belfast Region City Deal to safeguard our forward resilience and potential for growth. The effects of the pandemic are far-reaching and ongoing, however we must ensure that when global tourism returns, Belfast is in a strong position to compete and to continue to increase the attractiveness of the destination.

**1 NIGHT
OUT OF 3**



Belfast accounts for 32% of Northern Ireland's tourism nights

**1 JOB
OUT OF 3**



Belfast supports 31% of Northern Ireland's tourism jobs

**£2 OUT
OF £5**



Belfast generates 40% of Northern Ireland's tourism spend

MORE THAN TOURISM

Belfast should continue to be a catalyst for the development of tourism in Northern Ireland and we need to better understand and monitor our performance as a city. Given the relatively small size of Northern Ireland, the impact of local authority collaboration can have a high impact. What benefits one local area, is likely to benefit another, as a visitor rarely observes strict geographic boundaries. Proposing a diverse and high-quality tourism offering is key to increasing the number of visitors and the average length of stay. In order to understand and grow the full value of tourism, it must be better monitored and measured. We need to move beyond bed nights as a measure of success to understand that the value of tourism can be felt and measured on many levels, providing insights that can inform future investment. We must also consider how Belfast tourism can:

- **Stimulate regional growth:** tracking credit card data rather than just occupancy rates, will help to understand how visitors move between city and region and the contribution of Belfast to Northern Ireland. We also need to better understand the value derived from business tourists who, beyond their conference, often extend their stay both inside and outside the city. In doing so, they become high value leisure tourists.
- **Contribute to wider brand positioning:** Business tourism also supports international attractiveness and foreign investments. World-class professional events contribute to perceived attractiveness as an innovative place to do business. This also contributes to a city's real competitiveness, fostering the development of a knowledge economy, sharing best practice, making business connections and ultimately creating a successful ecosystem.
- **Support inclusive economic growth:** Inclusive tourism, as defined by the UN, creates an environment for all parts of the city to benefit from tourism. This requires analysis to better understand access issues such as geographic or demographic challenges. The result should be a more tailored response to support job creation and skills development.
- **Regenerate cities:** Tourism infrastructure improves connectivity, which in turn creates a more permeable city, with the movement of people that can support further regeneration. For example, these benefits are often evident when considering the relationship between tourism investment and waterfront regeneration. There is a need to better understand this model and extend its application to city centre and neighbourhoods especially as part of the re-imagining of our high streets.

GROW ACTIONS

Actions will be aligned to key success factors to help develop the destination, ensuring short-term recovery and longer-term resilience and growth. This will be measured through the development of new key performance indicators and a city tourism dashboard.

Collaborate

- We must work together to improve the coherency and connectivity of the visitor experience. This should include all parts of the ecosystem such as government departments, Tourism NI, Visit Belfast, Belfast City Council, the private sector, the voluntary sector and other local authorities. Tourists do not recognise administrative boundaries and the NI destination is small. Belfast has a critical role to play in the success of Northern Ireland. This needs to be better understood and measured.

Measure

- We will improve the capture of data, the analysis of performance and the evidence-based approach to decision-making. This new tourism plan must build and establish an evidence base that can then be regularly reassessed and communicated to stakeholders.

Invest

- We will invest in tourism products that can adapt to fast-evolving demand, stimulate tourism jobs and maximise the benefits for locals. Investment will be aligned to the distinctive characteristics of Belfast as an authentic and vibrant place as set out in a new Visitor Experience.

Recover

- We recognise that growth ambitions must be grounded in the stark reality of the impact of COVID-19, not only on the tourism and hospitality sectors, but also on the creative and cultural communities who create the authentic Belfast stories that attract visitors and help position Belfast as a destination. Therefore, we must continue to provide short-term support for the tourism and hospitality sector to protect jobs and maintain the recovery potential of the sector post COVID-19. We also need to look at how innovation addressing immediate needs can contribute to sustainable changes - things like adapting the tourism offering to new visitor expectations (such as open spaces) and new markets that could continue to grow in the medium term (for example, local, GB, Ireland and parts of Europe).

Aspire

- We aspire to be an inclusive, authentic and vibrant tourism destination, with the ambition for Belfast to be recognised as a leading standard globally. The legacy of peace-building and the commitment to inclusive economic growth should be applied to tourism as a contributor to wellbeing.
- Major investment opportunities such as the Belfast Region City Deal, which includes the Belfast Stories (a new tourist attraction), will not only support the visitor economy, they will regenerate the city and improve connectivity. Investment in live events and creative industries, as well as the development of new experiences and infrastructure, can be positive accelerators to move from recovery to transformation.

Chapter 3

POSITION BOLD AMBITIONS

The Belfast Agenda sets out the belief that Belfast can be a city that people dream to visit. A place that is a vibrant, attractive, connected and environmentally sustainable. It also sets out long-term goals to grow the value of out-of-state tourism exponentially and to develop another world-class visitor attraction in the city. We recognise that tourism plays a vital role in the city's economy, its employment opportunities, especially for the young, and its support for small businesses and entrepreneurs. Further brave thinking came out of a setback, when our bid to be recognised as European Capital of Culture was cancelled due to Brexit. Determined to build on the momentum behind the bid, we produced a 10-year cultural strategy, *A City Imagining* that commits to bidding for UNESCO City of Music and to an international year of culture. Initiatives such as these, combined with plans for the new world-class attraction, the Belfast Stories, provide opportunities to put Belfast's people at the centre of our story and to begin talking about the city in a new way to the rest of the world. These signal a new approach to the positioning of our city and our home.



A WAY TO GO

Of course no one knew COVID-19 was on the horizon when these ambitious strategies and plans were developed. The city's growth markets of business tourism, city breaks and cruises have been hit hard by the pandemic. However, early thinking is that Belfast is in a good position to recover post-COVID-19 thanks to our connectivity (especially to potential growth markets in GB and ROI), our strong assets, our authentic experiences and our development plans.

Belfast is Northern Ireland's most-visited destination. More than half (52%) of all visitors to NI visit Belfast. Some 90% of NI business events take place in Belfast. It also encourages visitors to explore NI. In Tourism NI's Visitor Attitudes Survey 2018, 48% of visitors said they were influenced to visit Northern Ireland by the city of Belfast, 38% by Titanic Belfast and 16% by *Game of Thrones* locations.

Belfast has experienced exceptional tourism growth in the past decade. Out-of-state overnight stays to Belfast grew by more than 70% in the five years to 2019. The drivers for this growth were city breaks and business tourism - both high-value markets. Cruise tourism has also contributed: numbers of cruise ships docking in Belfast almost tripled between 2013 and 2019, overtaking Dublin. Belfast is seen as more than a city break for many. Some 42% of out-of-state visitors to Belfast also visited the Causeway Coast and Glens.

However, despite this growth, we continue to face perception challenges. A recent qualitative study across 12 countries found the city "is not yet recognised as having desirable emotional connections". It is thought of as a working city, rather than for one for tourism and a tourist destination, or at most "a work-in-progress" - appealing to early adopters.

Agencies such as Tourism NI and Visit Belfast use common themes in their destination marketing and these are picked up and repeated by the travel media. Yet to date, there is no simple shared positioning for Belfast that would strengthen our image and differentiate us from other UK or European cities. Tourism Ireland uses its emotive proposition '*Fill your heart with Ireland*' while Tourism Northern Ireland has developed its new '*Embrace A Giant Spirit*' brand. The focus of both is on the emotional, human connection.

When it comes to icons associated with Belfast, Titanic and *Game of Thrones* are used frequently - both visually and in words, for example 'Titanic City' and 'Home of Thrones'. While downplayed by the official tourism agencies in consumer marketing, the Troubles are almost always mentioned by external media - differentiating Belfast from other city destinations, but also invariably as a hook to tell the story of how the city has progressed into a peaceful and safe place: a city reborn that's worth taking a look at.

A STATEMENT

We've done a lot of thinking about Belfast's brand and image, especially in recent years. We have invested in both the city brand and a visioning narrative for tourism which have been developed with stakeholders, consulted on with local people and market tested.

Tourism NI has developed a bold new experience brand, 'Embrace A Giant Spirit', to take to market in partnership with Tourism Ireland over the next few years. The marketing and product development investment behind this will help to reposition Northern Ireland as a visitor destination. As its principal destination, it's essential that Belfast should be central to its implementation. Unsurprisingly, there is coherence between these pieces of work. Working with Visit Belfast and Tourism NI, there is an opportunity to ensure that the positioning of Belfast draws on and aligns with this work and investment. As well as the existing consumer-facing brands and narratives, the city needs a positioning statement that can be shared, with and used by, stakeholders to guide destination marketing and development.

The positioning statement is a set of concepts. Bringing these concepts to life - through creative marketing, visitor servicing and product development - will give us a clear competitive position in the market place. The positioning statement is not consumer facing, it is not a strapline, it will not have a logo, it is not marketing copy. It sits 'behind' the visioning narrative and city brand. It is to be used by us as a 'filter' to guide investment in tourism development and to select and shape marketing messages and content - to decide which experiences are developed and taken to market.

It is evidence-based. It draws on market intelligence - on what visitors currently feel and what we predict Belfast's target markets will look for in the future.

Our positioning statement is: **Belfast - a top urban destination on the island and the gateway to Northern Ireland - a city that confounds expectations and rewards curiosity.**

GATEWAY

Positions Belfast as the base from which to explore Northern Ireland and establishes its status as a principal destination and attractor on the island. It provides a strong reason to visit, and to stay longer.

CONFOUNDS EXPECTATIONS

Reflects the research and addresses lack of awareness of the breadth and richness of the city's offer. It challenges out-of-date perceptions of Belfast.

REWARDS CURIOSITY

Promises an intriguing city with layers of stories, a city that repays the effort of making the journey, delivers for the engaged visitor and is ripe for exploration.

POSITION ACTIONS

Plans for Belfast Stories and the themes of *A City Imagining*, already put stories front and centre in Belfast's tourism development and promotion. The task now is to ensure that the tactical implementation of these strategies match the city's positioning statement.

This is about doing things differently, rather than in addition. As a visitor, stories pull you in, hold your attention and create emotional connections. Belfast as a gateway is a win-win- not replacing what we have to offer but adding to it, raising our profile and providing a reason to stay longer. Digital platforms, technologies and spaces are tools that can showcase Belfast. It is interesting stories told by dynamic storytellers, that will lead to the successful positioning of Belfast.

Gateway

By fusing the city and region, Belfast can be seen as more than a city break and can become the gateway to the Northern Ireland experience and a must-see part of the island experience. This requires new levels of collaboration between partners to:

- Develop maps and apps to give an idea of distance and means of travel to places inside and beyond the city limits.
- Produce creative driven, thematic content to showcase regional experiences that have Belfast at their heart.
- Strengthen Gateway messaging on online platforms that promote the city and region.

Curated Stories

If Belfast is a city of stories, then we should provide a storytelling 'stage' in destination digital platforms for the city's players to act on. This moves city marketing from broadcasting orchestrated outputs to being a curator of stories, shifting from 'one voice' to 'many voices' through:

- User-generated content that can be shared via social channels and integrated into websites with incentivised use of hashtags (for example, share your #BelfastStory)
- Curated blogs supported by monthly guest editors, from the recognised name to the local. Contributors should include travel writers, bloggers, conference ambassadors, students, diaspora, experts (such as chefs and artists) photographers and museum curators.
- Third party content should be integrated into websites and shared via social channels

Storytelling Ecosystem

Only a fraction of what leisure and business tourism visitors see is through 'official channels'. It's Belfast stories of real people, delivering authentic experiences that the visitor is interested in. Success will depend on the ability to engage all parts of our tourism ecosystem. To create city ownership we will:

- Establish a stories framework and online platform for the city and link with plans for the new visitor destination - Belfast Stories.
- Provide practical tools to enable creativity and storytelling within the tourism sector that can tap into the visitor's desire for immersive moments that have a strong sense of place.

Chapter 4

EXPERIENCE

WORK HARD

Tourism is an experiential activity. People travel to experience another place, to find out about it and to enjoy what it has to offer. The experiences available in any destination are varied and may mix the exotic with the mundane, the exceptional with the ordinary, the memorable with the forgettable. They may be communal or personal, emotional or practical, significant or slight, good or bad. For the visitor, it is the cumulative impact of the range of experiences encountered in a destination that leaves its mark and dictates whether the visitor will recommend it to others and whether they will return again. For Belfast to be a successful destination, we know that we need to work hard at enhancing and enriching the experiences that we offer to our visitors to create compelling reasons to visit - and visit again.

DEVELOPING THE VISITOR EXPERIENCE

Our engagement with partners identified four priorities for council-led tourism development and support in the next decade:

1. Enhancing and enriching the visitor experience
2. Supporting tourism development across the city's neighbourhoods
3. Strengthening tourism and marketing communications in line with city positioning
4. Supporting skills development to enhance tourism growth and development

As a first step, we commissioned the development of a Visitor Experience Framework for the city which allows the city's tourism partners to agree on a number of unique selling points (USPs) that are authentic to Belfast and to coalesce buy-in for investment in a series of products and/or experiences that will give substance to those USPs. We want to give visitors a compelling experiential offer within a competitive tourism market that lives up to the expectations of new marketing campaigns which will be developed with our partners as part of the delivery of this plan. For our tourism partners, this will mean that investment becomes more focused, with greater potential for return and more opportunities for packaging and developing new experiences.

The Visitor Experience Framework, which has been co-designed with key tourism stakeholders, provides a more focused and co-ordinated approach to product and experience development in the city. This is required if we are to maximise the export opportunity that the tourism sector presents locally. The Framework provides an exciting opportunity to develop, showcase and promote Belfast's destination promise, acting as a catalyst to support the social, economic and physical regeneration across the city and its surrounding neighbourhoods. It acts as the implementation tool for this wider strategic plan and should be considered as part of a collective body of work.

The Framework will:

- Include experiences that can be brought to life through the development of an optimal mix of 'anchor' and ancillary products that get people into an area and keep them there.
- Focus on encouraging international visitors to immerse themselves actively in the locale, interacting with people, engaging the senses and learning the history and stories of the places.
- Centre around immersive moments that inspire tourists not only to share their experience with others but also make them want to return to the city.



BELFAST VISITOR EXPERIENCE FRAMEWORK



EXPERIENCE ACTIONS

Expanding our experience mix

- Titanic Belfast continues to act as the main attractor for the city, drawing visitors to Belfast. To enable Belfast to recover and grow, we need to get visitors to stay longer. This makes sense from both an economic and environmental perspective. Therefore we must make sure there is enough visible product in order to extend the dwell time of the visitor in the city and allow Belfast to compete with other city break destinations. This can be achieved through developing anchor and ancillary experiences to create a more coherent, accessible and compelling proposition for the visitor.

Connecting our neighbourhood tourism offer

- An impressive neighbourhood-based tourism offer has been developing in recent years. But for the visitor, this continues to come across as fragmented. Through clustering and capacity-building, there's an opportunity to uplift these individual experiences to be more market-focused. The relationship of smaller experiences to each other, and to the main city attractors, should be strengthened.

Better utilising our existing assets

- Belfast is rich in natural assets with the rivers and hills and characterised the physical landscape, although these remain largely under-utilised. Ongoing and planned development is taking place as part of the Maritime Mile, but there's an opportunity to build further on this. Greenways and Blueways have the potential to become an important part of the city experience and to change perceptions of Belfast. Accessibility of the Belfast Hills continues to be a challenge, but there's the potential to develop supporting products as part of a longer-term infrastructure plan.

Overcoming navigation challenges

- Despite the compact nature of Belfast, it's not an easy city to navigate without a car. The introduction of the Glider has improved this, but more work should be done to develop walking and cycling routes and to increase awareness and confidence through improved signage and wayfinding.

Animating our arrival experience

- First impressions count. Arrival and departure gateways are an important part of the overall visitor experience, not only in terms of providing information but establishing a connection with a place. Working with airports, harbour, rail and roads authorities, we can better animate these spaces through improved public realm and visitor servicing.

Developing capacity and skills

- The Belfast welcome is recognised as one of distinctive characteristics of our city destination. However, there's a need to build on this to create a consistency and reliability in the delivery of experiences. A long-term skills development plan to increase creative and technical capacity is required. This will ensure the quality of the visitor experience is also recognised as standout.

Addressing specific gaps and opportunities

- Further plans need to be developed to support the implementation of the Visitor Experience Framework. This should include priority areas such as a Food Tourism Actions to support the recovery and long term success of Belfast's hospitality sector as a contributor to Belfast's success to date. We must make clear commitments to accessible and inclusive tourism and this will be set out in a detailed and co-designed plan.

Chapter 5

SUSTAIN WELLBEING

Cities across the globe have been challenged by tourism. Some have been overcome with a volume of consumption that has left local residents hostile and infrastructure overrun. For others, the economic stimulus of the visitor economy remains elusive. Belfast was undoubtedly on an upward path, outpacing the rest of Northern Ireland. The COVID-19 pandemic has interrupted this exponential growth. However in doing so, it has provided a breathing space to ensure that tourism development and growth can align to the city's priorities of resilience and sustainability and deliver on the people-centred vision of the cultural strategy, *A City Imagining*. In line with new global thinking, this plan seeks to move beyond the 'do no harm' model, to a regenerative form of tourism that contributes to the economic, social and environmental wellbeing of our city.



GLOBAL DESTINATION SUSTAINABILITY INDEX

This theme will be driven by recommendations emerging from the benchmarking completed as part of Global Destination Sustainability Index (GDS-Index). In 2020, Belfast City Council agreed to sign up to the GDS-Index, the leading benchmarking and performance index for cities, their events and their visitor economy. Its purpose is to engage, enable and inspire cities to become more sustainable places to visit, meet and thrive in. In addition to benchmarking a city's environmental strategy and social sustainability performance, the GDS-Index assess criteria that are industry specific. This includes industry supplier support (restaurants, hotels, conference centres) and convention bureau strategy and initiatives. Alongside benchmarking, it helps destination management organisations, convention bureaus, key industry associations, suppliers and clients to develop effective strategies and practices in support of sustainability goals.

In 2019, over 60 cities had started the process of benchmarking and assessment. The goal is to have 300 cities collaborating by 2023. The Index is based on 69 indicators broken down into four categories:



PROGRESS

The roadmap for Belfast identifies two areas where Belfast City Council can make significant difference. The first is by taking on a clear leadership role, including advocating for the importance of sustainability. With this comes the commitment to lead through action, including in the management of our own assets and in making sure that city data is captured and performance is measured.

The Resilience Strategy gives us an excellent framework to do this. The challenge will be to uplift the importance of tourism in the implementation of this strategy and in future emergency planning. To help lead this work we will create a tourism taskforce.

Council's second critical role is to support capacity building by creating the conditions and incentives supporting city suppliers to adopt sustainable models of best practice. This will be a phased approach, recognising the challenges whilst articulating the benefits of regenerative tourism. In support of this we will create a sustainability lab for tourism to foster collaboration, develop new approaches and design legacy initiatives.



SUSTAIN ACTIONS

To support the ambitions of delivering a regenerative tourism model for the city, a number of actions will be delivered. These actions will directly improve Belfast's ranking on the GDS-Index.

Leadership

- Establish a regenerative tourism taskforce aligned to Belfast's Resilience Strategy.
- Work with Tourism NI and Visit Belfast to develop a regenerative tourism dashboard for the city with long-term commitment to research and data collection.
- Position sustainability as part of city positioning, celebrating best practice and developing clear messaging.

Destination management

- Support Visit Belfast to complete certification and include sustainability Key Performance Indicators aligned to UN's Sustainable Development Goals as condition of funding from 2022.
- Work with local organisations to gain accreditation and develop sustainability plans.



Suppliers

- Develop a certification strategy with appropriate tiers including the following targets:
 - 50% of hotels by 2023.
 - 40% of wider hospitality and accommodation sector by 2023.
 - 60% of funded cultural organisations by 2023 rising to 100% by 2025.
 - 50% of funded event organisers by 2023 rising to 100% by 2025.
- Integrate sustainability credentials in recovery funding to unlock financing for industry development.
- Provide direct support to ICC Belfast to complete certification by 2023 including retention targets.

Food and drink services

- Organise training on sustainability for restaurants and caterers.
- Create a sustainability lab to accelerate circular thinking, policy and initiatives among hotels and restaurants.
- Promote and incentivise sustainability certifications for restaurants and caterers.

Partners and visitors

- Support partners with ideas and resources to support local social, environmental or economic causes and projects.
- Develop a corporate social responsibility policy for the city, to encourage visitors and partners to contribute to social and environmental wellbeing.





Chapter 6

CATALYSTS

LEGACY

We have identified three catalyst projects which we believe have the potential to be living exemplars of the vision, principles and themes set out in this plan. Each project has been designed to deliver, not simply due to scale, but rather a lasting and sustainable impact that can only be derived from strengthening, supporting and enabling our city to tell its story to the world. The legacy of this plan will be its contribution to create a new environment for creativity and enterprise to thrive. In particular, these projects are a statement of intent by Belfast City Council to continue to invest in delivering the ambition of the Belfast Agenda - for Belfast to be a culturally vibrant and welcoming city.



1. OUR PLACE

Developing local tourism

Regenerative tourism is driven by the relationship between people and place. The strategic themes of this plan uplift the importance of community in the context of tourism - and in particular, the relationship between the visitor and the host.

For a number of years, Belfast has had aspirations to take forward a community tourism framework. However, the risk with this approach is to create a hierarchy of importance - a two-tiered system defined by geography or theme. This has now been superseded by a new appreciation of the symbiotic relationship between city centre and

neighbourhoods, city and region, local and global. This plan places community at its heart. Respect for the local context, to ensure tourism-derived benefits are shared and inclusive, is evident in all four of the strategic themes - *Grow, Position, Experience and Sustain*.

As exemplars of the themes, all catalyst projects are designed to be people-centred. However, there is a need for a specific programme to support the development of local or neighbourhood-based tourism experiences. Neighbourhoods are uniquely positioned to offer the visitor the immersive experiences they are seeking:

**Celebrating
local culture,
heritage and
enterprise**

**Accessing
open and
green spaces**

**Co-creating
authentic
Belfast
experiences**

**Enjoying
day to night
food and
hospitality**

The Belfast Region City Deal identifies tourism as a key pillar. As part of this major programme, Belfast Stories will be the city's flagship investment in product development in the city. We want to make sure this investment maximises the potential for citywide, inclusive growth in Belfast. To do this,

we believe that it's critical to work in partnership to develop plans that build capacity for city neighbourhoods to meaningfully connect into the emerging broader tourism offer and to enable these local communities to become part of the Belfast visitor experience.



PRIORITY PROGRAMMES

This is both an exciting and challenging opportunity for stakeholders across a diverse range of sectors (tourism, public and private, culture, art, heritage, sport, community and voluntary) to engage in the process of co-designing authentic and sustainable cultural tourism products that will bring vitality to their own neighbourhoods, local residents and visitors alike. To this end, we propose that support should focus on the two main areas of infrastructure and product development. These programmes should support the development of community tourism both in terms of geographic communities but also communities of interest and thematic clustering. This is in addition to the actions set out under the four strategic themes contained within this plan.

INFRASTRUCTURE

- **Support for visitor servicing and information access points across the city** - including support for visitor servicing based in local areas.
- **Quality and innovative signage, interpretation and wayfinding** - including developing new digital approaches.
- **Developing Council owned visitor attractions, parks and open spaces** - including experience development plans for Belfast Castle, Belfast Zoo, Malone House, Templemore Baths, the Tropical Ravine and Palm House, and cemeteries including the City Cemetery.
- **Inclusion of tourism as a priority in the Neighbourhood Regeneration Fund**

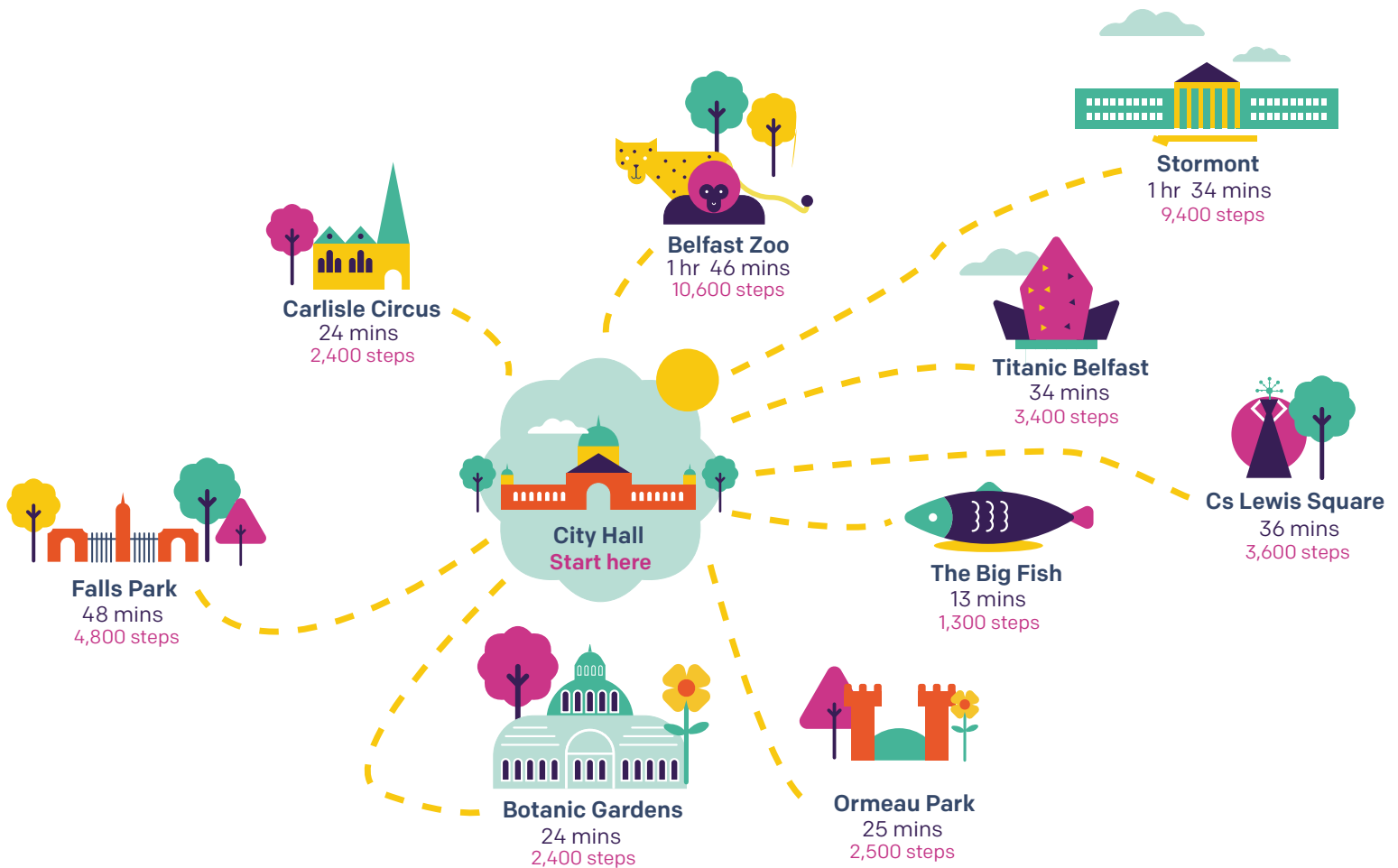
PRODUCT DEVELOPMENT

There is an opportunity to enable local communities to tell their stories and in so doing, create tourism experiences that respond to market research and consumer demand. Current trends are for experiential products and packages offering ease of access and a high-quality visitor experiences. Walks, trails and tours can package multiple products into an attractive and connected 'experience' within neighbourhoods. In order to facilitate product development in city neighbourhoods, we will launch an Experience Development Fund. This will support the development of tourism 'clusters' including:

- **Support from tourism experts to enhance existing products or research, or to develop and pilot new products that maximise opportunities to link with the wider city offer and ensure customer and market-led focus.**
- **Investment to bring these products to market.**
- **Long term capacity building to ensure all parts of the city have the opportunity to benefit from tourism investment.**

This programme will be implemented as part of the Belfast Visitor Experience Framework.

GET LOST... IN BELFAST





2. MAKE YOURSELF AT HOME

Establishing Belfast as a cultural destination

Belfast's cultural strategy, *A City Imagining*, recognises the importance of events and programming to the wider cultural and tourism profile of Belfast. Events can tell stories, connect people and present new perspectives on our place. As cities emerge from COVID-19, consumer sentiment research is already indicating that events will take on a new significance as motivators for travel and an opportunity for destinations to differentiate their offer. Events can create immersive spaces for the visitor to become part of an ever-evolving story.

The cultural, social and economic impacts of events cut across all areas of the Belfast Agenda. In 2017 the decision to bid for the European Capital of Culture indicated that there is a desire to enhance the quality and ambition of the cultural offer in Belfast through closer partnerships within the city, across the region and internationally. Importantly, the process revealed the creative potential of our city that could be realised if we had an environment where ambition was encouraged and rewarded. Since then, there have been high levels of support for a designated year of culture for Belfast. There has been recognition that in order to maintain civic momentum, secure buy-in from city partners and build the capacity of our cultural sector, a well-considered, well-planned cultural programme of scale and ambition is critical. These plans had originally focused on 2023, however with the impacts of the COVID-19 pandemic ongoing, we believe that we should take the time to recover, to dig where we stand and to rebuild the city from the assets that surround us. We are therefore setting out a six-year multi-annual approach with a renewed commitment centred around the need to invest in our creative communities.

The benefits of events and cultural programmes to cities are considerable. Many cities have used events to engage with local people, build civic pride and transform their reputation internationally. Events are one of the best ways to measure the economic, social and environmental impact of tourism as they bring together a cross section of city stakeholders. Importantly they also have the ability to create legacy.



THE PROGRAMME

In 2021 we will launch a programme designed to build momentum towards a year-long celebration of culture and Belfast stories in 2024. There will be important cultural milestones in 2022 and 2023 as Belfast plays host to a number of significant and ambitious projects. Belfast will be home to international events such as One Young World, the leading global event for young leaders, as well as the global Music Cities conference, and the city will be transformed into a forest of creativity in partnership with the Eden Project Cornwall.

The target will be to restore the international visitor economy to 2019 levels by 2024 and to help competitively position Belfast to move into a new phase of growth. This next phase of development will take us to 2027 and the opening of the new visitor destination - Belfast Stories, marking the establishment of Belfast as a cultural tourism destination. This sustained programme of activity, further reinforced by our own annual calendar of signature events, will help attract visitors back to our city, providing a much-needed boost for citizens as well as the cultural and hospitality sectors, and the wider tourism industry.

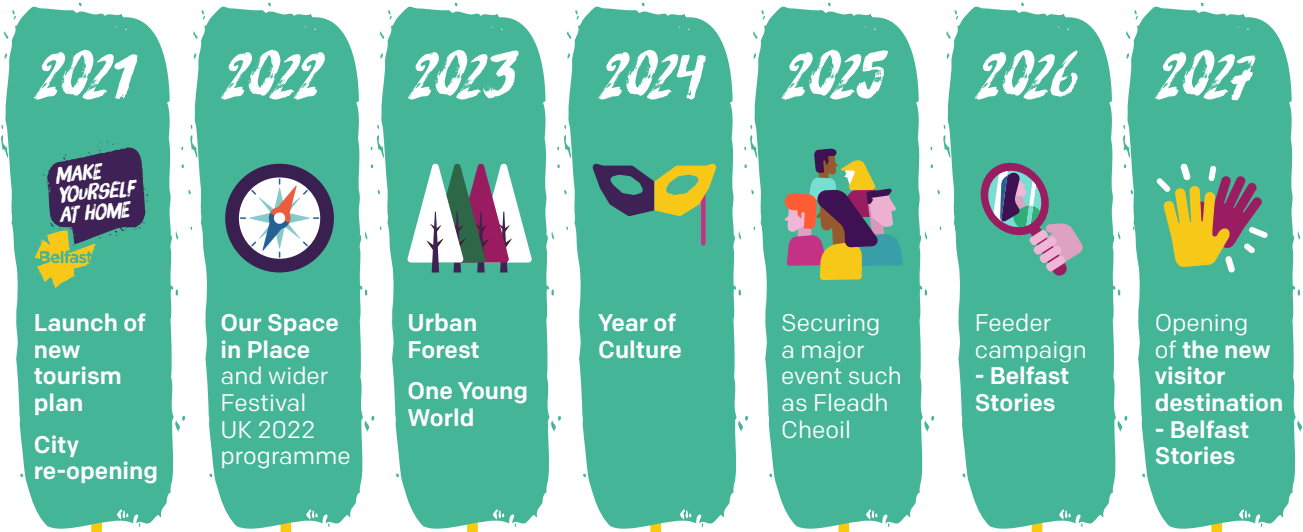
Importantly, this approach to long-term planning for events will be an exemplar for the four strategic themes of this plan: *Grow, Position, Experience and Sustain*. These events will:

- Directly contribute to the growth of the tourism industry in Belfast through an increase in out of state visitors, dwell time and spend.
- Challenge perceptions of Belfast and raise awareness of the diversity and richness of the city's culture, arts and heritage.
- Create authentic and contemporary Belfast Experiences of quality.
- Establish a model for carbon neutral activity.

Events of this ambition have the potential to be truly transformative. They will tell contemporary Belfast stories with an unprecedented international reach by fusing digital and real-life experiences. They will leave a lasting legacy of skills and capacity that will support future generations of tourism ambassadors, creative talent and storytellers. *Make Yourself at Home* takes the ambitions set out in our cultural strategy, *A City Imagining* and makes them real - Belfast will be an Urban Forest, a UNESCO designated music city, the meeting place for our global young leaders - and so much more.



MAKE YOURSELF AT HOME



UNESCO CITY OF MUSIC INITIATIVES

MAIN CREATIVE FOCUS
Over three-year period that sets out Belfast's ambition as a city that challenge perceptions

STRATEGIC PHASE 1
Raising profile and building capacity

STRATEGIC PHASE 2
Welcoming visitors to Belfast

STRATEGIC PHASE 3
Belfast is established as a cultural tourism destination

3. OUR STORIES

Introducing a new visitor destination

Imagine if there was a unique place in the heart of Belfast. A place where real stories of love and loss, conflict and peace, history and hope are told by the people who have lived them. A place where you not only get a true sense of the city of Belfast - past, present and future, but also gain new insights into the basic human needs of belonging and homeland. A place where age old stories of identity are told in a new way - a way that looks forward. A place that embodies the best of Belfast.

Belfast Stories is a transformational project designed to capture the unique spirit of Belfast. This major regeneration and tourism anchor will help revitalise our city centre, allowing people to connect with the city and one another through stories, screens and social spaces.

The beating heart of the new attraction is a visitor experience that tells the remarkable first-person accounts of the city by the people who call it home. Stories spill out into every aspect of the venue including the new state of the art Belfast Film Centre, offering specialist cinema content from NI and around the world.

Within the new visitor destination - Belfast Stories, an integrated cultural, educational and commercial screen industry centre will provide working, networking and training facilities to ensure Northern Ireland's screen industry continues to grow and foster new creative talent.

This new destination will be connected by dynamic architecture and vibrant public realm, allowing for lively event programming and conversation. It will offer the best of our local food and drink as the stories of Belfast unravel through all areas. The rooftop urban park and restaurant will present 360° views over our vibrant metropolitan city.







THE AMBITION

We believe Belfast can be a leading cultural visitor destination. Belfast enjoys a strength in its current gateway role for NI and Ireland. Belfast Stories will be a tourist attraction; a cultural beacon for the city; an anchor for the wider Belfast experience and a place of orientation for visitors to the region.

Successful regions have strong and vibrant cities at their core. Belfast is no exception as the city drives much of the economic growth and shares its wealth across the region. Through the Belfast Regional City Deal, we have the opportunity to fulfil our plans to create a significant and complementary star attraction in the city centre, providing more reasons for people to visit and things to do, while supporting new and better jobs.

In a very competitive global tourism marketplace, we know that the only true differentiator is Belfast: its story, its character and its people. Following thousands of conversations with the Belfast citizens over the last five years, we know that Belfast is ready to share its stories with the world in innovative ways and to celebrate the place we call home.

The new visitor destination - Belfast Stories will bring an economic and financial return for Belfast, but the benefits stretch way beyond the direct dividends of

a new tourist attraction. Clustering is a well-tested and long-established concept in cities across the world, with growing relevance to tourism and city centres. It provides both operational benefits and wider enhancements to the brand and appeal of the components parts through increasing footfall, providing economies of scale, promoting cross-pollination of ideas and revenues resulting in a greater impact than the sum of the parts.

As global competition increases, Belfast Stories will support Belfast in its role as the gateway to the region. It will support recovery and drive a new approach to inclusive growth and the region seeks to re-establish ambitions for a £2 billion tourism economy by 2030.

Our plans for Belfast Stories are ambitious, inclusive and support the plans for the Belfast we want to create.

THE IMPACT

PRODUCING £15 MILLION RETURN

Estimated annual tourism GVA benefit (not including indirect or induced benefits).

WELCOMING 700,000 VISITORS

Annual visitors to Belfast Stories, Screen and Skills.

CREATING 1,400 JOBS

Direct 132 FTE with 243 in the wider economy and 1,064 in construction.

Chapter 7

MAKING *it* HAPPEN

There is an impetus to make change happen that is shaped both by the urgency created by a global pandemic and the organic evolution of a city increasingly confident of our place in the world. The challenges and opportunities that this presents can be reconciled through innovation. Throughout the strategic themes and proposed catalyst projects, we have sought to move forward with new approaches to tourism development that build on the successes of the past. However, innovative approaches and new thinking are required for how we do things (differently) as much as they are for what we do. The principles of being people-centred, responsible and sustainable are therefore applied to putting this plan into operation - through setting out proposed models of collaboration for governance, investment, skills development and measuring success.

Partnership will be critical to the success of these plans. This will require greater collaboration between main agencies such as Council, Tourism Ireland, Tourism NI and Visit Belfast as well as a new ways of working with tourism businesses, cultural organisations and the community sector. This will include both a thematic and place based approach to development and delivery, directly recognising the important role of organisations such as Maritime Belfast Trust, Fáilte Feirste Thiar and Eastside Partnership as well as the business improvement districts. It also recognises that there are areas of the city where this capacity and infrastructure needs developed and neighbourhood based assets will be an important way to do this.



GOVERNANCE

Effective governance is critical to the successful implementation of this plan. This will help provide clear ownership of actions and will support the optimal collaboration and coordination between a complex group of stakeholders including the tourism sector, government, business and community and voluntary sectors. The incentive for city stakeholders is to collectively ensure that tourism is positioned as a major city driver, generating economic activity and employment, and serving as a powerful instrument for city and regional development that will support inclusive growth and social wellbeing.

Rationale

- The actions set out in this plan will be championed by Belfast City Council, but their implementation will require the close collaboration of different partners. We know that we will need partnership working across the city and region. This tourism plan sits under the Belfast Agenda and as such, we must continue to commit to developing multi-stakeholder city models of delivery.

Structure

- A City Leadership Group will be established to ensure that the importance of tourism is recognised and championed as part of city recovery.
- An Implementation Group will be set up to drive forward progress on the actions set out in this plan.
- The Implementation Group will bring together senior representatives of the tourism industry, the public sector, the wider business sector and community and voluntary sectors. These representatives should have the agency, influence and commitment to deliver this plan and make change happen.
- The Implementation Group will be established for a fixed period of no more than three years. A review

will be carried out at the end of this period with recommendations for the future.

- A Tourism Futures programme will also be established to support new ambassadors and leaders that will have a voice in shaping tourism development in the city.

Process

- The Implementation Group will report on progress, achievements and deliverables at six monthly intervals. Belfast City Council will co-ordinate reporting, working with partner organisations involved in the delivery of individual actions. A particular focus will be on emerging barriers or constraints that challenge progress against actions and developing solutions to overcome these.
- An annual Tourism Stakeholder Forum will be convened to share insights and understanding on performance to date and on measures that need to be introduced to accelerate progress or to address issues. An Impacts Report will be published annually alongside results of an attitudinal survey of residents on the benefits of tourism.

INVESTMENT

The ambitions set out in this plan will require a new way of working and investment in people, product and place.

The Belfast Region City Deal is a transformational investment programme that includes a cross-cutting Employability and Skills pillar that supports other pillars like Tourism and Regeneration. There's a need to support recovery and growth through tailored interventions delivered alongside tourism and skills development partners. The catalyst projects in chapter 6 require dedicated investment strategies (which are underway). We also need year-round investment aligned to the plan themes.

Grow. Investing in a new research and data-driven tourism approach including:

- Establishing an evidence-based proposition that Belfast acts as the regional catalyst.
- Measuring of the attractiveness of the city as a destination and how this plays a key role in maximising the economic impact of each visitor by increasing average length of stay and daily spend.
- Evaluating accelerator or catalyst project impacts.
- Broadening economic measures to include areas such as brand value.
- Introducing social, cultural and environmental measures to better understand and advocate for the true value of responsible tourism growth.

Position. Investing in a new approach to marketing and communications including:

- Enabling the people creating the Belfast experience to tell their story.
- Uplifting Belfast's USPs in campaigns and initiatives with specific support for Belfast's authentic food and drink offer and UNESCO City of Music bid.
- Extending Belfast's reputation as a welcoming city to ensure inclusivity of all potential visitors. This includes working with the industry to create an Accessible Tourism plan.

Experience. Belfast's ability to develop the visitor experience will be critical to attracting more visitors and increasing length of stay. This will require prioritising tourism within infrastructure programmes and launching a new Experience Development Fund including:

- Developing experiences that can be brought to life through a mix of 'anchor' and ancillary products that get people into an area and keep them there.
- Focusing on encouraging international visitors to immerse themselves actively in the locale, interacting with people, engaging the senses and learning the history and stories of the places.
- Delivering immersive moments that inspire tourists not only to share their experience with others but also make them want to return to the city.

Sustain. Belfast's Global Destination Sustainability Index benchmarking provides a roadmap for change. There is now a need to invest in the implementation of recommendations including:

- Developing results-driven plans for council assets including working with ICC Belfast to secure accreditation.
- Developing a tiered certification strategy for suppliers including funding support to help / incentivise suppliers achieve 3rd part accreditation.
- Sustainability training for suppliers with tailored programmes for food and drink industry and events sector.
- Include sustainability criteria and KPIs in funding contracts including Visit Belfast.

Advocacy. The future of tourism in Belfast and the region requires innovative approaches to investment and collaboration. While areas like passenger duty and visitor levies are not within the remit of the Council, we'll adopt policy positions based on up-to-date research and evidence.

SKILLS DEVELOPMENT

Like all cities, our greatest asset is our people. Tourism is very much a ‘people business’ and the visitor experience is highly dependent on the interactions with those who work across a range of customer touch points.

With almost 20,000 employees in 2019, tourism and hospitality is a significant employer in Belfast. The sector was devastated as a result of COVID-19 and is slowly emerging from a series of restrictions that required operators to put new ways of working in place to ensure compliance and address customer safety concerns. It's likely that the sector will continue to need support for some time to build back, given the likelihood that some restrictions may remain in place.

Outside of the challenges created by the pandemic, the tourism and hospitality sector was already facing staffing and skills challenges as a result of the UK's exit from the EU and the associated changes to migration policy which made it more difficult to attract talent to the sector.

As we move towards a rebuilding of tourism and hospitality in Belfast over the coming years, there are a number of priority skills interventions that will be required to ensure that there is both the volume and level of supply to meet the projected demand and deliver on our ambitions for growth.

Our priority areas of intervention will include:

Enhancing the attractiveness of the sector to new talent:

- This will entail working with businesses to look at how tourism and hospitality can be seen as a sector of choice, where employees can enjoy fulfilling careers. In addition to selling some of the existing

advantages, it may also require work to look at issues such as terms and conditions, working patterns and progression pathways, with the aim of attracting a wider profile of entrants into the sector.

Building management skills:

- The sector will require strong leadership to bounce back from the recent challenges. This will involve additional investment in management and leadership skills for existing staff. There will also be a growing demand for additional leadership investment in order to explore new business models, build strong teams and deliver customer excellence to underpin our world-class experiences.

Business resilience:

- COVID-19 exposed weaknesses across many sectors in fields such as digital technology. As visitor expectations change and the user experience evolves, it is essential that businesses and their employees are skilled in the use of these technologies- and that they explore how they can give their business a competitive advantage.

Entry and progression pathways:

- We have had some success through our Employment Academy model, helping businesses to meet their workforce needs. We will continue to work with local companies to ensure that they can have access to a strong pipeline of talent, creating both entry and progression pathways to fulfilling careers in sustainable and dynamic businesses.

MEASURING SUCCESS

An interactive city dashboard will be created with Key Performance Indicators developed to include:

- Number of jobs supported and economic impact
- Number, origin and type of visitor
- Occupancy rate of hotels and number of rooms per type
- Mapping of rooms in alternative types of accommodation (for example, Airbnb) including volume and average price
- Number, size and economic impact of business tourism events
- Quality of the experience (for example, proportion of attractions with Trip Advisor Certificate of Excellence or equivalent)
- Overall GDSI index rating

WHAT WE WILL DO

Grow

- Analyse available data to help understand the economic impact of visitors and their movements in and beyond the city. Currently, data based on occupancy bed nights does not accurately reflect the economic contribution of the day trippers who stay in Belfast but visit the rest of NI during the day.
- Explore and implement effective ways to analyse the real value of business tourism.
- Benchmark tourism monitoring reports of other cities to understand best practice.

Experience

- The key source of qualitative data has traditionally been the Visitor Attitude Survey carried out by Tourism NI. There is an opportunity to complement this and maximise the development of qualitative data on social media and through other online tools.
- Qualitative data will include the visitor experience, consumer satisfaction, product gaps, Belfast's USPs and stand-out experiences.

Position

- Survey the top five words that come to mind of visitors to track the changing perception of Belfast and NI and analyse how visitor behaviours are evolving. This will inform investment decisions and enable the respective tourism offerings of Belfast and the rest of NI to complement each other.
- Media monitor over longitudinal period to analyse what other people are saying about the city, including key words from the positioning statement.

Sustain

- Ongoing participation in the Global Destination Sustainability Index to monitor Belfast's progress against regenerative tourism targets and sustainability credentials. Performance will be measured in the following areas: Environmental (city), Social (city), Destination Management and Suppliers.
- Conduct an attitudinal survey of residents to help assess the perceived and real value of tourism.
- Produce an analysis per social group and per neighbourhood to assess access to tourism benefits and inform initiatives that support jobs, skills, training or increased event access.

WHAT HAPPENS NEXT...

Make Yourself at Home is an invitation that welcomes the visitor to Belfast. It also invites the people of our city to get involved, to tell our stories and to shape how tourism is delivered over the remainder of this decade. We hope that this draft plan will build on the work undertaken during the development of our cultural strategy and signal a new approach to developing and engaging with tourism in Belfast. We completed a 12 week public consultation in February 2022 and we've taken feedback on board as we now move to implementation of these ambitious plans. This vision for tourism places people at the heart so we will be following through on our commitment to an ongoing process of engagement, collaboration and partnership working. Should you require the document in a different format please email culture@belfastcity.gov.uk with your request.





Belfast

**Place and Economy Department
Economic Division
Appendix 2
Tourism and Events Update
2022/23 Priorities**

Culture and Events 2022/23 Priorities

Project Name	Project Description	Actions/ Targets	Timeline	Budget
Neighbourhood Tourism				
Investment Programme – local tourism	<p><i>Make Yourself at Home</i> commits to developing product development and infrastructure funds specifically designed to support local tourism.</p> <p>A detailed report will be brought back to Committee setting out proposed process, timeframe and criteria. Initial work has indicated that this programme will have multiple strands recognising that one size does not fit all. It will also include capacity building for those areas of the city or organisations that are at an earlier stage of development in terms of readiness for investment.</p>	Launch of programme Q2.	April 2022 – March 2023 Committee report: June 2022	TBC – subject to further Committee update
City Connections	<p>Ongoing partnership model between Fáilte Feirste and Eastside Partnership to deliver a programme of work that supports development of local tourism products and citywide connections.</p> <ul style="list-style-type: none">• Complete market research.• Support for local businesses through joint initiatives.• Support for delivery partners	Research completed. 2 collaborative projects delivered.	April 2022 – June 2022.	£25,000
Ambassadors Programme	<p><i>Make Yourself at Home</i> commits to building capacity at a local level including a Tourism Futures programme to invest in a new generation of leaders. This programme will be scoped with proposed process and criteria brought back to Committee for approval.</p>	20 individuals supported to compete programme.	April 2022 – March 2023 Committee report: June 2022	TBC – subject to further Committee update

Tourism and Events 2022/23 Priorities continued

Project Name	Project Description	Actions/ Targets	Timeline	Budget
Research and Development				
Developing Council’s assets	<i>Make Yourself at Home</i> identifies the need for Council to utilise existing assets across the city to drive the visitor experience. Council’s own assets should reflect the priorities of the plan in terms of quality and sustainability. It is proposed that an audit takes place of Council’s existing tourism assets with assessment of which assets are best placed to complete a development programme with accompanying long-term plans including phase 1 actions.	Up to 6 development plans for Council owned assets.	April 2022 – March 2023	£80,000
Ticketing Platform and Visitor Pass	Previous work has indicated the lack of digital infrastructure to support visitor servicing in the city. The potential for a centralised ticketing platform and visitor pass similar to what operates in other cities will be assessed.	Feasibility with preferred option identified.	April 2022 – March 2023	£27,800
Accessible Tourism	The new tourism plan identifies the need for a accessible tourism programme to deliver training, skills and capacity building to the tourism sector to improve the accessibility of Belfast’s current tourism offer.	Completion of programme by 50 businesses/ organisations in year one.	April 2022 – March 2023	£30,000
Food Tourism	Food tourism is identified as one of the city’s unique selling points including the promotion of local/ regional produce. This sector has been impacted by the pandemic. It is proposed that Council deliver a tailored programme of support that positions food as part of destination promotion year round as well as uplifting authentic food offer as part of the events and festivals offer.	Food programme introduced to all City Events. Engagement with businesses. Review of marketing.	April 2022 – March 2023	£30,000

Tourism and Events 2022/23 Priorities continued

Project Name	Project Description	Actions/ Targets	Timeline	Budget
City Events				
	On an annual basis, the Council’s City Events Unit delivers a series of large-scale public events, which are free to access by both citizens and visitors to the city, on behalf of Belfast City Council. The Tourism, Culture, Heritage and Arts Unit also support a number of annual programmes and activities. Our cultural and tourism strategic priorities sets out long-term recommendations for events in the city including better alignment across the Council in the design, delivery and funding of events.	3 largescale city events attracting local audiences and out of state visitors measuring socio-economic impact.	June 2022- March 2023..	As detailed below.
Christmas	Building on 2021 that focussed activity on an opening weekend of family friendly activity and animation on subsequent weekends throughout November and December.	Large-scale commission working with local creatives.	April 2022- December 2022.	£182,864
St Patrick’s Day	Building on success of 2022 and new model. An evaluation and next steps will be presented to Committee in May 2022 detailing proposed approach for 2023.	Development of new model including parade, concert and citywide music programme.	June 2022- March 2023.	£240,000

Tourism and Events 2022/23 Priorities continued

Project Name	Project Description	Actions/ Targets	Timeline	Budget
Maritime Weekender	<p>It has been agreed to deliver the full Maritime Festival on a biennial basis in order to grow ambition, budget and impact of the Festival. In 2022 it is proposed that activity follows a similar format to 2021 alongside activating international commissions for the return of the Festival.</p> <p>The Festival has been successfully delivered as apart of a partnership model. A Service Level Agreement will be drawn up in 2022/23 with Maritime Belfast Trust to support the delivery of this activity.</p>	<ul style="list-style-type: none">Commissioning a large scale work for Festival.Reaching 20,000 audience through current year programme.Securing match funding	April 2022- March 2023.	<p>£159,000</p> <p>£100,000 (MBT)</p>
Events Development				
International Events	<p>Working with city partners to plan ahead for bids that best align to strategic priorities and maximise legacy.</p> <p>Ongoing review of Council delivered events and collaboration with extensive range of events and festival funded by Council across the city and across the year.</p>	<p>Establish a city events calendar and collaborative programming approach.</p>	April 2022- March 2023.	£30,000
Culture Night	<p>Committee agreed to co-commission with Cathedral Quarter Trust a review of Culture Night. A new approach to Culture Night will now be taken forward that refocuses the event on quality audience experience and support for local cultural sector. This will include development activity in 2022 and 2023 leading to large-scale event in 2024 as part of Year of Culture.</p>	<ul style="list-style-type: none">Commissioning of contentEngagement with audiencesRelaunch of brand	April 2022- March 2023.	£80,000
Small Grants				
Project Funding	<p>Support for Sport grants to ensure development and delivery of community based sporting events.</p>	<p>Support for local organisations with up to 15 projects supported.</p>	April 2022 – March 2023.	£70,000



Subject:	Employability and Skills – update and workplan
Date:	6 April 2022
Reporting Officer:	John Greer, Director of Economic Development
Contact Officer:	Sinéad O'Regan, Employability & Skills Manager

Restricted Reports	
Is this report restricted?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If Yes, when will the report become unrestricted?	
After Committee Decision	<input type="checkbox"/>
After Council Decision	<input type="checkbox"/>
Some time in the future	<input type="checkbox"/>
Never	<input type="checkbox"/>

Call-in	
Is the decision eligible for Call-in?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

1.0	Purpose of Report or Summary of Main Issues
1.1	The purpose of this report is to advise members of a range of activity undertaken in 2021/22 to support skills development, economic engagement and job outcomes for key target groups and to set out the proposed workplan for the 2022/23 financial year.
1.2	The work programme supports the inclusive growth ambitions of the Council by targeting interventions on key cohorts, including:

	<ul style="list-style-type: none"> • Residents out of work and experiencing barriers to employment/self-employment, including those who are long-term unemployed and economically inactive • Residents with low skills levels • Young people who do not have a baseline Level 2 equivalent qualification and/or at risk of dropping out of (or not in) education, employment or training • In work, low earning residents • Those living in areas of highest multiple deprivation.
2.0	Recommendations
2.1	<p>The Committee is asked to:</p> <ul style="list-style-type: none"> • Note the work undertaken in the financial year to date and the positive employability and jobs outcomes associated with the work • Approve the priority interventions for the 2022/2023 financial year.
3.0	Main Report
3.1	<p><u>Labour market context</u></p> <p>As we have emerged from a series of lockdowns and restrictions throughout 2020 and 2021, there is significant volatility within the labour market – albeit that furlough has, to some extent, protected against the predicted jump in unemployment. Demand is hugely outstripping supply in a number of sectors (tech and digital, logistics and health and social care) while others (hospitality in particular) have shed significant roles and are now trying to rebuild – but are finding that many staff have taken the opportunity to retrain or move into a new area of work. This has created a new dynamic among both employers and job seekers, with increased demand and appetite for new inclusive pathways, particularly in strong growth sectors.</p>
3.2	<p><u>Employment Academies</u></p> <p>One of our key instruments for delivering on the council's ambitions in this space is the suite of Employment Academies that we deliver. These interventions are designed in conjunction with employers to address existing job vacancies or emerging openings. This work has meant that, since April 2021, we have been able to bring 816 people on to our Employment Academies (with an into-work rate of 75% for those successfully completing) both through utilising our own resources and through additional capacity created through the Labour Market Partnership. This level of demand – both from employers as well as those looking for a job or a better job – represents a significant increase on figures from previous years. By way of example, in 2019/20, we supported around 550 people through Employment Academies. A number of recent changes including an expansion of the Employability and Skills team and</p>

	the introduction of a new, more flexible commissioning framework, means that we have been much better placed to respond to opportunities, meeting employer demand and bringing forward solutions that benefit local businesses and residents.																																		
3.3	Of the 816 people who participated on an Employment Academy since April 2021, 454 people have successfully completed and 342 have secured employment so far, representing an into-work rate of 75%. Of the 307 people still going through a programme, 110 are already in work and are receiving support, qualifications or licences needed to access a better job. These include Level 3-5 qualifications (e.g. in childcare sector, allowing staff to move to supervisory and management roles) and lorry vehicle licences for Council staff to progress to better-paid driving roles.																																		
3.4	In terms of volume, the LMP Action Plan provided capacity for an additional 330 places on Employment Academies for 2021/22 which substantially increased the number of people we could support. The most popular Employment Academies are within logistics, leisure, construction and social care sectors, although childcare and playwork feature strongly, particularly for those wanting a better job. New Employment Academies have also been created for sectors such as utilities – with higher paid jobs – for example in fibre optics and streetworks. Average starting salaries in these sectors are in excess of £30,000 per annum.																																		
	<table border="1"> <thead> <tr> <th>Employment Academy 2021/22</th><th>No. participants</th></tr> </thead> <tbody> <tr><td>Logistics (Haulage)</td><td>179</td></tr> <tr><td>Construction</td><td>115</td></tr> <tr><td>Social Care</td><td>101</td></tr> <tr><td>Leisure</td><td>88</td></tr> <tr><td>Childcare/Playwork Upskilling: Level 3 & Level 5</td><td>72</td></tr> <tr><td>Fibre Splicing</td><td>45</td></tr> <tr><td>Bus Driving</td><td>36</td></tr> <tr><td>Business</td><td>32</td></tr> <tr><td>Customer Service</td><td>31</td></tr> <tr><td>Childcare/Playwork</td><td>29</td></tr> <tr><td>Taxi Driving</td><td>27</td></tr> <tr><td>BCC Transport Upskilling</td><td>20</td></tr> <tr><td>Health & Social Care Upskilling: Level 3 & Level 5</td><td>18</td></tr> <tr><td>Plant Operator/Streetworks</td><td>15</td></tr> <tr><td>Driving Instructor</td><td>8</td></tr> <tr><td>TOTALS</td><td>816</td></tr> </tbody> </table>	Employment Academy 2021/22	No. participants	Logistics (Haulage)	179	Construction	115	Social Care	101	Leisure	88	Childcare/Playwork Upskilling: Level 3 & Level 5	72	Fibre Splicing	45	Bus Driving	36	Business	32	Customer Service	31	Childcare/Playwork	29	Taxi Driving	27	BCC Transport Upskilling	20	Health & Social Care Upskilling: Level 3 & Level 5	18	Plant Operator/Streetworks	15	Driving Instructor	8	TOTALS	816
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3.5	<p>While LMP provided capacity for an additional 330 participants in 2021/22, this will reduce to 100 additional places in 2022/23 as the LMP begins to implement other interventions outlined in this report such as the Gateway service and Bridges to Progression for Young People. Across 2022/23 we expect that the Employment Academies will engage around 540 participants with at least 70% expected to gain employment/self-employment in sectors such as:</p> <ul style="list-style-type: none"> • Construction, manufacturing and utilities: fibre, street works, plant operator, welding etc. • Professional services such as administration, business and digital • Care sectors including health and social care, childcare and playwork • Customer service sectors such as leisure.
3.6	<p>We will also continue to work with public sector bodies such as the council, NIHE, Education Authority, Translink and Belfast HSC Trust to design and deliver Employment Academies for identified jobs. For example, in April 2022, we will be delivering Belfast City Council Employment Academies for 25% ringfenced OSS vacancies for those who are long-term unemployed through a General Operative Employment Academy – which will have 16 places for 9 ringfenced posts - and will be delivering a further Upskilling Academy for 20 Council staff to gain a better job through gaining a lorry licence.</p>
3.7	<p>Officers will also build on the significant development work underway to scope out new interventions that can contribute to the inclusive growth commitments. One key area of work at present is focusing on creating new pathways into the tech and digital sectors. While this sector has remained largely resilient throughout the pandemic, our research shows that there are limited pathways into the sector for those that do not have a degree. This challenge was identified through the work of the Innovation and Inclusive Growth Commission and the relevant government departments have committed to work with the council and with employers in the city to explore potential solutions. Work is about to get under way with two major employers on a pilot programme and, if successful we will seek to expand this in the coming year, bringing on additional employers and expanding the job roles. In expanding this activity, we propose to work with the Learning and Work Institute through their New Futures programme. This intervention focuses on those who need to or wish to re-skill as a result of their employment experiences during the pandemic.</p>
3.8	<p>Skills pathways are also being delivered for emerging sectors, including the green tech sector. Work is now underway – resourced through the LMP and the Community Renewal Fund – to</p>

	<p>deliver retrofitting qualifications for 150 people from Level 2 up to Level 5. This presents significant reskilling opportunities for companies in the housing and construction sectors, helping them to future-proof their business and look towards new opportunities for future growth.</p>
3.9	<p><u>Youth Initiatives</u></p> <p>While a significant proportion of the work that we have been engaged in to date has focused on those already in the labour market or trying to find a job or move to a better job, we have a number of interventions in place for young people, both in the formal education setting and outside of the school environment. These focus on improving educational attainment and helping young people at risk to find positive employment and training outcomes.</p>
3.10	<p>Our GCSE support programme was significantly disrupted over the last two years given the challenges faced by schools during the pandemic. However delivery within the current academic year has been back to expected engagement and participation rates, with learning workshops/classes and revision support being delivered in both school-based and community-based settings. Since September 2021, 362 young people have engaged on the programme. These young people have been identified as being unlikely to achieve at least Grade C in English and Maths GCSE, with the objective of helping them achieve a pass. In 2022/23 academic year, this programme is expected to ensure that 365 young people have access to the learning and revision support on offer.</p>
3.11	<p>We are also supporting 166 young people who either already have or are at risk of dropping out of the education system, employment or training through our Youth Support Programme which exceeds the annual target of 160. Officers have ensured that this programme operates in tandem with the Education Welfare Service which are the primary referral source for the Youth Support Programme. Of those young people who complete the Youth Support Programme in 2021, 55% have progressed into positive outcomes such as employment and further education/training. In 2022/23 academic year, this programme is expected to ensure that a further 160 young people are supported to either stay in or re-engage with formal education – have access to the wrap-around supports on offer.</p>
3.12	<p>Officers are also currently designing a new approach to improving the employability and programme-readiness of young people, based on the Boston Summer Scheme model and implemented in pilot form in summer 2022. While co-designed with youth training providers</p>

	<p>in the city, this is designed to sit within the wider 'Bridges to Progression' offer within the LMP outlined below and will:</p> <ul style="list-style-type: none"> • Target young people 16-17 years old who have disengaged from or have not engaged on youth training – TfS/Skills for Life & Work, with initial referral from providers. • Provide intensive personal support – wrapped around individual need/circumstances (from housing to counselling to training). • Incorporate employability skills – self-esteem, team building, communication skills, self-efficacy. • Offer paid work experience with options being scoped include 'taster' work placements leading to an 'anchor' placement over the summer months as well as vocational skills development as needed.
3.13	<p>A dynamic policy environment in this space – in particular, taking account of the Fair Start initiative – will lead to us re-visiting our work in the field, in conjunction with our partners in the community and voluntary sector as well as local schools, Department for Education and the Education Authority.</p>
3.14	<p><u>Labour Market Partnership</u></p> <p>Members have recently received a number of reports on Employability NI and the emerging work of the Belfast Labour Market Partnership. At the August 2021 meeting of this committee, it was noted that the LMP action plan would be submitted to DfC in the coming months. Since that time, the letter of offer has been received and work is under way on delivery of priority interventions. The action plan is for an initial period of 18 months from September 2021 until March 2023 with a subsequent 3-year action plan to be submitted for the period from April 2023 onwards. Priority areas of focus are:</p> <ul style="list-style-type: none"> • Quickly back to work: Ensuring a co-ordinated response to the substantial number of people in the city who have been or are risk of being made unemployed, especially as a consequence of the COVID-19 pandemic, focusing on helping people to move quickly back into employment and/or training (with a view to future employment) • Increasing Opportunities: Empowering those furthest from the labour market to succeed through quality support, especially those who will be considered long-term unemployed as a consequence of COVID-19, as well as the economically inactive • No-one Left Behind: Targeting of those disadvantaged groups through the delivery of an integrated, comprehensive, inclusive, holistic and local employability approach; and

3.15	<ul style="list-style-type: none"> • Catching Up: Supporting access to careers pathways, re-skilling and upskilling for those unemployed as well as those on low incomes. <p>Resources from the Labour Market Partnership enabled the council to significantly increase the volume of activity (and consequently job outcomes). The Partnership has also created a platform for engagement with government departments as a means of refocusing regional programmes more effectively within the Belfast area. The LMP action plan recognises that, while there are definite gaps that have been identified that will necessitate the creation of new interventions, not all activity need be new ‘provision’ or ‘programmes’; sometimes it is equally important to profile and/or promote existing interventions. The headline programme of work within the action plan includes the following:</p> <ul style="list-style-type: none"> • Gateway Service: a key issue that emerged in our engagement with the LMP partners was the need for independent advice and guidance outside of mainstream JBO support for those who are out of work and non-job ready such as long-term unemployed and the economically inactive. In our engagement with LMP members, they considered that these groups required enhanced support to navigate the existing provision and identify the right support, at the right time, to help move them towards positive job, skills and qualification outcomes. It is proposed that the Gateway will support 1,000 people in the coming year. Participants will engage on a voluntary basis and the delivery model is being co-designed with key stakeholders such as the JBO Network, Careers Service, VCSE sector etc. with a view to procuring the service following intensive pre-market engagement in early 2022/23 • Labour Market Observatory: officers are currently working with both UU and QUB as well as key stakeholders such as the Institute of Public Policy Observatory, to establish a LM Observatory that will provide the intelligence, data and evidence-base needed to underpin decision-making in the city and takes account of demand, supply, provision and policy • Digital Badges project: the number of people in Belfast with no or low formally-recognised skills is significantly above the NI and UK average. Officers have been working with the RSA to explore how a Digital Badges scheme could help recognise the non-accredited skills of these individuals. The project also looks at supporting employers to think about how some current practices are limiting their access to a broader talent pool by excluding those that may not have the formal qualifications but
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3.16	<p>that have aptitudes and strengths that could make a valuable contribution to the workforce. The RSA Belfast pilot will start by focusing on our Employment Academies in logistics, social care and childcare and then moving to other sectors. These badges will be used to recognise and validate the work undertaken through our programmes as an alternative to the standard practice of asking for qualifications/experience</p> <ul style="list-style-type: none"> • Bridges to Progression: over the coming years, the training environment for level 1 and level 2 skills is changing. At present, up to 1,000 young people in Belfast are entering these training interventions but employability outcomes are variable across sectors and in different parts of the city. We are currently working with existing providers to look at how the positive outcomes for these young people can be enhanced, through additional support and more structured exposure to the world of work – particularly in new growth sectors and utilising delivery models such as the Boston Summer Scheme as outline above. • Scoping place-based and people-based targeted interventions: the strategic assessment identified a number of key groups that were under-represented in the labour market or that faced significant barriers to finding work. These groups include (among others) those with a disability, justice system leavers, older people, lone parents, those living with health issues (including mental health), ethnic minorities. Likewise, the research identified that there are specific parts of the city where levels of LTU and economic inactivity are more than twice the city average. Government programmes over many years have tried different approaches to support these groups. We propose to explore some new models that are either target group-based and/or location-based in order to support incremental improvements in employment outcomes among the target populations. <p><u>European Social Fund (ESF) Match Funding</u></p> <p>Members will be aware that, at the October 2021 meeting of this committee, it was agreed that match funding totalling £240,000 would be allocated to four ESF projects. These are:</p> <ul style="list-style-type: none"> • Belfast Works project – city-wide project led by Upper Springfield Development Trust • Path to Employment – delivered by Workforce • Get Connected project – delivered by Workforce • Jobmatch – delivered by Springboard Opportunities.
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3.17	<p>While there has been a high level of uncertainty with regards to match funding providing by the Department for the Economy (DfE), officers note that this department has now allocated 90% of the requested match funding for ESF projects, with the intention of releasing the remaining 10% within the 2022/23 financial year. This decision will not affect the outcomes originally set out in the match funding requests to Belfast City Council given that projects have committed to self match funding if required, should the additional 10% not be allocated.</p>
3.18	<p><u>Policy influence and guidance</u></p> <p>In addition to direct delivery, officers will also continue to work with internal and external partners to use all tools at our disposal to address the key employability and skills challenges and to lever resources to support additional delivery, focusing on the council's inclusive growth ambitions. There are a number of key mechanisms through which this can be achieved:</p> <ul style="list-style-type: none"> • Developer Contributions: on a practical level, officers are supporting the Planning team in the development of the Developer Contributions Framework and are actively engaged with a number of emerging development schemes to ensure that relevant employability and skills interventions are incorporated and that compliance is ensured. Additional detail on the framework will be presented to relevant committees in the coming period • Social Value Procurement Policy: pending council agreement on the final version of the policy, officers are working closely with Corporate Procurement Services to support the implementation, focusing on the employability and skills measures.
3.19	<p><u>Finance and Resource Implications</u></p> <p>The activities outlined in this report will be resourced from the 2022/23 budget for the Employability & Skills section of the Place and Economy departmental budget that was included as part of the estimates that were approved by this Committee on 12 January 2022.</p>
3.20	<p><u>Equality or Good Relations Implications/Rural Needs Assessment</u></p> <p>Each of the proposed projects referenced in this report is informed by statistical research, stakeholder engagement and complementary policies and strategies. New projects or service areas are equality screened and a rural needs assessment completed. Considerations given to equality and good relation impacts at the initial stages of project development. Officers will work closely with the Equality and Good Relations Team on this activity. A new CRM system has been established to enable officers to regularly review participant engagement and address any equality or good relations issues arising.</p>

4.0	Appendices – Documents attached
	None



Subject:	Supporting Business Start Up and Growth in Belfast
Date:	6 April 2022
Reporting Officer:	John Greer, Director of Economic Development
Contact Officer:	Cathy Keenan, Enterprise and Business Growth Manager

Restricted Reports

Is this report restricted?

Yes

☐

No

☒

If Yes, when will the report become unrestricted?

After Committee Decision

After Council Decision

Some time in the future

Never

☐
☐
☐
☐

Call-in

Is the decision eligible for Call-in?

Yes

☒

No

☐

1.0	Purpose of Report or Summary of main Issues
1.1	The purpose of this report is to provide members with an update on activity in 2021/2022 to support the development of new and existing businesses across the city through the Enterprise and Business Growth team. The report sets out key priority areas of work for the 2022/23 financial year, seeking approval for new areas of activity to support delivery of the targets under the Growing the Economy pillar of the Belfast Agenda. It also includes an update on progress to develop a new Economic Strategy for Belfast.
2.0	Recommendations
2.1	The Committee is asked to:

	<ul style="list-style-type: none"> • Note the Council's performance and contribution to delivering against Belfast Agenda ambitions to grow the Belfast economy, focusing on the current support for Business Start-up and Growth • Note the ongoing work on the Belfast Economic Strategy and agree to receive future updates on this work in the new electoral term • Note and agree the priority work areas for the 2022/23 financial year • Agree attendance by the Lord Mayor, Chief Executive and Director of Economic Development or nominees at the New York New Belfast Conference in June 2022 and approve the associated budget allocation of £6,000 from existing resources.
3.0	Main report
3.1	At the meeting of the City Growth and Regeneration Committee on 12 May 2021, members approved a programme of targeted support for new and existing businesses in Belfast, to be delivered by the Council's Enterprise and Business Growth team. This work focuses on the statutory responsibilities that the council has around business start-up and entrepreneurship for key groups as well as social enterprise support. This is part of a much wider programme of activity that a number of teams across the council are engaged in to support businesses in the city.
3.2	<p><u>Overview of 2021/22 activity</u></p> <p>The activity undertaken is developed in partnership with a range of organisations including Invest NI, Catalyst and Local Enterprise Agencies. Match funding to support delivery is secured through a series of letters of offer which contain contractual commitments in terms of businesses engaged, business improvements supported and jobs created. A detailed overview of performance is set out in Appendix 1 but highlights include:</p> <ul style="list-style-type: none"> • Enterprise awareness activity: engaged 760 individuals through a range of activities. Some specialist support work undertaken with female entrepreneurs and student start-ups • Start a business activity: 279 new jobs created through the Go for It support, with 75 businesses receiving additional follow-on mentoring and financial support • Support for Social Enterprise and Co-operatives: 56 organisations were supported with one-to-one mentoring, advice and guidance, including six new co-operatives. We have recently applied to Social Enterprise NI to be recognised as the region's first "Social Enterprise Place"

3.3	<ul style="list-style-type: none"> • Business growth supports: 327 businesses engaged in a range of business support workshops and 357 have been supported through one-to-one engagement to help them to implement growth strategies and become more resilient • Innovation Factory: now at 70% occupancy, the operator has ambitious plans to increase those numbers in 2022/23. The centre has seen a high level of interest from new firms in sectors including TV/film, digital, engineering and green tech. Over the year, 84 businesses engaged in masterclasses at the centre. As part of their social and economic regeneration activity, over 30 work placements have been facilitated by IF customers over recent months, a series of school engagement activities have taken place and 10 local people have been trained as Digital Champions • Scaling and growth: in partnership with Catalyst and Invest NI, the Way to Scale programme supported 60 individuals to participate on a series of bootcamps to transform their businesses and support them to scale and grow to turnover of more than £3million. 10 were supported to participate in a one week residential at MIT and access a peer-to-peer workshop series with Catalyst and a Go to Market residential in Boston which focuses on go to market strategies and tactics • City Vibrancy: In January 2002, we launched the Vibrant Business Destinations programme in partnership with DfC. To date, there have been 17 enquiries in relation to the programme and officers are engaging with businesses to support them with the expression of interest process. We also continue to support City Regeneration and Development colleagues to develop and deliver the Vacant to Vibrant programme • We have invested in new technology solutions to enable us to track the impact of our investment and carry out regular evaluations of our programmes in order to measure their effectiveness. We have also re-launched a bi-annual Belfast Business Survey in conjunction with Belfast Chamber. We are currently analysing responses from over 400 businesses and these insights will be shared with our partners to build a collective understanding of the needs of businesses in the city and agree on priority interventions to address these needs. <p>The coming financial year is a year of both opportunity and challenge and this will shape the programme of work to be carried out. Opportunities such as Belfast Region City Deal investment, the development of Innovation City Belfast and the outworking of the Innovation and Inclusive Growth Commission provide critical context pieces for the work. However, the economic analysis indicates that, while the impact of COVID-19 may not have been as</p>
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	<p>significant as originally anticipated, the wider cost of living rises and associated implications for businesses will impact on their profitability and may constrain investment. This year will also see the conclusion of some of our most significant business support interventions funded through these mechanisms with limited clarity on the new funding instruments such as Shared Prosperity Fund.</p>
3.4	<p><u>Belfast Economic Strategy</u></p> <p>Recognising the opportunities and challenges identified above, work is currently underway to develop an Economic Strategy to support sustainable and inclusive growth in Belfast for the period 2022-2030. The strategy will clearly articulate the role of Belfast in the regional economy and will identify a series of key propositions to build on areas of competitive advantage in a rapidly changing global business context while ensuring that structural challenges are addressed and environmental issues considered, in order to drive sustainable and inclusive growth. It will align with the ambitions set out in the 10x Economic Vision and, like 10x, it will focus on how we can maximise the return on our investments to secure transformational change that can benefit all residents.</p>
3.5	<p>The timeline for the strategy will be to the period to 2030. However, given the volatility of the current economic environment, it will include short/medium and longer-term priorities for action and associated resource requirements. The strategy is being led by a project steering group of council representatives who are working to ensure the strategy takes account of the council's wider priorities. Additional engagement will take place with elected members in the new term.</p>
3.6	<p>While the strategy will be led by Belfast City Council, the engagement of and alignment with the work of key partners across the public, private and third sectors will be central to its effectiveness. This partnership approach is a key feature of the strategy development process and will be reflected in the propositions for action, given the disparate range of responsibilities across a large number of organisations. To that end, we have been engaging with the Community Planning team to explore how the engagement work undertaken can feed into the ongoing development work on the Belfast Agenda refresh. It is expected that the vision and objectives developed through the strategy work will be used as the basis of the Sustainable and Inclusive Economic Growth Pillar of the Belfast Agenda Refresh. Following the development of the strategy, a series of work will be undertaken to re-focus areas of work aligned with the key priority actions identified. This will further inform the work of the Enterprise and Business Growth Unit.</p>

3.7	<p><u>Overview of proposed activity for 2022/23</u></p> <p>While we will continue to deliver on commitments regarding start-up and growth as set out in our various funding agreements with partners, there are a number of new areas of programme development and delivery that will focus our work for the coming year. These include:</p> <ul style="list-style-type: none"> • Starting a Business: Working with the other councils across the region, Invest NI and DfE we aim to bring forward plans to revamp the approach to business start-up post-2023. We have recently concluded an outline business case which presents future options to enhance the offer in line with our ambitions as set out in the Belfast Agenda. Based on the findings to date, a significant programme of work will be required to seek the additional financial resources required to deliver this new programme of activity and to ensure it is in place for the conclusion of existing supports in April 2023. A report with further detail on this proposed approach as well as the financial and operational implications will be presented at a future meeting of this committee • Social Enterprise and Co-operative Development: In 2022/23, we will refresh our social economy action plan based on ongoing research that has been taking place with the sector. Across the year, we will enhance the programme of financial incentives for the sector and increase the levels of community outreach. A report with further detail on these proposals will be presented to the committee at a future date • Growing a Business: Responding to both the opportunities and challenges generated as a result of climate change, we will engage closely with the Climate and Waste teams to identify opportunities to help businesses to become more environmentally sustainable. Based on the recommendations of the new Music Strategy, we will also be working in partnership with the Tourism and Culture teams to develop interventions to support new and existing businesses within our thriving music sector • Support to Scale and Grow: Working with the City Innovation team, we are piloting interventions to access future opportunities through Challenge Funds, particularly for those businesses in growth sectors. We will also continue to work in partnership with Catalyst Inc and Invest NI to build on previous activity to enable businesses to scale and grow to a turnover of more than £3million. We are currently re-scoping this activity aligned with the ambitions of Innovation City Belfast • Investing in Belfast: This year, we will focus on refreshing our City Investment Service to ensure that it provides the right support to new and potential investors in the city and complements the work of partners such as Innovation City Belfast. We will also
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	<p>work to build on our partnerships in London and Dublin to identify new opportunities to profile the city for investment and will explore opportunities for strategic city partnerships aligned to our growth sectors. We will also support a range of sector development initiatives to build clusters based on our existing strengths in areas such as Fintech, Regtech and MedTech. We will continue to work with our seven partner councils along the Dublin-Belfast Economic Corridor to identify business and new collaborative opportunities. 2022 will see the conclusion of the development plan, strategy and action plan for the partnership which will set out the long-term plans to deliver economic prosperity across the region. A total of £15,000 is required to support the development of the partnership in the 22/23 financial year. This budget will be held by Newry Mourne and Down District Council and allocated to partnership activities. We will also fund a range of events to promote these areas of work, based on a series of criteria to demonstrate alignment with agreed priorities. We will establish an independent panel to assess these relevant applications, with a maximum financial allocation of £10,000 to relevant events.</p>
3.8	<p><u>Attendance at New York New Belfast event</u></p> <p>The New York New Belfast (NYNB) conference has taken place in New York in June each year over the last decade. The event showcases the best of Belfast business, education, tourism, and cultural offer to a wide audience of NYC and US influencers and decision makers. This year's event will take place on 23 and 24 June 2022. It will focus solely on a Business and Investment theme profiling, in particular, Belfast's capacity and potential in the field of FinTech.</p>
3.9	<p>It is expected that the event will attract up to 150 US-based delegates. The opening event will be hosted by Mayor of NYC Eric Adams or Governor Kathy Hochul and an invitation has been received for the Belfast Lord Mayor to co-host this. In addition, there will be a series of presentations from Belfast and NYC-based business organisations and a number of side meetings with relevant political and business representatives.</p>
3.10	<p>Given the significant process in the city since the last New York New Belfast in-person event, it is proposed that the council agrees to attendance by a number of representatives to articulate the focused investment narrative, including City Deal, Belfast Innovation District and the 10x commitments at regional government level. The Committee is asked to agree to the attendance of the Lord Mayor, Chief Executive and Director of Economic Development</p>

	or nominees. The cost of travel and accommodation is estimated to be £6,000. The budget for this visit is covered as part of the annual budget for International Relations activities.
3.11	<p><u>Financial & Resource Implications</u></p> <p>The Enterprise and Business Growth activities outlined within this report will be resourced through the existing Enterprise and Business Growth budget for 2022/23. This was included as part of the estimates that were approved by this Committee on 12 January 2022 and totals £1 261, 353.</p>
3.12	The costs associated with attendance at NYNB will be resourced as part of the annual budget for International Relations. This was included as part of the estimates that were approved by this Committee on 12 January 2022.
3.13	<p><u>Equality or Good Relations Implications/Rural Needs Assessment</u></p> <p>The unit is currently undertaking a process of equality screening on the overall work programme. This will ensure consideration is given to equality and good relation impacts throughout the delivery of this project.</p>
4.0	Appendices – Documents attached
	Appendix 1: Detail on 2021/22 Enterprise and Business Growth activity

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Appendix 1: Detail on 2021/22 Enterprise and Business Growth activity

Enterprise awareness activity

- Engaged 760 individuals through awareness supporting them to progress to start a business
- We continue to extend our reach to engage those individuals who are underrepresented in terms of entrepreneurship, providing them with support to overcome barriers to take positive steps to starting a business. For example, we engaged with 143 females providing them with mentoring and access to networks in partnership with Women in Business, we supported 40 individuals who were economically inactive and 50 students and graduates accessed support, 15 are currently accessing salary support through Invest NI Student to First Sale.

Start a Business

- 656 individuals engaged in business start-up activity, 454 of those developed a business plan through the Go For It programme, supporting the creation of 279 jobs
- We provided additional support to 75 individuals through 1-1 mentoring and access to incentives of £1,500 to help kick start their business
- We also enabled test trading opportunities for 49 new businesses through our dedicated start up space at St George's Market

Support for Social Enterprises and Co-operatives

- 56 organisations were supported with one-to-one mentoring, advice and guidance. Six of these organisations were new co-operatives
- We have undertaken targeted engagement work to increase the level of interest in developing co-operatives. We organised 6 events, attracting 129 attendees across 21-22 year. We facilitated 4 regional networking events as well as a global best practice visit
- The Social Economy Incentive Fund launched October 2021 with both rounds of this now completed. We received 45 applications, shortlisted 21 to pitch and chose 11 winners to receive a share of £60,000, two of which received £10,000
- We provided opportunities for 13 social enterprises to test trade at the social economy mini markets hosted at St George's Market
- We have been developing our outreach and engagement to increase awareness of the sector and delivered two pilot projects for youth to explore social economy: one project is delivered through schools and one through community groups. The school's youth pilot began in December 2021 with 4 schools recruited city wide attracting 59 students in total

and the community pilot began in March 2022 with 5 community groups recruited (North/East/West)

- An application has also been submitted to SENI to become the first Northern Ireland Social Enterprise Place, pending decision.

Growing a Business

- Through our business growth support, we have worked with 327 businesses through one-to-many workshops and 357 have been supported through one-to-one engagement to help them to implement growth strategies and become more resilient. The type of support offered includes enhancing their digital and online presence, improving tendering skills and specialist support for businesses with high growth potential
- A further 40 businesses were provided with specialist support to help navigate new processes and administration requirements and address the ongoing challenges presented through EU exit
- We launched the Digital Surge programme in February in partnership with the 10 other councils. This aims to support over 1000 businesses across Northern Ireland to improve their digital capacity. 198 businesses across the region will access support through a range of specialist workshops, events, mentoring and aftercare over the period of the programme (18 in the Belfast City Council area)
- City Vibrancy: In January we launched the Vibrant Business Destinations programme in partnership with DfC which aims to support local business associations to develop and deliver interventions that will drive footfall and create vibrancy in areas outside of the city centre. To date there have been 17 enquiries in relation to the programme and officers are engaging with businesses to support them with the expression of interest process, this scheme will be in place to October 2023. We also continue to support the City Regeneration and Development Team to develop and deliver the Vacant to Vibrant programme ensuring businesses have access to support to enable them to apply for the scheme
- Innovation Factory: now at 70% occupancy, the operator has ambitious plans to increase those numbers in 2022/23. The centre has seen a high level of interest from new firms in sectors including TV/film, digital, engineering and green tech. Over the year 84 businesses engaged in masterclasses and events at the centre. As part of their social and economic regeneration activity, 30 work placements have been facilitated by IF customers over recent months, and a series of school engagement activities have been facilitated
- Scaling and growth: in partnership with Catalyst and Invest NI, the Way to Scale programme supported 60 individuals to participate on a series of bootcamps to transform

their businesses and support them to scale and grow to turnover of more than £3million. 10 were supported to participate in a one week residential at MIT and access a peer-to-peer workshop series with Catalyst and a Go to Market residential in Boston which focuses on go to market strategies and tactics

- We also supported the development of key growth sectors through engagement on partnership project with the Innovation team, these included HUB-IN and XPAND which aim to develop local hubs of innovation and identify opportunities for local SMEs to address key city challenges through the distribution of Challenge Funds
- In partnership with the Tourism, Culture and Arts Unit we supported the development of our UNESCO City of Music bid and wider music strategy for the City. With the successful bid announcement and draft music strategy complete, we further supported our City of Music ambitions, through our activity under Output Belfast. In 2021/22 “Output Belfast” activity included a number of key projects including a range of events and a series of panels looking at music and new technologies, and music and business showcases, providing artists and businesses the opportunity to showcase their work to the international business community.
- The Belfast Business Survey was launched in Summer 2021. This research assesses trading conditions, outlook and current challenges facing businesses based in the city. This year we have received nearly 400 responses to each survey wave to date. The findings have been integral to informing and shaping the unit’s programme of work.

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Subject:	PwC Good Growth for Cities 2022 Report: Taking Action on Levelling Up
Date:	6 April 2022
Reporting Officer:	Cathy Reynolds, Director of City Regeneration and Development
Contact Officer:	Marie Miller, Marketing Manager, City Regeneration & Development

Restricted Reports	
Is this report restricted? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> 	
If Yes, when will the report become unrestricted?	
After Committee Decision After Council Decision Some time in the future Never	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Call-in	
Is the decision eligible for Call-in? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> 	
1.0	Purpose of Report or Summary of main Issues
1.1	The purpose of this report is to: <ul style="list-style-type: none"> Update Members on PwC's Good Growth for Cities 2022 report: Taking Action on Levelling Up
2.0	Recommendations
2.1	The Committee is asked to: <p style="margin-left: 40px;">Note the update on - PwC's Good Growth for Cities 2022: Taking Action on Levelling Up report which measures the performance of cities and regions across the UK as indicators of 'Good Growth' and ranked Belfast as the highest-ranking city from the devolved nation.</p>
3.0	Main Report
3.1	Background <p>The Demos-PwC Good Growth for Cities Index is an annual report which looks at broad measures of economic performance alongside well-being indicators to develop a metric</p>

	<p>for ‘Good Growth’ of cities. Specifically, the report ranks 50 of the UK’s largest cities based on people’s assessment of 12 key economic wellbeing factors, including jobs, health, income and skills, as well as work-life balance, house affordability, travel-to-work times, income equality, environment and business start-ups. This year’s report also includes two new indicators covering safety and vibrancy of local high streets. Indicators within the report align to the Council’s strategic objectives and of this Committee, as set out within the CG&R Committee Plan, the Belfast Agenda, Corporate Plan, BRCD. Belfast City Centre and Regeneration Strategy (BCCRIS), Bolder Vision for Belfast and the Reset for Growth report, as well as a number of other strategies and programmes.</p>
3.2	<p>Using these ‘Good Growth’ indicators, the report ranked Belfast in eighth place, and highest ranked city from the devolved nations. Other cities in the top 10 include London, Manchester, Birmingham, Glasgow, Newcastle, Liverpool, Leicester, Sheffield and Bristol. Members will be aware of the projects and programmes Council are delivering aimed at job creation, regeneration and place making, vibrancy and making Belfast a city a great place to live, work, visit and invest. The recent findings from this report are a positive sense check in terms of our direction and focused priorities, and also highlighting the need to ensure that we continue to work to position the city to compete both nationally and globally.</p>
3.3	<p>Contained within the report are case studies of best practice at how investment in townscapes, support in community cohesion, efforts to foster local pride and attract new types of businesses are being used to boost growth. Belfast was selected as a case study for inclusion within the report, referencing a balanced and deliberately interventionist approach to regeneration. Work being undertaken by the city to invest in place-making, open and green spaces, community infrastructure, connectivity and cultural and tourism offerings in order to create a more attractive, accessible, and vibrant city centre which connects to surrounding communities are highlighted as best practice. It also referred to city investment plans including a citywide commitment to investing in neighbourhoods, leisure and community facilities and to strategies that integrate physical regeneration with cultural, social and environmental regeneration. It highlighted the Bolder Vision for Belfast as being key to a stronger and more resilient city core and acting as a call to action for the council, civic partners, local businesses and the wider local community. It also highlighted how Belfast is working to establish itself as a cultural centre in order to realise it’s global cultural and economic ambitions, referencing the 10-year cultural programme, UNESCO City of Music and the Belfast</p>

	<p>Stories development plans. The city's innovation and inclusive economic growth plans, supported by the BRCD investment and Belfast's position as the number one city for FinTech investments were referenced and that further investment in digital connectivity and supporting centres of excellence would drive Belfast forward as a global digital and scientific centre and globally significant destination for innovation</p>
3.4	<p>While the report welcomes the Levelling Up White Paper, analysis within the report demonstrates that Government, public and private sectors need to continue to work collaboratively to address regional inequalities and capitalise on the once in a generation opportunity to create successful places and deliver good growth. Members will be aware that the Council is working collaboratively with public, private, community and key anchor institution partners across a number of partnerships including Innovation City Belfast, Dublin Belfast Economic Corridor, Belfast Region City Deal and the Climate Commission and to deliver strategic programmes of work including A Bolder Vision, a Future City Centre Programme and neighbourhood regeneration aimed at delivering our shared collective ambitions as outlined within the Belfast Agenda.</p>
3.5	<p>The report notes that in general cities which performed well in this year's index had strong local economies, and strong environmental and safety credentials. It also notes that the pandemic has caused a shift in public priorities, with people wanting to be more connected with their local communities and to live in greener, fairer places. Members will be aware of the effects of the pandemic in Belfast, and efforts by the Council to address the impact on our communities and businesses, including the delivery of the DfC Covid Recovery Revitalisation Programme and via Belfast: Our Recovery plan. The report has found that the shift in public priorities has also altered the growth prospects of cities and regions as people change how and where they want to work and live, with small and provincial cities benefitting more in the context of the levelling up agenda. This provides an opportunity for Belfast in terms of its desire to attract and retain residents in the city to deliver on our Belfast Agenda ambitions including to attract 66,000 new residents by 2035.</p>
3.6	<p>The report tracks regional and city recovery across different demographic and societal groups including young workers, ethnic groups, and women, however it does not publish the breakdown per city and region.</p>

3.7	<p>The report also proposed four key areas for cities and regions to consider as they develop Levelling Up plans and continue to address economic recovery. In order to secure a fairer economic recovery and build sustainable growth it highlights that local and central government and the private sector should focus on the following:</p> <ol style="list-style-type: none"> 1. Levelling up and the reality of regional inequality 2. Capitalising on growth outside the larger metropolitan cities 3. Driving social mobility and addressing intergenerational inequality 4. Green growth to provide the basis for all future action
3.8	<p>There are various actions that sit below these priority areas for central and local government and businesses relating to investment in relationships across the public, private and third sectors to develop place strategies for place based transformation; investment in high streets; sector focused employment investment; reskilling and apprenticeships; local economic strategies; housing education; improved transportation links; circular economy and green growth; net zero and sustainability.</p>
3.9	<p>These action areas align to Belfast's strategic ambitions as outlined in the Belfast Agenda, and propositions outlined within the Innovation & Growth Commission 'Reset for Growth' report aimed at amplifying the city and region's future success focused around priorities on being more globally relevant; immediate action on climate change and turning this into an economic opportunity; housing development; developing a stronger core city and delivery of a Bolder Vision and a focus on building world-renowned business clusters.</p>
3.10	<p><u>Financial & Resource Implications</u></p> <p>None associated with this report.</p>
3.11	<p><u>Equality or Good Relations Implications/ Rural Needs Assessment</u></p> <p>None associated with this report.</p>
4.0	<p>Appendices – Documents attached</p>
	<p>Appendix 1: Demos - PwC Good Growth for Cities 2022: Taking action on Levelling Up report</p>

Industry in Focus

Good Growth for Cities

Taking action on levelling up

#IndustryInFocus #GoodGrowth



Contents

Executive summary	4
Public priorities for growth	6
Work-life balance drives Good Growth	10
Small cities lead UK recovery	20
Agenda for action	34
Appendix	41
Contacts	45





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As we emerge from the pandemic, one of the country’s priorities must be the delivery of a fair recovery – one that benefits all people and places.

Though damaging in so many ways, the pandemic does appear to have driven a shift in public preferences, which now presents an opportunity. Building on the increased emphasis many people are placing on their communities and the environment, we now have the chance to reset and address some of the regional inequalities that have characterised our country for generations.

The recently published Levelling Up White Paper is a welcome start, but as the analysis in this year’s Good Growth for Cities report demonstrates, the Government, businesses and local leaders will need to work together if we are to capitalise on this once in a generation opportunity to create successful places right across the UK.”

Carl Sizer, Head of UK Regions, PwC

Executive summary

As the pandemic loosens its grip on the UK, we are beginning to understand how it has exacerbated already deep-rooted inequalities in our society. The more we understand what drives these inequalities, the better our prospects of securing a fair economic recovery for all.

For the last decade, our annual Demos-PwC Good Growth for Cities Index has measured the performance of cities and regions right across the country. The Index looks beyond performance against purely economic indicators, and focuses on additional measures of wellbeing, such as access to jobs, income, health, skills, work-life balance, housing, transport and the environment. In addition, and to reflect some of the more obvious issues highlighted by the pandemic, this year's Index includes two new indicators¹ covering safety and the vibrancy of local high streets.

As in previous years, we asked members of the public to provide their views on the measures they think matter most. This year, the results of our survey were stark. There has been a marked shift in public preferences, with greater weight being placed on issues such as work-life balance, income distribution and the environment.

Though it is possible we will see a shift back to a more predictable pattern of preferences in future years – one in which access to employment and skills re-emerge as the measures on which the public place the greatest importance – there is a clear emphasis being placed on the need to press for a fairer deal for all regarding income, protection of the environment and having the time to enjoy it safely. There would appear to be significant support for a nationwide programme to improve equality and level up.

While it is difficult to be precise about the extent to which the pandemic has driven these changes, it is reasonable to argue that the way we have all been living over the past two years, along with relatively strong confidence in the employment market, has caused a proportion of the population to reflect on the things they value. The data included in this report suggests this is having a significant impact on the relative fortunes of different places – the cities that perform well against this year's Index have strong local economies but are also characterised by strong environmental and safety credentials.

Our analysis also suggests some city dwellers have been moving to commuter belts or rural areas amid the growing focus on wellbeing, the environment and income distribution. In some cases, this is prompting a faster economic recovery in provincial cities. Based on total population count for each city, we estimate that many of the smaller cities in our analysis – such as Bournemouth, Exeter and Plymouth – will see stronger Gross Value Added (GVA) growth rates in 2021 and 2022 compared to the larger metropolitan cities.

Though the improved performance of some smaller and provincial cities is to be welcomed in the context of the levelling up agenda, it is also clear that the majority of places benefitting from the trends referenced above are in the South of the country. Many of the issues underpinning the relative underperformance of cities in the Midlands and the North have been exacerbated by the pandemic. Though the economies in some of these cities are in reasonably good shape, they have been unable, as yet, to capitalise on the changing nature of public preferences and may need further help or intervention to catch up with those moving more quickly.

Nevertheless, our analysis indicates there are numerous opportunities for cities and other areas to benefit from the changing nature of the way we live and bring greater precision to their plans to deliver Good Growth. This year, we interviewed several different local leaders at the heart of the place-shaping agenda, to explore how they plan to take action to drive economic growth in their areas. Included in the case studies throughout our report are examples of how investment in townscapes, support for community cohesion, efforts to foster local pride and attract new types of businesses are being used to boost growth in these places.

While the pandemic has exacerbated many of the more systemic challenges in our society, shifting public preferences, coupled with the political will to deliver levelling up signalled by the publication of the White Paper, present a window of opportunity to reset and deliver Good Growth across the UK. Achieving this will require imagination, bold action and collaboration by government, businesses, and local leaders. Only by working together will we secure Good Growth now and for the future.

1) For this reason, it is not legitimate to compare the relative performance of cities in this year's report with their performance in previous years.

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A widespread shift in public priorities has been triggered by the pandemic – people want to be more connected to their communities and to live in greener, fairer places. This shift has led to a change in how and where people live and work – altering the makeup of the UK economy, and the shape of growth prospects for every city and region across the nation.”



Public priorities for growth

Living through two years of a pandemic has challenged the work, home and social framework of people across the UK. It has prompted the public to reassess their lives, and adjust their priorities and ways of living accordingly. In recognition of this, we have taken the opportunity to re-engage with the public and refresh our research approach.

We published our first Good Growth for Cities Index with the think tank Demos a decade ago², measuring the performance and characteristics of cities and regions in a composite 'Good Growth' Index. The Index seeks to recognise that if growth is essentially about improving the prosperity, opportunities and wellbeing of the general public, the focus must go beyond traditional measures of economic success, such as GDP or GVA.

Our annual Index covers a list of broad measures of economic wellbeing – factors the public identifies as most important to their work and finances, and are therefore essential for judging economic success. This year, we worked with Demos to understand if these factors remain relevant – and to explore what else the public may now prioritise.

We found that all our original measures of economic success are still consistent with public views. But our research revealed that low crime rates, having a safe neighbourhood and a vibrant local high street are also core topics of public interest.

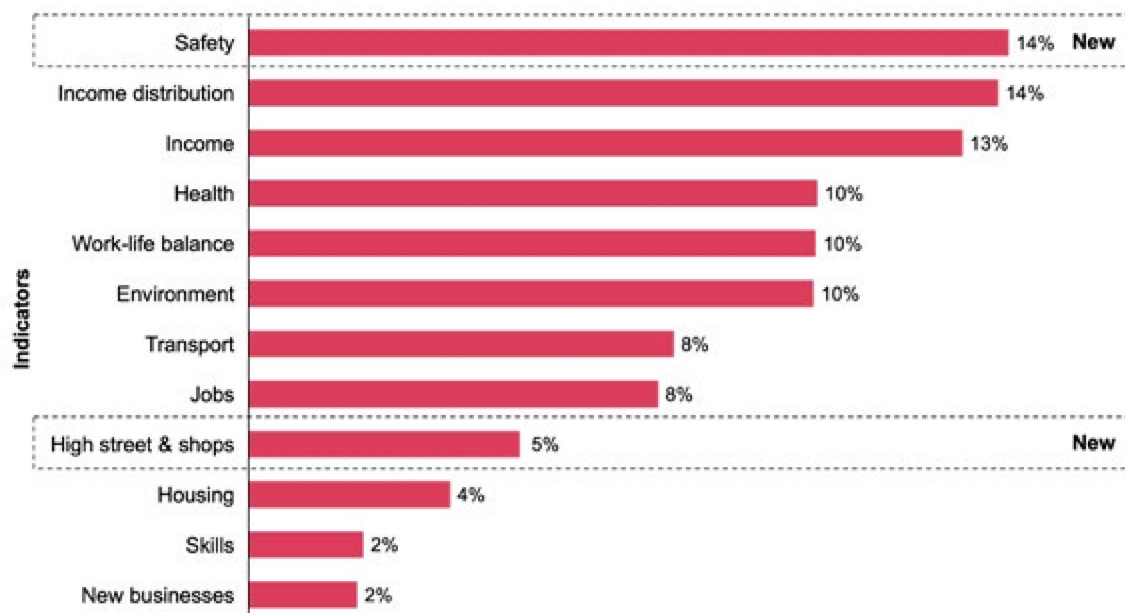
The popularity of these topics, and the emphasis placed on it in our analysis of public priorities, prompted us to update the Index. We now include two new measures of economic success the public feels strongly about: high streets and safety.

² We published our first Good Growth Index in 2011. The first Good Growth for Cities report was published in November 2012.

³ The Good Growth for Cities Index measures life expectancy, this was selected to give an overarching portrayal of the state of health outcomes.



Figure 1: Measures of economic success, ranked highest to lowest in terms of their weightings, rounded to nearest whole number



Source: Demos / PwC Analysis (2021)

Compared to 2020, the weightings for our variables this year see a significant shift in their importance relative to the other and new variables. **Table 1** outlines our weightings from last year's Index and compares them to our weightings this year.

Jobs and Skills, two of the most important variables in our Index last year, see significant decreases in

their relative importance in our updated Index, most likely due to current confidence in the employment market. In contrast, income, environment and income distribution see significant increases. It is possible this change of emphasis is a temporary response to the pandemic and we may see the relative weightings even out in future years.

Table 1: Our revised Good Growth weightings compared to 2020

%	Jobs	Income	Health	Work-life balance	New businesses	Housing	Transport	Skills	Environment	Income distribution	Safety	High Street & Shops
2020	14	12	14	8	6	10	8	12	8	8	N/A	N/A
2021	8	13	10	10	2	4	8	2	10	14	14	5
Change	⬇️	⬆️	⬇️	⬆️	⬇️	⬇️	—	⬇️	⬆️	⬆️	—	

As in our previous reports, our variables are weighted according to their level of relative importance. This year, the weights of each variable were determined via a public polling run by Demos. We used a robust stated preference approach through conjoint analysis in order to deduce these weightings. Further details can be found in the Appendix section.

Important note: Comparison to last year's report is not possible

Due to the extent of the Index refresh, we would not advise making a comparison between the scores in this year's report and those included last year.

Responding to public priorities

Our [Future of Government](#) research has consistently highlighted our view that for the levelling up agenda to succeed, it needs to reach beyond geographic inequalities and better respond to the public's priorities and concerns around the inequalities within regions and communities.

With the publication of the [Levelling Up White Paper](#) on 2 February 2022, we now have a clearer understanding of the Government's vision. Though this vision focuses exclusively on geographic inequality, it recognises there are multiple inequalities which affect people and acknowledges the need for more rounded strategies of economic recovery.

The White Paper outlines 12 national levelling up 'missions' and sets out plans to:

- expand devolution across England
- increase pay, employment and productivity
- commit to domestic investment outside London and the South East
- upgrade infrastructure and public services
- reduce crime
- improve health, wellbeing and pride in local communities

The variables we captured as part of our Index refresh fall broadly in line with the Government's 12 well-rounded missions (as demonstrated by **Table 2** opposite). As cities and regions across the UK develop their levelling up plans, they will need to adopt a similar well-rounded approach. They may find it helpful to consider their performance on the Good Growth Index this year, in order to identify the most and least successful indicators within their geography.

It is interesting to note that in the White Paper's 12 missions, the environment is omitted (in relation to sustainability / climate change). Environment continues to be an important measure of economic success according to our analysis, and our view is that cities and local leaders should consider this indicator in their levelling up plans.

Inequality within London and the South East

While the Levelling Up White Paper turns its attention to improving the economies outside of London and the South East, it is important to recognise there are areas within these regions which experience significant challenges. We explore this further on page 23 in the section on 'Economic recovery as indicated by employment'. The case for focusing on inequality within London and the South East is stronger if other types of inequalities are referenced, such as those between different ethnic groups, men and women, and different generations. Though the focus on regional disparity is critical, so is addressing inequality within regions.



Table 2: Comparison of the 12 missions in the Levelling Up White Paper (LUWP) with Good Growth indicators

Missions / Focus Area in the Levelling Up White Paper	How we measure each LUWP mission in Good Growth for Cities 2021
Living Standards	<ul style="list-style-type: none"> Jobs – Unemployment rate Income – GDHI per head scaled by regional price indices Income distribution – Ratio of median to mean income
Transport & Infrastructure	<ul style="list-style-type: none"> Transport – Average commuting time to work
Education	<ul style="list-style-type: none"> Skills – Skills (16-24)
Skills	<ul style="list-style-type: none"> Skills – Skills (25+)
Health	<ul style="list-style-type: none"> Health – Life expectancy
Well-being	<ul style="list-style-type: none"> Work-life balance – % in employment working more than 45 hrs per week
Pride in place	<ul style="list-style-type: none"> High streets & shops – Retail store openings & closures New businesses – New businesses per head of population
Housing	<ul style="list-style-type: none"> Housing – Housing price to earnings ratio and owner occupation rate
Crime	<ul style="list-style-type: none"> Safety – Total crime count discounting fraud & cybercrime per head of population
Research & Development (R&D)	-
Digital connectivity	-
Local leadership	-

Work-life balance drives Good Growth

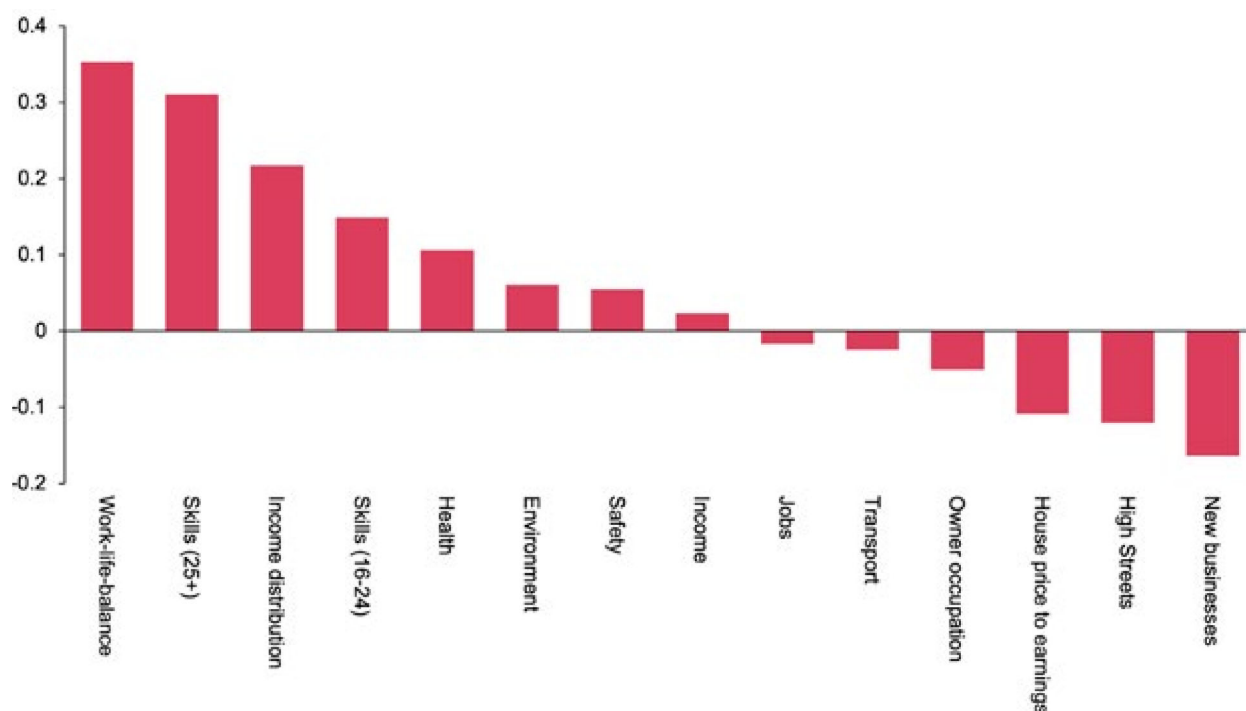
Though there are significant hurdles to be faced on the path to a fair recovery, most cities continue to see improvements in their Good Growth scores⁴. It is also encouraging to see the pandemic has levelled the playing field to some degree between the highest and lowest ranked cities, with the gap narrowing slightly this year.

The 12 variables in this year's index consist of 14 indicators, with housing composed of owner-occupation and house price to earnings ratio, and skills consisting of youth skills and adult skills. Of these 14 indicators, the biggest driver of improvement between 2017-19 and 2018-20 is work-life balance (**Figure 2**). There are also broad improvements in the skills of workers (aged 25+), as well as income distribution and life expectancy, perhaps

reflecting the rise in flexible working patterns.

However, there are signs of declining high streets and new business openings, with the pandemic putting pressure on businesses to find new ways to generate cash. Housing has also been impacted, with a sharp decline in the house price to earnings ratio, highlighting how housing affordability and owner-occupation rates have fallen since the start of the pandemic. Despite efforts from the Government to address housing affordability, through schemes such as the Stamp Duty exemption, the historic increases in house prices are still very much apparent⁵. We expect prices to continue to rise in 2022, though at a slower rate than in 2021 as economic conditions return to pre-pandemic levels.

Figure 2: Average change in score since 2017-19, by indicator of the Index



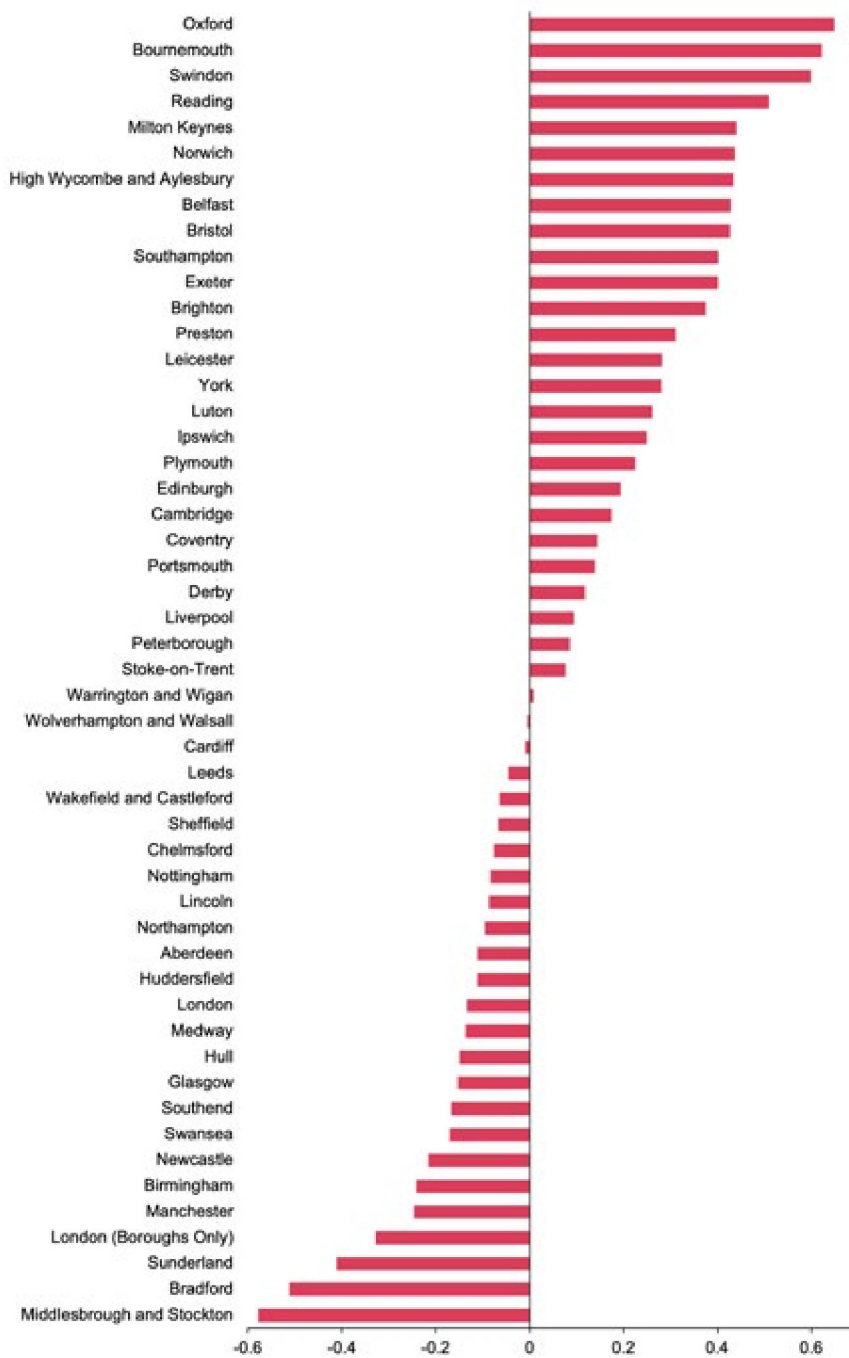
Source: PwC Analysis (2021)

4) Since we have added two new indicators in our composite Index and have an entirely new weighting system, we have rebased our analysis to 2017-19. This enables us to understand the annual changes that we would usually see with the Index.

5) PwC comments on ONS November house price figures



Figure 3: 2018 - 2020 Good Growth Index results by city, ranked highest to lowest



Source: PwC Analysis (2021)

Good Growth scores by city

Oxford and Bournemouth are the two highest performing cities in this year's Index. Oxford performs well on income, health, safety, new businesses and skills (25+), helping to secure its first place position. Bournemouth was last year's highest ranked city, but slipped to second place this year due to a poor performance on jobs and house price to earnings in 2020. Swindon is in third place, performing relatively well across the board on all metrics, with jobs performing particularly strongly this year. Reading rounds off our top four, performing strongly on income and skills (25+).

Figure 3 presents the overall distribution of cities' scores, defined by travel to work areas (TTWAs) and our baseline over 2017-19.

Important note: Comparison to last year's report is not possible

Due to the extent of the Index refresh, we would not advise making a comparison between the scores in this year's report and those included last year.

Spotlight on Edinburgh:

Scottish capital focuses on the ‘missing middle’

The raw assets of Edinburgh give it an undeniable headstart for Good Growth. As a capital city, it is home not only to extraordinary natural and architectural beauty, but to keystone institutions, such as the Scottish Parliament, three universities, a slew of private sector headquarters and its own financial district in the West End.

Yet local leaders are aware that the legacy of the past may not lend itself well to the future. Edinburgh’s rich history and creative scene means it continues to attract workers from surrounding areas, and will always draw tourists. But in the short-term, COVID-19 has hit the tourist sector hard, and more broadly it may have prompted inequalities to widen, leading to a polarised workforce.

The city has a great deal of high paid jobs and low paid jobs, but there is a big gap in between – pointing to a missing middle in Edinburgh’s workforce. The local authority and its partners are **focusing on reskilling opportunities to support workers to progress in their careers, and to bridge the growing labour market gap.** But this reads across another constraint: encouraging a balanced labour market and innovation led growth is putting pressure on supply of the right office and workplace offer.

Unlike many other large metropolitan cities, such as Manchester or Birmingham, Edinburgh does not have large numbers of brownfield sites left vacant by the demise of industrialisation that it can build upon. The city needs to offer more space for businesses to scale up and grow sustainably.

Another key challenge is **transforming Edinburgh’s city centre environment to be fit for the future.** A key priority is to address traffic congestion in the city and improve the quality of the public realm in key locations. While the city is confident of a strong economic recovery, it believes that prospects for progress rest on the quality of its workforce, reducing inequalities, and enhancing the extraordinary legacy of some of Europe’s greatest spaces and places.

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Edinburgh is working to establish a better relationship between innovation growth and the commercial property sector, in order to provide opportunities for indigenous companies and anchor institutions to stay close and to scale up.”

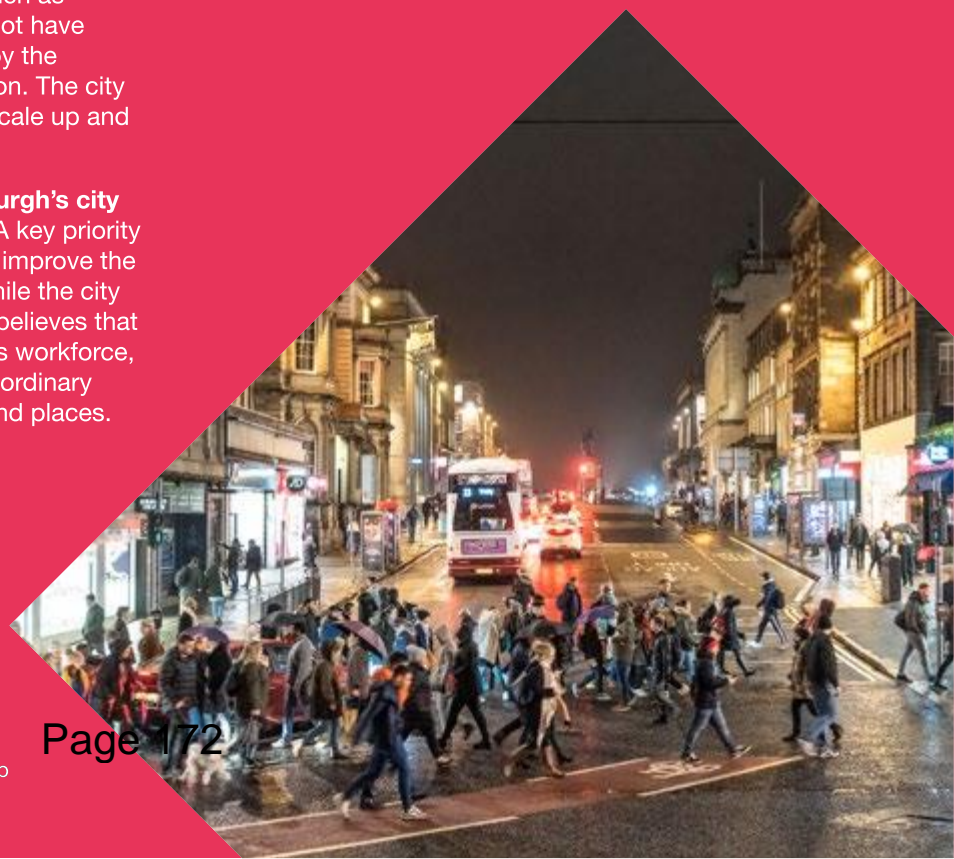
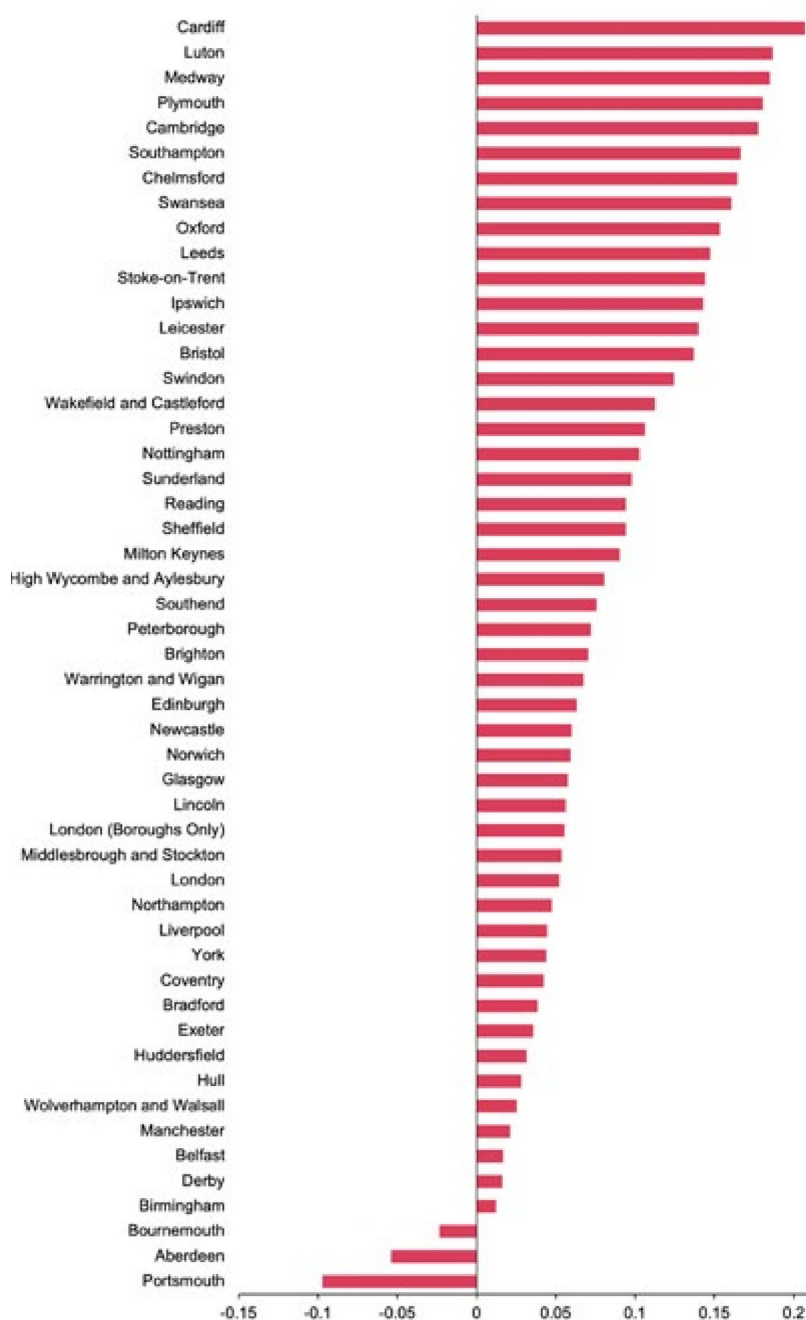




Figure 4: Change in Good Growth Index score by city, from a new 2017-19 baseline index to 2018-20 Index, ranked by highest to lowest change



Source: PwC Analysis (2021)

As shown in **Figure 4**, we observe a marked improvement for Cardiff this year, thanks to improvements in jobs, income and health. Luton and Medway also make significant gains, stemming from improvements in jobs, income distribution and work-life balance.

Important note: Comparison to last year's report is not possible

This graph shows the difference in Index scores between this year and last, had we used our refreshed methodology for the period 2017-2019.

Due to the extent of the Index refresh, we would not advise making a comparison between the scores in this year's report and those included last year.

Spotlight on Belfast:

City targets holistic connection with surrounding communities

Belfast takes a **balanced and deliberately interventionist approach to regeneration**. Local leaders are pro-development in the city core, but believe that any development has to be right for the communities surrounding it. This includes diversifying the city centre to offer more residential accommodation, house greater numbers of students and provide more hotel rooms, office space and improved cultural offerings. All the while, local leaders are investing in place-making, open and green spaces, community infrastructure and connectivity, to create a more attractive, accessible, safe and vibrant city centre – a people focused city centre which draws the wider community in.

City investment plans include a citywide commitment to invest in Belfast's wider neighbourhoods with strategies that **integrate physical regeneration with cultural, social and environmental regeneration, and elongating the city / civic spine**. The city has invested heavily in neighbourhood assets, such as community centres and sports facilities, and will continue to do so through funds at neighbourhood level. These funds allow local organisations to apply for support, in return for allowing the local community to access facilities. Over the last few years, for example, Belfast has invested c.£105m in new leisure facilities for communities.

Central to plans for the city centre is creating a cleaner, stronger and more resilient city core. This is underpinned by the Bolder Vision for Belfast, which aims to rethink how the city's streets and places are used to build sustainable and inclusive growth. The vision sets out the importance of safe, accessible and vibrant local places, and offers a call to action for the council, civic partners, local businesses and the wider local community.

Looking ahead, Belfast is working to establish the city as a cultural centre in order to realise its global cultural and economic ambitions. As part of a **10-year cultural programme** to 2028, it is focusing on providing the right cultural offering, including encouraging independent retailers, unique pubs and art projects. Plans for a Year of Culture in 2024 are already underway, bolstering Belfast's position as a UNESCO City of Music and developing a £100m landmark tourism anchor in the city centre – an authentic experience with Belfast's people and personality at its heart.

For business, Belfast's ambition extends from tourism to financial services to research and development (R&D). The city's innovation and inclusive economic growth plans seek to capitalise on its dual market access, supported by a **£1bn Belfast Region City Deal investment**. Engagement so far has led to Belfast becoming the number one city for global FinTech investments and top European city for new medical software development. This further investment in digital connectivity, funding innovative industry solutions and supporting centres of excellence is intended to drive Belfast forward as a global digital and scientific centre and globally significant destination for innovation.

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Belfast's regeneration plans include accelerating city centre residential development, with ambitions fixed on encouraging the unique cultural offerings the city can present to the world.”





Good Growth scores by Combined Authorities

Figure 5: Good Growth Index scores by Combined Authority area, ranked by highest to lowest 2018-20 score⁶

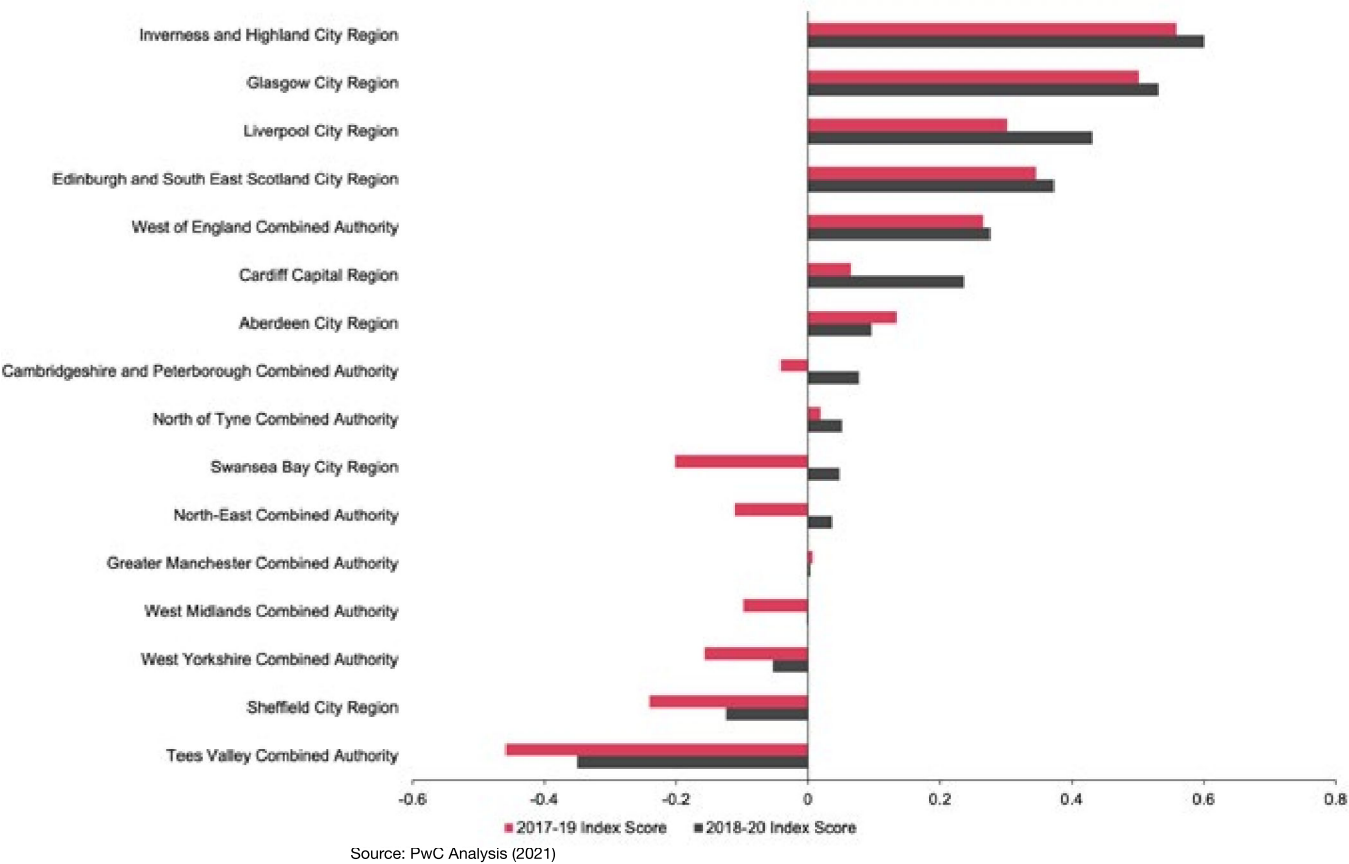


Figure 5 shows the Good Growth Index scores for combined authorities in England and equivalent areas in Scotland and Wales between 2017-19 and 2018-20. Almost all Combined Authorities show an improvement over this time period, with Cardiff Capital Region's significant improvement most notable.

Important note: Comparison to last year's report is not possible

Due to the extent of the Index refresh, we would not advise making a comparison between the scores in this year's report and those included last year.

6) Combined authorities are typically more similar in size to LEPs than cities, and hence LEPs have been chosen as a more appropriate group for comparison. This comparison sheds light on how combined authorities perform relative to other areas across the country.

Spotlight on Cardiff:

Welsh capital renews focus on private sector partnerships

Looking back at the decade leading up to the pandemic, Cardiff's workforce grew by more than 20% – boasting growth of around 5,000 new jobs a year. That's a faster rate than all but one of the core cities in this report. While the city's economy grew across the board, the financial services sector grew the fastest – adding 2,000 new jobs every year and accounting for two-fifths of all new net jobs growth.

Looking ahead, the city's challenge is to share the opportunities around – to develop sustainable communities that **build a workforce for the future**. The local authority wants to connect the right kind of jobs and opportunities in the growth sectors to young people and those in poverty.

With this in mind, the city is **renewing its focus on links with private business and the education sector**. It has secured multi-billion pound investments and private business partnerships for Central Square, Wales' first Central Business District of scale, which is now home to the new headquarters of BBC Cymru. This comes amid investments from Cardiff University in its innovation campus developments and the University of South Wales in its School of Creative Industries.

The city is taking a **sector-focused approach to growth**, targeting key sectors including FinTech, the creative industries and advanced manufacturing and technologies like compound semiconductors. It has given rise to a number of homegrown start ups, such as Delio and Wealthify in the FinTech cluster and the TV production studio Bad Wolf in the creative sector.

As part of its recovery strategy, the local authority is investing in reinvigorating its city centre as it emerges from the pandemic. Footfall in Cardiff has returned to pre-pandemic levels already and the investment in and around Central Square means the city is well placed to lead the economic recovery for Wales. In addition the local authority is also looking at development outside of Cardiff city centre – prioritising investment in infrastructure that will **connect the wider region to the city**. The **£1bn plans for the Metro** aims to cut journey times across the network and more than double the frequency of services on some routes. Further investment is planned to link with the improved Metro

and develop a comprehensive urban public transport system. It is hoped this infrastructure will support the new £150m Arena in the Cardiff Bay waterfront development, which the council sees as an anchor for the wider regeneration of the Atlantic Wharf site.

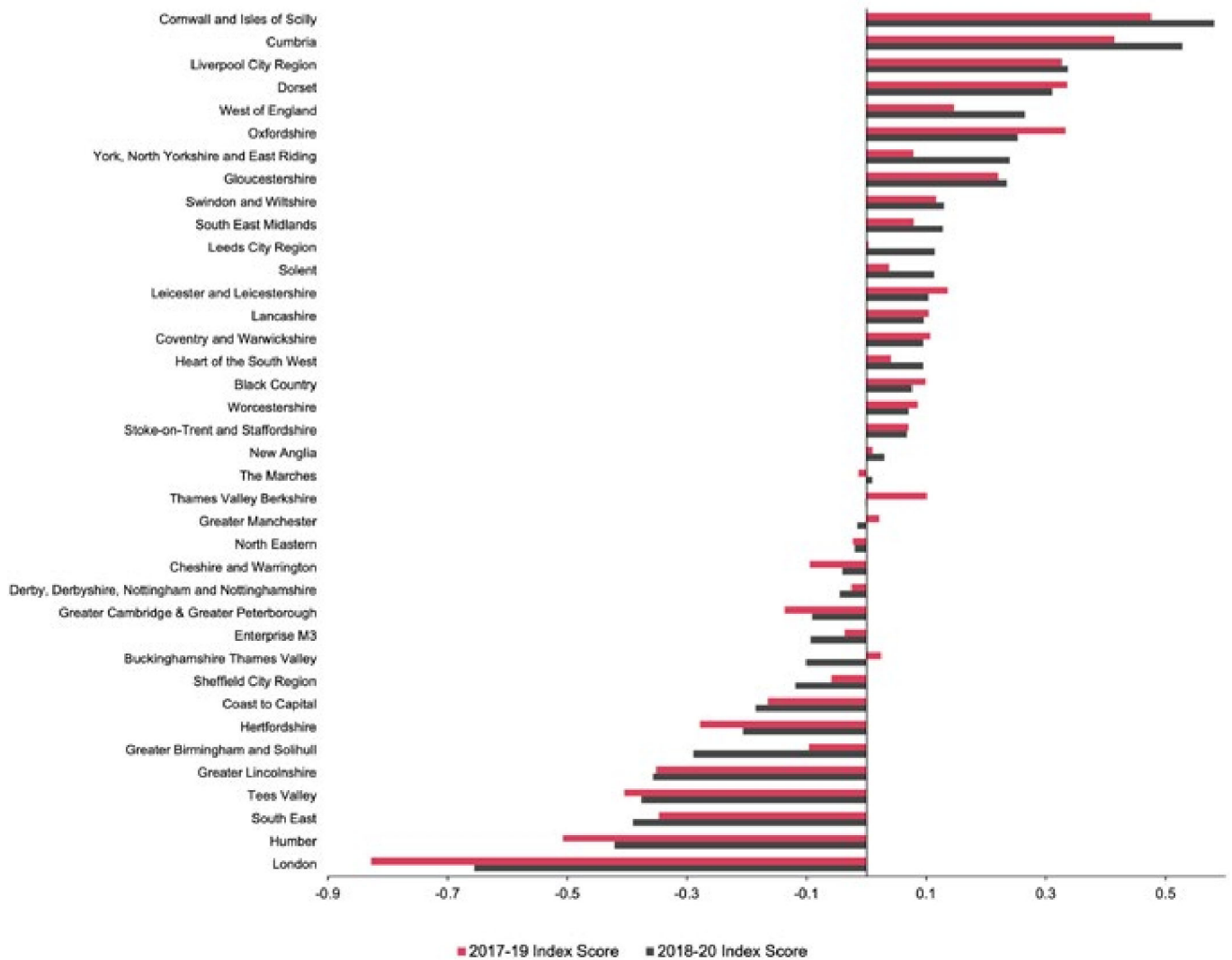
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Cardiff's use of assets to attract and sustain private sector investment has led to strong partnerships, including one with a large insurance firm that is considered the most successful regeneration project in Wales.”



Good Growth scores in England's Local Enterprise Partnership (LEP) areas

Figure 6: Good Growth Index score by LEP, ranked by highest to lowest 2018-20 score



Source: PwC Analysis (2021)

We have also analysed the Good Growth Index scores for the 38 LEP areas in England. **Figure 6** represents the score for each LEP, relative to the average score for all English LEP areas in 2017-19.

Cornwall and Isles of Scilly is the highest ranked LEP this year, outperforming Cumbria which has a similar high score when looking at the 2018-20 baseline index. London and York, North Yorkshire and East Riding LEPs are the biggest improvers from the 2017-19 baseline index.

Important note: Comparison to last year's report is not possible

Due to the extent of the Index refresh, we would not advise making a comparison between the scores in this year's report and those included last year.

Spotlight on Cornwall:

Region plays to strengths with green growth agenda

While Cornwall may not feature in our list of Good Growth cities, it attracts attention for **challenging the concept of a traditional city**. The region gained global recognition as host of the 2021 G7 summit at Carbis Bay, and is currently in the running for 2025 City of Culture. Local leaders often describe it as an exploded city, while maintaining that regions and rural populations can also be engines for growth, not just urban cities.

The Council and Local Enterprise Partnership have made very **deliberate decisions around the type of growth they want to pursue**, exploring opportunities to power growth nationally with clean renewable energy for example. By playing to its strengths as a region rich in natural resources, Cornwall's decarbonisation agenda works with industry and academia to attract investment and kickstart new industries, such as the geothermal energy industry. Cornwall has invested large sums in the first geothermal wells in the UK, including £1.4m in a 4.5km deep well which will heat the Eden Project's iconic Biomes, as well as other greenhouses and offices.

Beyond geothermal energy, Cornwall is focusing on **promoting other renewable energy sources**, developing lithium and critical tech metals, tackling agricultural methane and supporting horizontal satellite launches. In a first for Europe, horizontal satellites will be launched from **Spaceport Cornwall** this year, as part of the UK's pioneering National Space Strategy.

These local growth priorities are driven largely by putting the voice of residents at the heart of both the Council's plans and the 2050 vision for Cornwall shared by all partners. Major listening campaigns have revealed a striking demand among the public for action on climate change, and on housing. As a result, any decisions now made in the region are based on doughnut economics – which incorporate a visual framework for sustainable development. In this case, all assessments are backed by the local authority's 'decision wheel', which ensures **social and environmental considerations** inform all decisions, not just economics alone.

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Behind the picturesque postcards and reports of soaring house prices, Cornish communities are grappling with inequalities that strike at the heart of the nation's levelling up agenda, such as low wages and a housing supply crisis.”



Small cities lead UK recovery

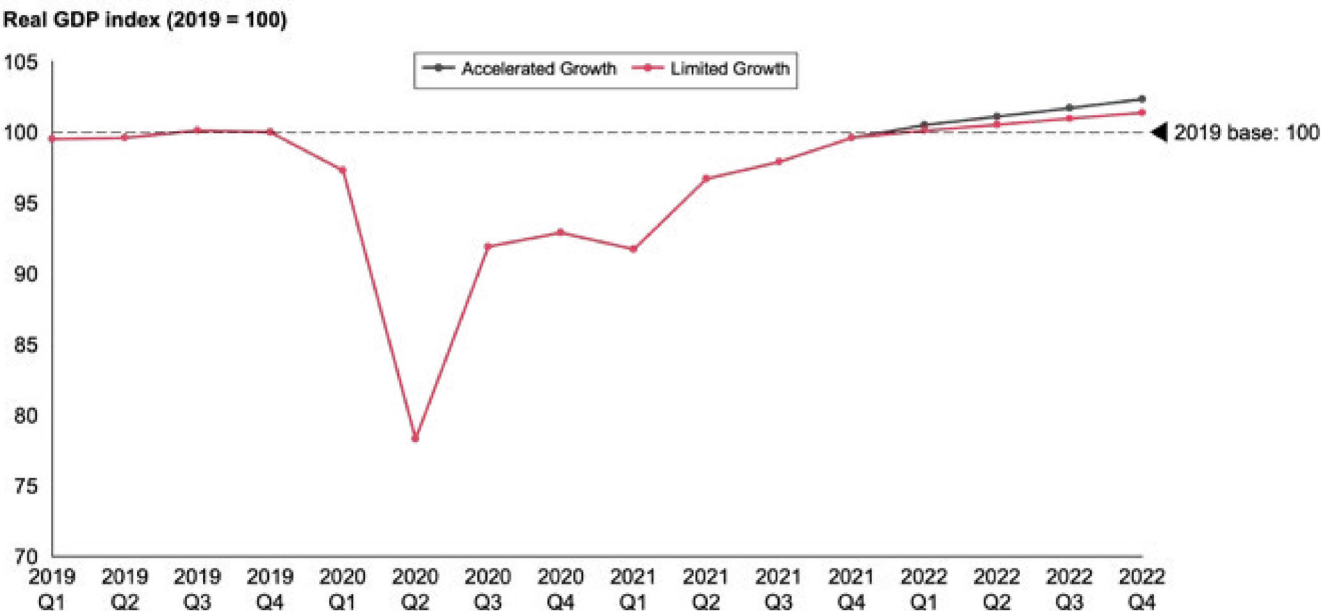
Just as the pandemic has played out unevenly across sectors, regions and households in the UK, we expect this trend to continue to impact the nation's economic recovery and progress with the levelling up agenda, at least in the medium term.

Our analysis points to stronger growth in smaller cities, which we believe is largely driven by the rise of hybrid or home-working patterns. Cities such as Plymouth and Exeter, for example, are expected to see stronger GVA growth rates in both 2021 and 2022 than larger cities more generally. Meanwhile, the South West is estimated to see the highest GVA growth rate over the same time period.

UK's economic recovery from COVID-19

Figure 7 demonstrates our forecast for the UK economy over the 2019 - 2022 period⁷. Based on our latest estimates, the UK economy will reach its pre-pandemic outputs at around 2022 Q1. Figures published by the ONS in February 2022 show the UK economy grew by 7.3% in 2021. We expect the UK economy to continue growing at 5.1% under the 'Accelerated Growth' and 4.5% in the 'Limited Growth' scenario in 2022.

Figure 7: Quarter-on-Quarter growth for UK Real GDP (2019 Q4 = 100)



Source: ONS Gross Domestic Product: chained volume measures, PwC UK Economic Outlook – December 2021

It is important to note that our annual forecasts are based on the economic activity in previous years (base-year effects). In 2020, certain sectors felt the impact of nationwide lockdowns more so than others. Industries such as 'Accommodation & Food services' and 'Arts, Entertainment and recreation'

were hit hard (42.4% and 25.9% decrease in 2020 compared to 2019 levels respectively). These sectors therefore, began 2021 on the backfoot more so than others and significant upturns should be expected if more normal consumption patterns return.

⁷ PwC UK Economic Update, December 2021



How well positioned are UK cities for economic recovery?

The sectoral mix of a city or region, coupled with its demographics, will impact its economic recovery. In response to the significant downturns we saw in 2020, we estimate some sectors will see sharp recoveries as consumers begin to return to more normal spending patterns. In the latest [PwC Hotels Forecast](#), we estimate hotels in London will be earning 43%-86% of their pre-pandemic revenues per available room (RevPAR) and hotels in the regions to be earning 64%-100% of their RevPAR by the end of 2022.

We have reviewed our wider forecasts for sectors in 2022 by exploring key economic data, events and information published over the past year, and the existing expectations we have for the forthcoming recovery.

2021 / 2022 Sector recovery rates

The PwC UK [December 2021 Economic Outlook](#) outlines our GVA estimates on recovery rates by sector for 2021 and 2022. Since then, the [ONS has published the UK-wide annual GVA impacts to each sector in 2021](#). It notes the retail sector is now almost 10% ahead of where it was before the pandemic, while our latest [Consumer Sentiment survey](#) confirms consumer confidence has returned quickly to reach levels above pre-pandemic average. Retail sales recovered quickly after lockdowns or enhanced restrictions, leading to a strong bounce-back for the sector in 2021.

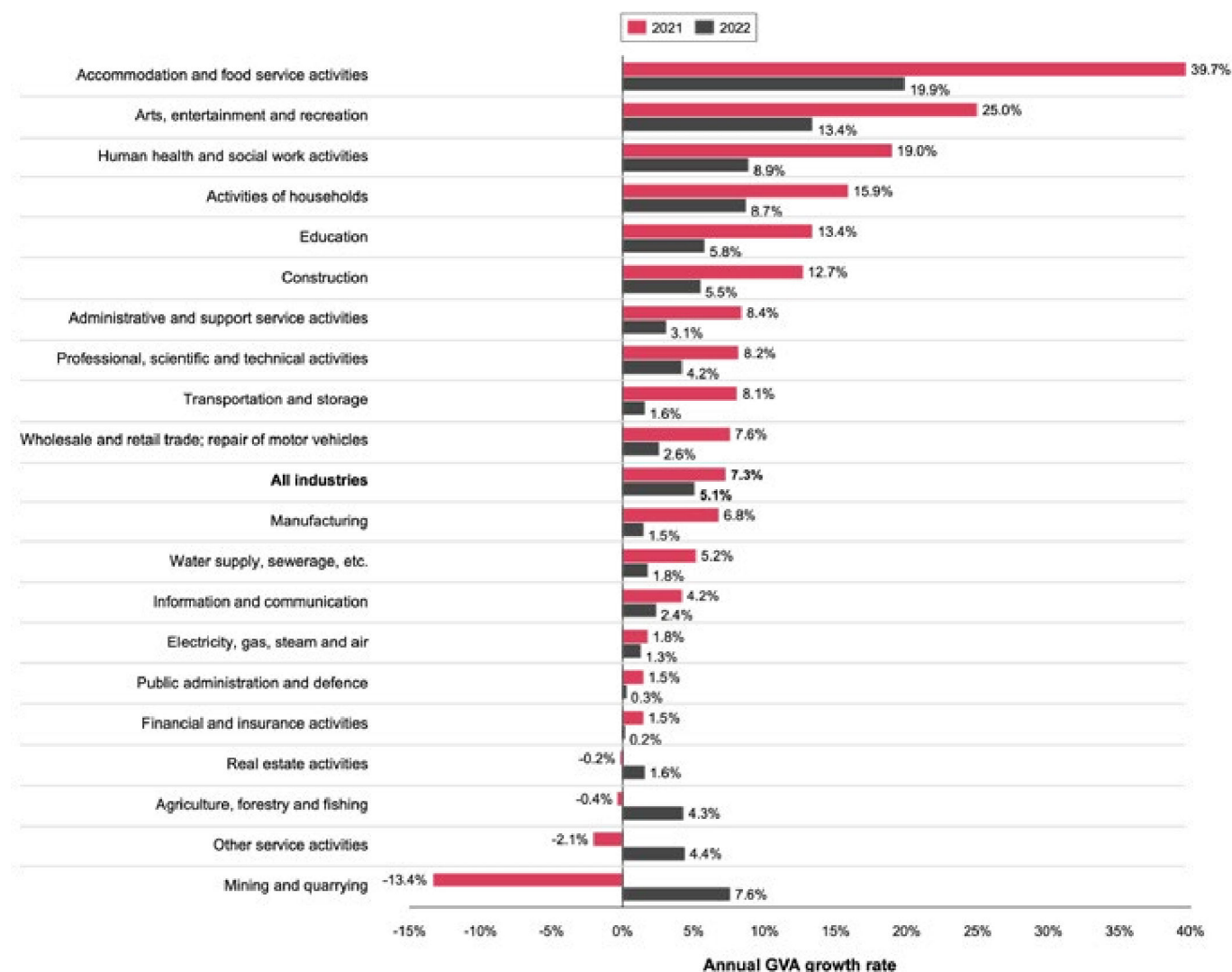
Meanwhile, other sectors are expected to see slower recoveries from the pandemic due to supply chain effects. Real estate, for example, declined slightly in 2021 by 0.2% but we estimate the sector will see a stronger recovery of 1.6% in 2022 as consumer confidence returns in the year⁸. Sectors such as Mining and quarrying, for example, saw significant supply side effects in 2021, prompting continued decline as the sector contracted by 13.4%. We expect these effects to reverse in 2022 with the sector growing by 7.6% in 2022.

Our full estimates by sector are in **Figure 8**.

8) PwC – December UK Economic Outlook



Figure 8: Actual & Projected GVA growth rate by industry sector. 2022 projections under 'Accelerated growth' scenario, % annual change in 2021 and 2022⁹



Source: ONS Gross Domestic Product: chained volume measures, PwC UK Economic Outlook, December 2021

This national level analysis is one of the inputs we use when calculating the GVA impacts to each city's economy in the Index. The other components of the GVA calculation

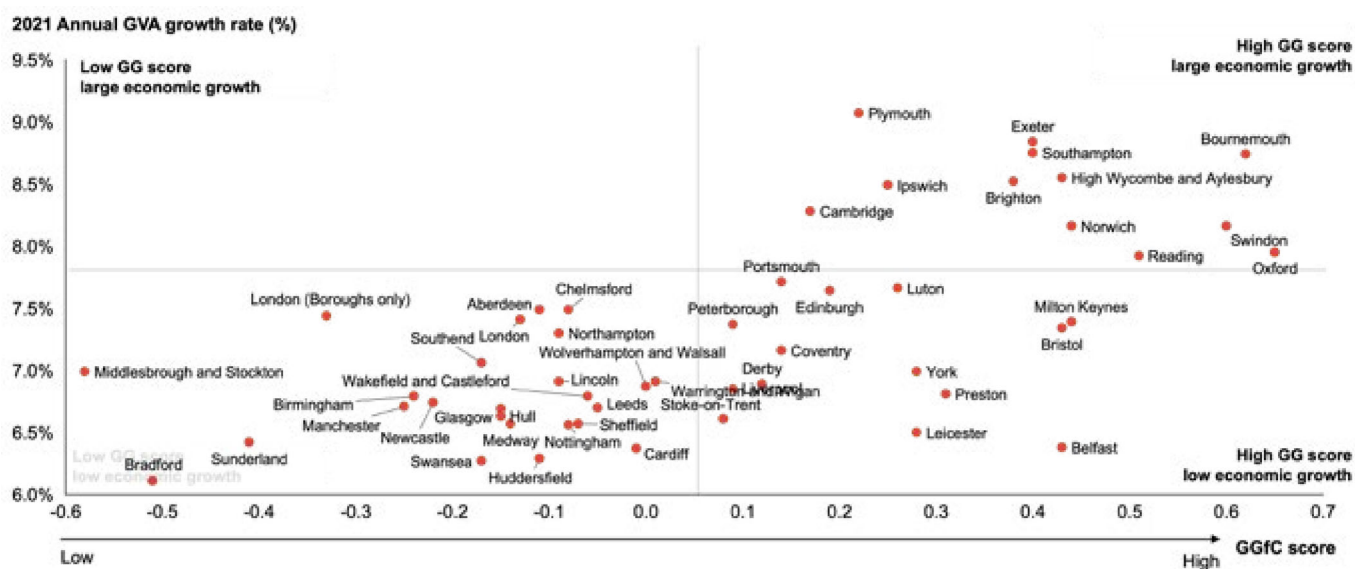
include the COVID-19 local infection rates, the Google Mobility index and Universal Claimant Count statistics (see the Appendix for further details).

⁹ Given current conditions, our projected GVA growth rate is based on a 'Accelerated growth' scenario. However, in our UK Economic Outlook, we also include a 'Limited growth' scenario where the GVA growth rates are lower to each sector in the economy.

Figure 9 illustrates where each city lies in terms of its annual change in GVA growth rate in 2021 and its score in the Good Growth for Cities Index. It is clear that cities will

have very different opportunities as they recover from the economic impacts of COVID-19.

Figure 9: 2021 annual GVA growth rate (%) and Good Growth for Cities Index score



Source: PwC Analysis (2021)



Generally, cities that perform well in the Index are expected to see stronger economic recoveries in 2021 (our GVA analysis is indicative of full year figures for 2021 and 2022 as local authority data has not been published yet, see the Appendix for details).

Cities along the south coast of England are projected to see the strongest GVA growth rates in 2021: Plymouth, Bournemouth and Southampton all have recovery rates of more than 8.0% in 2021. This is largely due to the higher proportions of high-growth sectors in these cities than the UK city average – such as Accommodation & Food Services, which grew by 39.7% in 2021 according to the ONS.

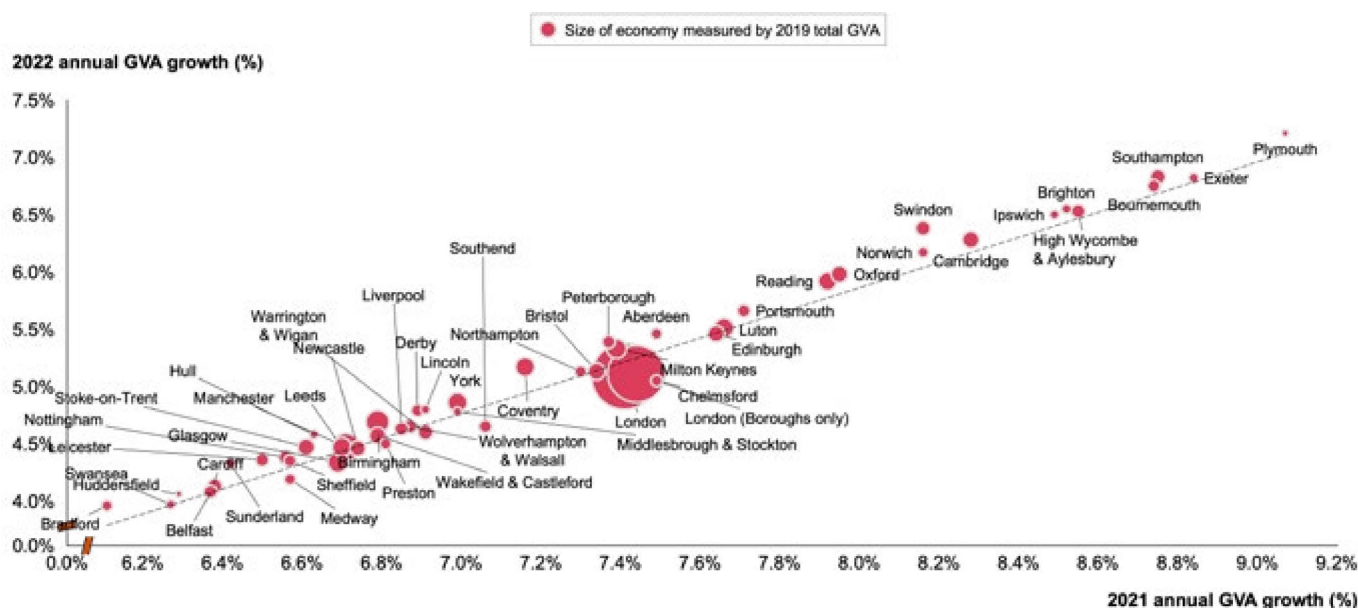
Conversely, cities that perform poorly in the Index are expected to see slower economic recoveries in 2021.

Bradford, Huddersfield and Sunderland all perform poorly in the Index and are expected to recover more slowly in 2021 relative to other cities.

London, meanwhile, is expected to grow by 7.4% which is largely in line with the UK average rate in 2021. Though it is too early to be certain, there is anecdotal evidence that a boomerang effect could be driving better than expected growth in London to some extent. It is possible that, as the pandemic eases, more people will return to the city than some commentators have previously suggested.

Figure 10 highlights the 2021 GVA recovery rates with the 2022 GVA impacts. As 2022 begins, we can expect GVA growth rates to range from 4.0% (Bradford) to 7.1% (Plymouth), with an average GVA growth rate in 2022 of 5.0% across all cities in the Index¹⁰.

Figure 10: 2021 and 2022 annual GVA growth rates



Source: PwC Analysis (2021)

Economic recovery as indicated by employment

Employment continues to be one of the most important indicators in the Index ('Jobs' and 'Income' variables alone account for around a fifth of our Index when combined). Higher levels of employment naturally lead

to an increase in consumer spending which provides a boost to the overall economy. Measuring levels of unemployment therefore, allows us to see how economic recovery rates are faring across the country.

¹⁰ Note: This differs to the UK wide GVA forecast of 5.1%. This is due to not all local authorities being under consideration in our cities for the Good Growth Index

Impact of the furlough scheme

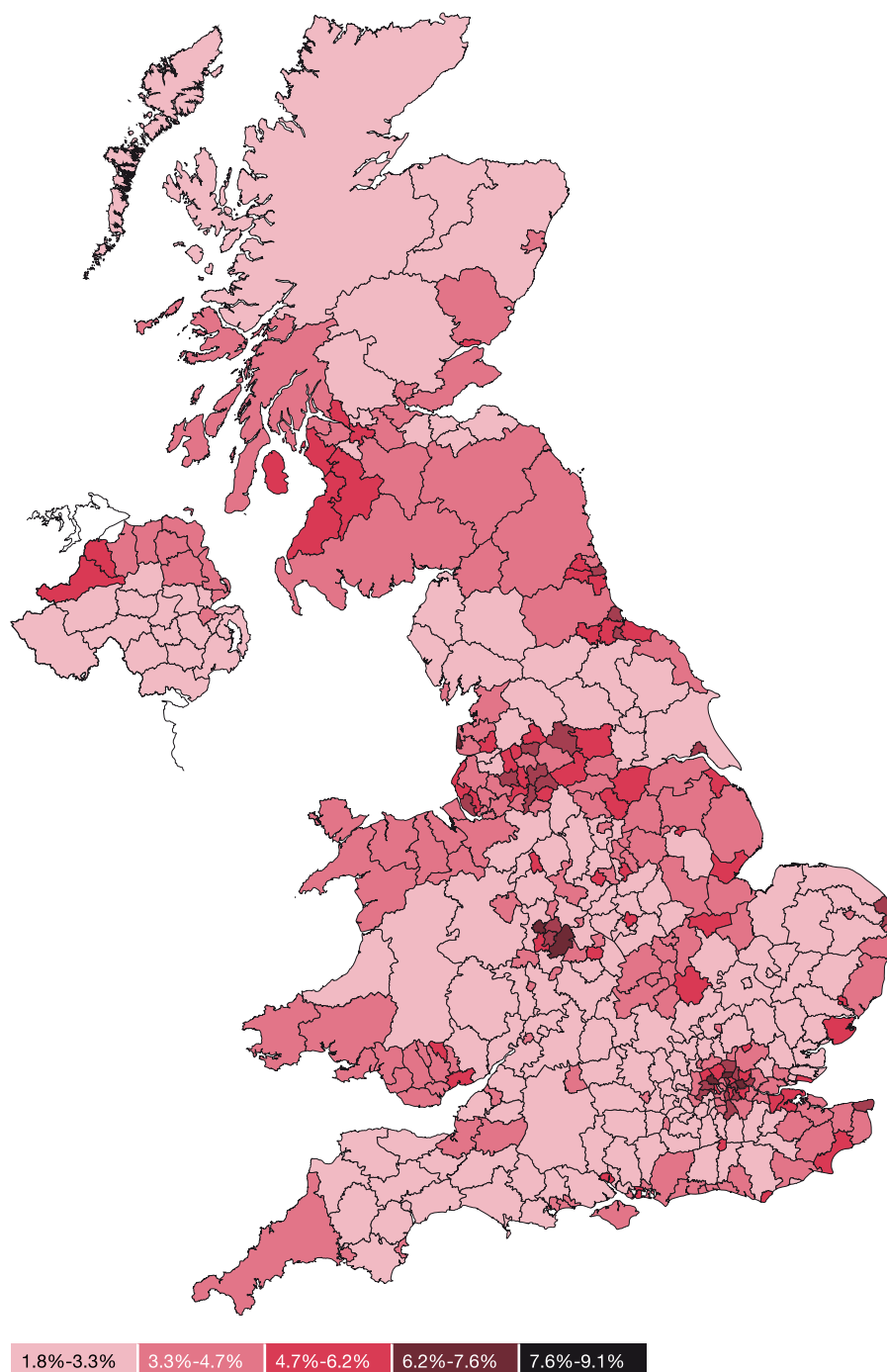
We included statistics from the UK Coronavirus Job Retention Scheme in our economic analysis last year, in order to see how reliant each region was on the furlough scheme. Following the end of the scheme in September 2021, we reflect that:

1. Emerging evidence suggests the end of the scheme has not set back the labour market recovery
2. It will take time to understand the full impact of the end of the scheme
3. The short-term outlook for the labour market is cautiously optimistic
4. There will inevitably be a period of adjustment over the coming months

Overall, we are yet to see the end of the furlough scheme have a substantive impact on the economic recovery across UK cities. However, whether businesses will survive without the support may be called into question as we continue to recover over the next few months. Further lockdowns for new variants could challenge businesses in generating revenue, affecting workers as businesses aim to minimise future business impacts.

As **Figure 11** demonstrates, there continues to be a high unemployment rate in the larger cities in our Index, indicating that recovery is being negatively impacted by Universal Credit claim rates in Birmingham, Bradford, Liverpool, Leeds and London.

Figure 11: Percentage of population aged from 16 to 64, based on mid-year 2020 population estimates, claiming Universal Credit, UK, correct as of 19 February 2022



Source: CC01 Regional labour market: Claimant Count by unitary and local authority (experimental) – January 2022



According to the Office for National Statistics (ONS), the percentage of those on Universal Credit fell by 1.6% across the UK between November 2020 - November

2021, which we see relatively consistently across our cities.

Table 3: Top 10 and bottom 10 city claim rates of Universal Credit, correct as of 19 February 2021

Highest Universal Credit claimant city	Jan 2022	Jan 2021	Lowest Universal Credit claimant city	Jan 2022	Jan 2021
Birmingham	6.8%	8.5%	Bristol	3.1%	4.7%
Bradford	6.3%	8.1%	Chelmsford	3.0%	4.7%
London (Boroughs only)	5.7%	8.1%	Norwich	3.0%	4.2%
Leeds	5.5%	7.4%	Southampton	2.9%	4.4%
Liverpool	5.5%	7.5%	Swindon	2.9%	4.1%
Manchester	5.3%	7.2%	High Wycombe	2.8%	4.3%
London	5.3%	7.5%	Cambridge	2.8%	4.4%
Middlesbrough	5.1%	7.1%	Oxford	2.8%	4.1%
Wolverhampton	5.0%	6.8%	Reading	2.7%	4.2%
Sunderland	5.0%	6.8%	Exeter	2.5%	4.0%

Source: PwC Analysis (2021)

Table 4 shows that the largest and smallest decreases in the claim rate of Universal Credit. We see the greatest decrease in London (Boroughs only), where the claim rate fell from 8.1% in January 2021 to 5.7% in January 2022. Meanwhile, Swindon has seen the lowest decrease since

January 2021, largely because the city's labour force was less impacted by the pandemic originally. This is signified by the change of 4.1% to 2.9% of the working age population claiming Universal Credit in Swindon.

Table 4: Top five and bottom five city increases in the Universal Credit claimant rate, by percentage point (pp), January 2021 to January 2022

Greatest decrease since January 2021		Lowest decrease since January 2021	
London (Boroughs only)	-2.4pp	Leicester	-1.3pp
London	-2.3pp	Belfast	-1.3pp
Liverpool	-2.0pp	Oxford	-1.3pp
Glasgow	-2.0pp	Norwich	-1.3pp
Southend	-2.0pp	Swindon	-1.2pp

Source: CC01 Regional labour market: Claimant Count by unitary and local authority (experimental) – February 2022

Spotlight on Birmingham:

City focuses on those left behind by rapid development

While Birmingham has been very successful in attracting inward investment for development in recent years, city leaders are acutely aware that the growth has not been sufficiently inclusive. The city has a young and growing population, but unemployment is double the national average, and there is a decade's gap in life expectancy between the poorest and most affluent areas. During the pandemic, these widening gulfs have become even more real and more urgent, with the rising cost of living a particular worry.

The city plans to tackle these inequalities with a **decade of inclusive growth** – which will be driven by an ambitious levelling up strategy and a focus on five strategic 'levelling up accelerators'. This decade will be sandwiched between two major events for Birmingham: the **Commonwealth Games** in summer 2022 and the **opening of HS2** in the early 2030s.

To drive the growth agenda, Birmingham is pursuing a levelling-up strategy that aims to **boost the city economy by £9bn a year**, creating c.75,000 jobs. This strategy is built around five key accelerators that will drive change at scale:

1. Longer-term, more efficient **single pot funding** and increased devolved powers for the city to enable increased freedom for investment.
2. The **East Birmingham Inclusive Growth Strategy**, an approach to drive regeneration and tackle deprivation for a quarter of a million of Birmingham's poorest residents.
3. Birmingham's **early intervention and prevention model** to offer support services to residents across the age range that prevent them needing crisis services.
4. **Regional connectivity**, including both green and digital infrastructure, and a comprehensive, affordable transport network.
5. **Retrofitting of social housing at scale** across the three cities of Birmingham, Coventry and Wolverhampton to decrease carbon emissions, improve housing standards and create green jobs.

The local authority is also making efforts to better understand the strengths and challenges the city and its people are facing by creating a **City Observatory**. The observatory will publish and share data and insight on Birmingham, including a baseline of the current state of the city and tracking of progress on levelling up. Insights will be used to understand key issues in the city, the causes of those issues and to drive potential solutions and partnership approaches.

“

Birmingham's challenge is putting the engine of growth to work for those who need it most – the poorer communities that live right up alongside the rapid growth but can't yet feel the benefits.”





Regional recoveries

Based on our mapping of UK cities to regions, **Table 5** illustrates the weighted 2021 and 2022 GVA growth rates by region. The South West is estimated to see the highest GVA growth rates in 2021 and 2022, chiefly

based on the underlying performance of the cities in the region. The South West includes cities estimated to see strong recoveries in both years: Plymouth, Exeter and Bournemouth to name a few.

Table 5: 2021 and 2022 GVA growth rate by region¹¹

Region	2021 GVA growth rate	2022 GVA growth rate
South West	8.2%	6.1%
South East	7.9%	5.9%
East of England	7.8%	5.7%
London	7.4%	4.7%
Scotland	7.1%	4.9%
East Midlands	6.9%	4.8%
West Midlands	6.9%	4.8%
North West	6.8%	4.5%
Yorkshire and The Humber	6.7%	4.5%
North East	6.7%	4.5%
Northern Ireland	6.4%	4.1%
Wales	6.3%	4.0%

Source: PwC Analysis (2021)

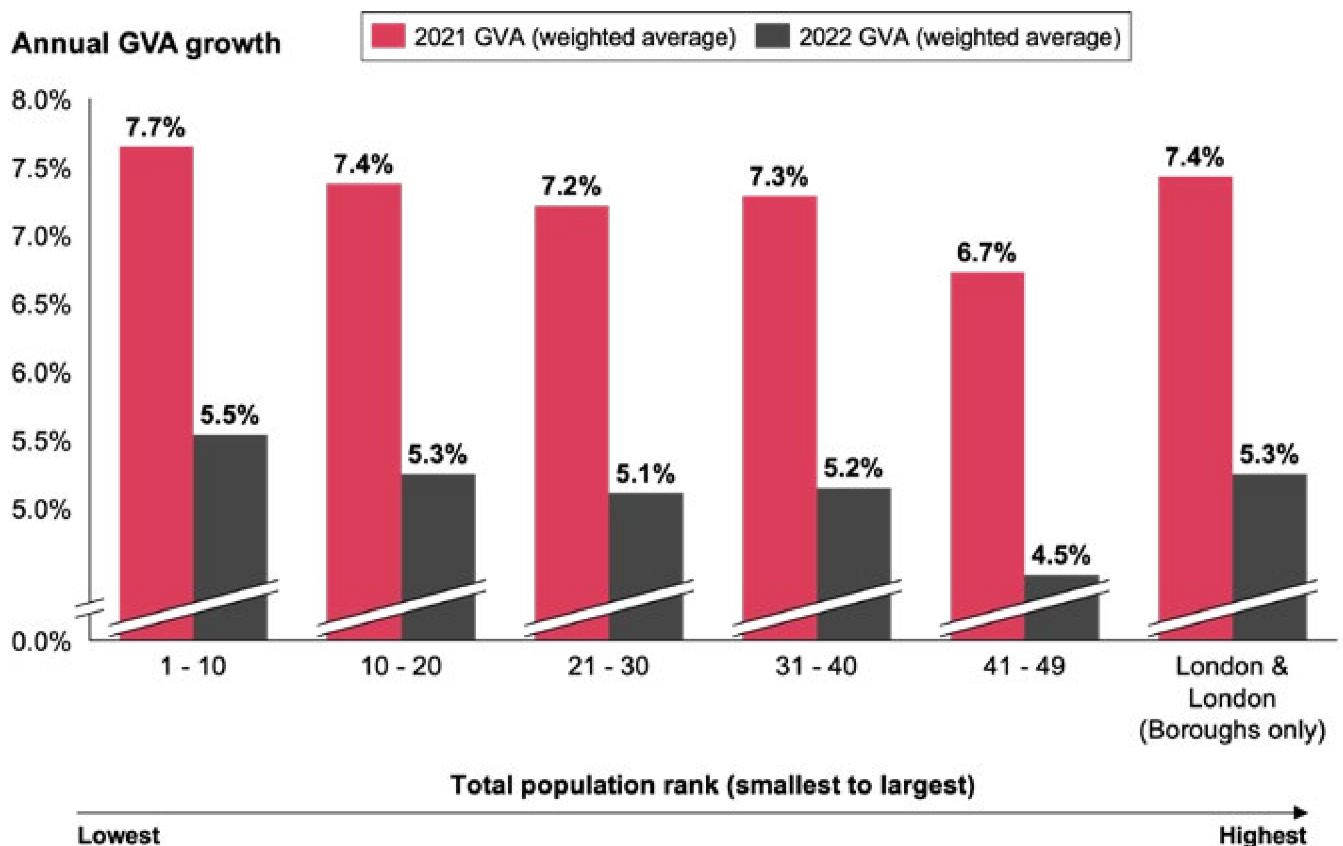
¹¹ Regions are not exhaustive of all local authorities in the region. The weighted GVA growth rates are based only on the cities and proportions of local authorities that constitute the region. Some local authorities in each region are excluded as a result of the mapping.

Economic growth between smaller and bigger cities

Figure 12 outlines the 2021 and 2022 GVA growth rates by total population count (smallest to largest). Based on total population count for each city, the smallest sized cities in our analysis, such as Plymouth and Bournemouth (ranks 1-10), are estimated to see stronger GVA growth rates in both 2021 and 2022 than larger cities generally, with the exception of London & London (Boroughs only). This is likely due to a number of factors, but we believe the main driver is the shift in working patterns caused by the pandemic.

We believe that smaller, provincial cities with lower population counts are benefitting from an increase in hybrid or home working patterns. As people spend less time commuting to larger urban cities, a rise in local spending can be expected, boosting the recoveries of smaller, city economies more so than larger cities. However, it is too early to know if this trend will be sustained – London sees a slightly above average recovery rate in 2021 which could suggest that migration away from some larger cities could be temporary.

Figure 12: 2021 and 2022 weighted average annual GVA growth rates ranked by smallest to largest cities in our Index



Source: PwC Analysis (2021)

Recovery among different social groups

While it is important to track the recovery of cities and regions, it is also vital that we understand how different demographics and societal groups are set to benefit from the recovery.

As previously mentioned, the [Levelling Up White Paper](#) focuses on inequalities between geographical areas, but government, businesses and local authorities would do well to take it a step further and look at the broader inequalities found within each region. This will help to embed fairness in the structure of local policies going forward.

Young workers

Despite the disproportionate impact on young workers during the pandemic, we are seeing indications that the economic recovery for young workers is relatively strong.

As **Figure 13** highlights, 2021 Q3 saw the lowest relative unemployment among 16-24 year olds since records

began in 2001. The quarter saw unemployment levels for this group drop below 4% of total 16-24 year olds for the first time in 20 years, signalling the success in the measures that the government implemented to shield youth unemployment from the pandemic.

In the same quarter however, we also saw the largest quarter on quarter increase in economically inactive young adults. This could partly be explained by the reported rise in further education or early career breaks. The perception of a pandemic stricken economy, where job demand is perceived to be relatively low, is likely to have driven this increase in economically inactive young adults.

While these individuals are not currently contributing to the economy, this should not necessarily be perceived as a poor sign of economic recovery. Rather, adoption of further studies will benefit the economy in the future, as a more upskilled workforce enters the labour market with greater training, making them more productive when they do ultimately enter the economy.

Figure 13: Percentage of young people economically inactive and unemployed from 2001 Q4 – 2021 Q3



Source: ONS – Young people not in education, employment or training (NEET) November 2021

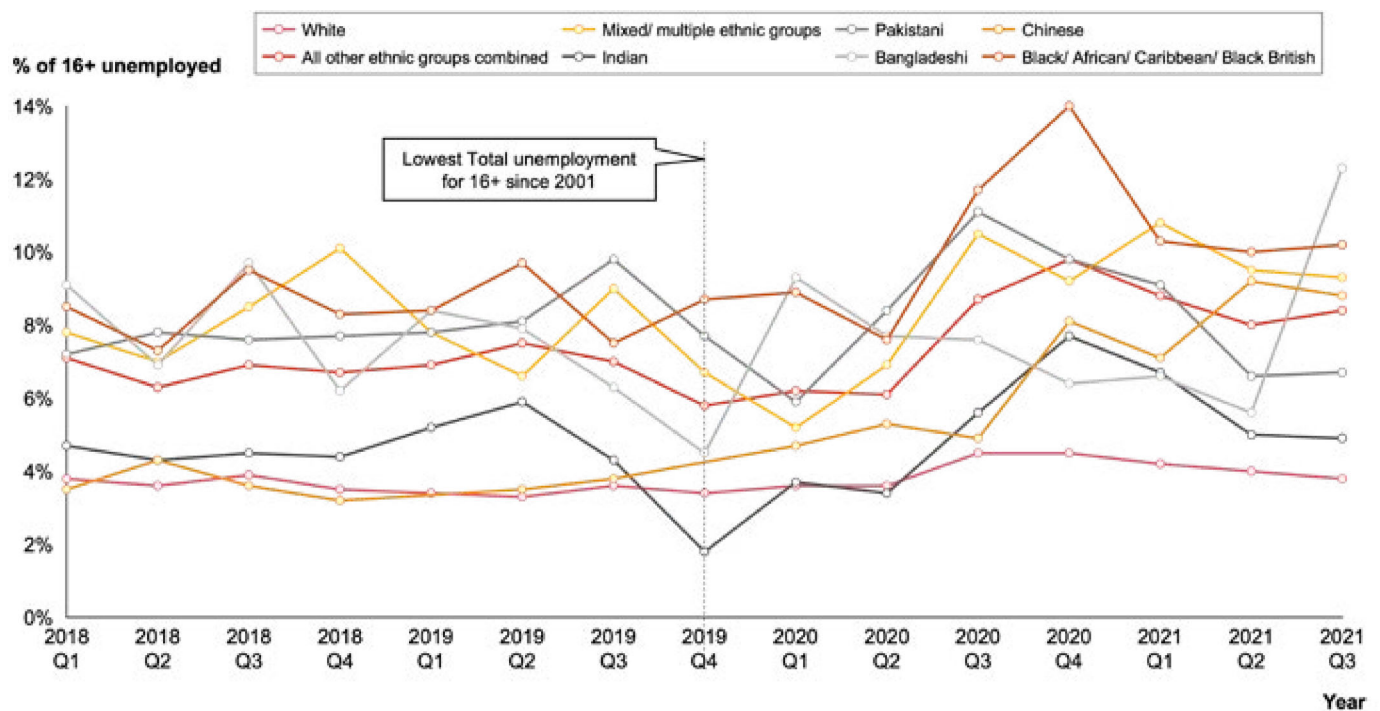
Ethnic groups

The disproportionate impact of the pandemic on racial and ethnic minority communities¹² has been well documented. In the UK, these individuals are reported to be more vulnerable to the effects of the COVID-19 pandemic than their White counterparts. A number of studies since our report last year have explored the likely causes, and in summary it is largely due to racial and ethnic minority groups:

- Coming from poorer socio-economic backgrounds on average;
- Having a higher representation of workers in frontline sectors (such as hospitals); and
- Tending to work on insecure contracts rather than full-time contracts^{13, 14}

The extent of the economic recovery for individuals from different racial and ethnic groups is mixed. **Figure 14** reveals unemployment figures by ethnic group for people aged 16+.

Figure 14: Unemployment by ethnic group, based on people aged 16+ (2018 Q1 to 2021 Q3)



Source: A09: Labour market status by ethnic group – Unemployment by ethnicity: People (not seasonally adjusted). Latest released on 16 November 2021.

¹² For the purposes of this report, we define racial and ethnic minority communities as those people who are non-White

¹³ [House of Commons Women and Equalities Committee: Unequal Impact? Coronavirus and BAME people – December 2020](#)

¹⁴ [UNISON – October 2020](#)

According to the latest figures, all ethnicities are seeing higher unemployment rates than their pre-pandemic levels. However, comparing the difference in unemployment levels between each ethnic group from pre- to post-pandemic paints a more striking picture regarding economic recovery.

White individuals have the lowest unemployment rate of all ethnic groups – with 3.8% of those aged 16+ across all groups categorised as unemployed in 2021 Q3, compared to 3.6% of White individuals. The differences in percentage of people 16+ that are unemployed is summarised in **Table 6**.

Table 6: Percentage of unemployed 16+ people, (2018 Q3 - 2021 Q3)

	2018 Q3	2019 Q3	2020 Q3	2021 Q3
Total	4.3%	4.0%	5.1%	4.4%
White	3.9%	3.6%	4.5%	3.8%
Mixed / multiple	8.5%	9.0%	10.5%	9.3%
Indian	4.5%	4.3%	5.6%	4.9%
Pakistani	7.6%	9.8%	11.1%	6.7%
Bangladeshi	9.7%	6.3%	7.6%	12.3%
Chinese	3.6%	3.8%	4.9%	8.8%
Black / African / Caribbean / Black British	9.5%	7.5%	11.7%	10.2%
Other	5.5%	7.4%	7.0%	9.6%

Source: A09: Labour market status by ethnic group – Unemployment by ethnicity: People (not seasonally adjusted). Latest release on 16 November 2021.

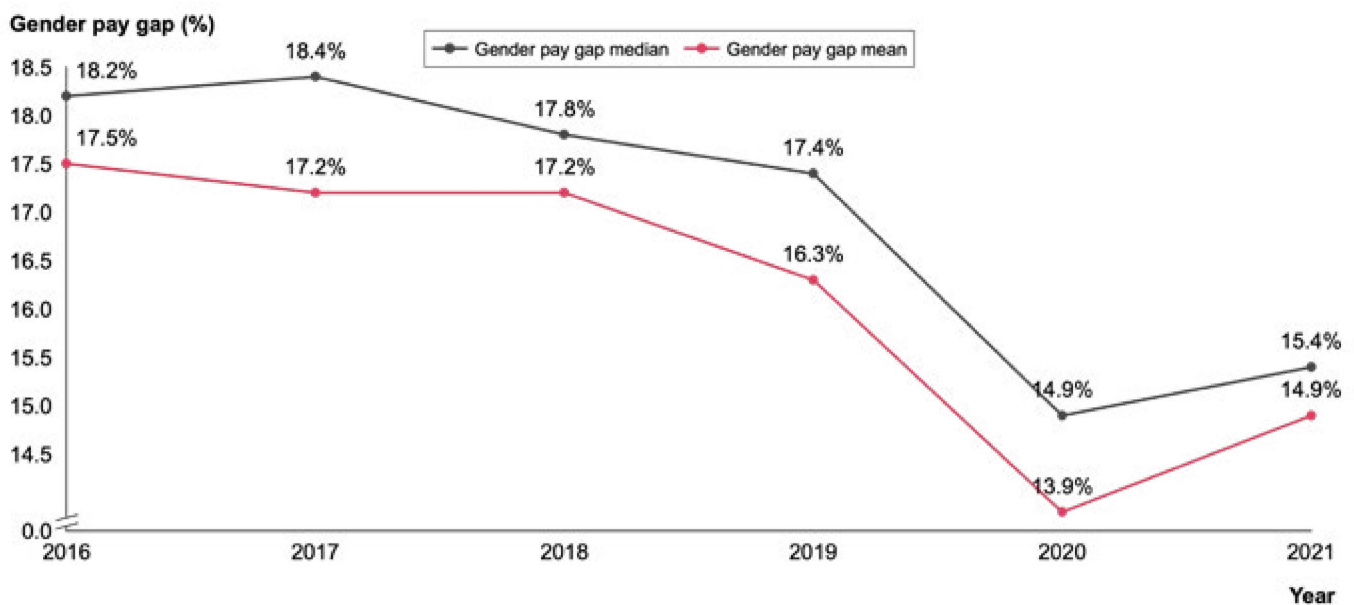
Meanwhile, our [Ethnicity Pay Gap Report 2021](#) shows ethnicity pay penalties have remained stubbornly high over the past seven years in the UK. There are significant differences in the pay between ethnic groups that are magnified once you factor in gender and region, and have worsened during the pandemic. It is evident the economic recovery is not playing out evenly across the major ethnicity groups, and is more supportive for individuals from White backgrounds than those from non-White backgrounds.

Women

Finally, **Figure 15** illustrates the differences in gender pay gap¹⁵ between men and women in the UK. The pay gap has generally improved over a six year period, with the gender pay gap perhaps surprisingly improving in 2020 despite negative impacts of the pandemic on women.

15) For clarity, we define gender pay gap in line with the ONS's definition of the terminology. It is defined as the difference between men's and women's hourly earnings as a percentage of men's earnings.

Figure 15: Median & Mean gender pay gap at UK-wide



Source: ONS – Earnings and hours worked, place of residence by local authority: ASHE Table 8.12 – Gender pay gap

However, since the furlough scheme came to an end, we have seen the gender pay gap increase. Caution therefore needs to be taken when assessing whether women are benefitting from the economic recovery. The shift towards hybrid working, alongside new and growing industries, has the potential to increase wellbeing and productivity for both men and women in the workforce. Yet our Future of Government [research](#) shows there is a risk women will not benefit as much as men. Targeted measures will be required in order to support the economic recovery for women going forward.

Green jobs: an opportunity to embed gender equality in the future workforce

According to our Future of Government report, [Targeting gender equality](#), most women believe they are ill-equipped for green jobs, lacking the right skills and opportunities to benefit from the green economy revolution. Just 21% of women are aware of opportunities for green jobs, compared to 32% of men. Similarly, just 20% of women feel they have the right skills to work in a role in the green economy, compared to 31% of men.

Our research supports the view that targeted measures by the government would help women to apply for roles in the green economy. Career support schemes, improvements in parental leave and flexible working patterns are all measures that can be applied to roles in the green economy in order to make the roles more appealing for women.

Agenda for action

As central government, businesses and local leaders come together to think innovatively about how the UK adapts to the impact of the pandemic and moves forward, they should do so in a way that does not leave people, or places behind.

We believe that efforts to secure a fair economic recovery and build sustainable growth should focus on the following:

1) Levelling up and the reality of regional inequality

It is well documented that the UK is one of the most geographically unequal countries in the developed world, and that despite the presence of deprivation within the region, productivity is highest in London and the South East.

Actions for central government

The Levelling Up White Paper announced a package of 12 missions for levelling up for the UK to achieve by 2030. The Government may wish to now focus on the detail of how these missions will be delivered at pace, and should look to:

- Work with local leaders and industry to develop a roadmap for the delivery of each of the 12 missions, including outlining measurable and achievable targets to translate goals into visible outcomes.
- Establish a UK-wide outcomes framework, encompassing a broad definition of economic success, and gather hard evidence against this framework, to track the impact of government funding and deliver targeted interventions to support levelling up.
- Leverage the funding packages referenced in the White Paper with a view to addressing the fragmented nature of how some investment decisions are made, refreshing the processes associated with decision making and resourcing to use the available funds as efficiently as possible.

Actions for local leaders

Our research shows the public's priorities for levelling up go beyond investment in infrastructure and transport. Local leaders should consider responding to the public's concerns in order to deliver Good Growth for their region. We suggest that local leaders look to:

- Invest in relationships across the public, private and third sectors as a foundation for developing comprehensive strategies for place-based transformation, facilitated by a frictionless and enabling planning system.
- Focus on providing high quality employment through sector-focused investment, including investment in human capital, to boost available jobs and match these to local skills, particularly for young people.
- Develop and implement integrated programmes of investment in infrastructure and local services, including investment into high streets, to create safe, sustainable and vibrant local communities.

Actions for businesses

Our previous research shows businesses have the opportunity to build public trust by playing a greater role in the levelling up agenda – improving the opportunities, social mobility and equality in the places they operate. Businesses can look to:

- Take a proactive role in developing local economic strategies, in partnership with local and regional leaders, to identify strategic priorities to boost productivity and support innovation.
- Play a greater role in delivering a fair recovery across the UK, with a particular focus on reskilling and upskilling, to ensure people are equipped with the right tools for future jobs, particularly in green growth industries.
- Seek collaborative ventures, including partnership and coordination roles, with central and local government, charities and community groups to create business opportunities and improve the effectiveness of levelling up interventions.



2) Capitalising on growth outside larger metropolitan cities

The Government's levelling up agenda focuses on inequalities between regions, but inequalities within regions can be just as challenging, particularly when comparing urban and provincial areas. The latter are commonly challenged by low wage levels, connectivity issues, and skills deprivation.

Yet strong interdependencies exist between urban and rural areas. Almost 16% of England's GVA in 2019 was attributed to predominantly rural areas – highlighting the need to maintain traditional rural produce, and propel new technologies, such as agri-tech and energy generation.

Actions for central government

The Government should continue to recognise the potential in provincial areas and the interdependencies that exist between urban and rural. Provincial areas are at risk of greater social and economic exclusion without serious improvement and investment from the Government in digital connectivity.

- The Government has made progress in combating the digital divide through initiatives such as Building Digital UK – with Project Gigabit aiming to reach 85% coverage by the end of 2025. When it comes to levelling up initiatives such as these, the Government may wish to be transparent about how budgets will be allocated, and set realistic targets in order to maintain trust.
- Government policy should aim to help places help themselves. Business and local growth requires sustained support at a local level which is sensitive to local opportunity and context. The Government could reassure local leaders that its proposal for capital investment and development is worthwhile, by building on the principles it has announced for county deals, and providing a 'devolution framework' which sets the parameters within which deals will be agreed.

Actions for local leaders

Local leaders should explore the opportunities and inequalities that exist within their regions. They have the opportunity to capitalise on the recent success of rural or provincial areas through sustainable Good Growth that can power neighbouring cities and bring economic and social benefits back to the rural areas. Understanding these interdependencies will be the first step for regions, as a whole, to build Good Growth.

- As stated previously, almost 16% of England's GVA came from predominantly rural areas in 2019, and there are many examples of successful rural environments capitalising on their rural assets, such as Cornwall (see Spotlight on Cornwall). Regions and local leaders must seek alternative opportunities to power growth nationally and benefit their communities through investment.
- The pandemic has exposed the shortcomings of people's living and working arrangements in urban areas, and placed greater value on surrounding green and/ or garden space. Local leaders may wish to emphasise their offerings of greater work-life balance as viable alternatives for city living, by creating affordable housing options, shared working spaces, and improving transportation links between urban and rural areas.
- Building an intra-region circular economy could be a focus for local leaders, in a way that incentivises green growth and shopping locally, promoting the consumption of produce from within the region.



Actions for businesses

Businesses have a vital role to play in managing the gap between urban and provincial areas by recognising and capitalising on the potential in local areas, from skill retention and asset building to pioneering the future of flexible working.

- Provincial economies typically experience a deprivation of skilled workers as a result of low wages or better opportunities being offered in more urban areas. Businesses can improve this by investing in the development of talent, through retraining and apprenticeship programmes.
- Businesses should continue to explore ways to increase flexibility for their employees in a hybrid working environment. Greater flexibility and the opportunity to decide when and where to work may encourage more employees to help support rural and provincial economies, at the same time as helping larger metropolitan areas recover.
- In partnership with local leaders, businesses can push forward the circular economy and green growth agenda by exploring opportunities to localise supply chains as much as possible, reducing excessive carbon emissions from production and transportation and capitalising on local assets.

Spotlight on Northumbria:

NHS Trust sets sights on becoming regional powerhouse

In its response to COVID-19, Northumbria Healthcare NHS Foundation pushed the boundaries of its expected role. It set up a PPE factory which not only revived the local textile industry, but is now set to become the country's leading PPE supplier for NHS Trusts.

While the Trust does not operate in a city, it is inextricably linked to the economics and culture of both the Newcastle City region and the North of Tyne Combined authority, pointing to the important role it plays in both rural and urban communities across Northumbria. The Trust was the first in the UK to formally commit in 2021 to tackling the issues that drive health inequality – the **Community Promise package** reaches across six broad pillars: poverty, education, economy, environment, wellbeing and employment.

In a bid to **improve resilience and skills in the community** the Trust has set up the Northumbria Manufacturing and Innovation Hub. During the pandemic, the hub set up the PPE factory in order to guarantee a PPE supply for local healthcare workers and reduce costs. By the end of 2020, the factory had produced more than two million gowns, and expanded into other products such as isolation gowns, scrubs, masks and even pillows.

The expansion of the factory has brought the **local textile industry back to life** – initially re-engaging retired seamstresses as volunteers, the hub now trains a paid workforce as part of a high-tech future textile industry and offers facilities and equipment such as a clean room, lasers and branding machines.

There are plans to go further, to train a future workforce in healthcare as well as textiles. It has committed to a **30% increase in apprentices**, with programmes offering opportunities to Looked After Children and people from socioeconomically deprived backgrounds. Through its outreach programme, the PPE factory is also producing miniature scrubs to send to schools to engage children with the NHS and to widen participation in local communities.

“

Northumbria Trust seeks to use its position as an anchor institution to drive a strong local supply chain – increasing local jobs for local people and providers, rather than defaulting to national providers.”



3) Driving social mobility and addressing intergenerational inequality

The pandemic has set back social mobility in the UK, deepening divides between generations in particular, with younger generations hit hard over the last two years. The impact of the pandemic, coupled with rising inflation, cost of living, and house prices, will continue to widen the prosperity gap between the old and the young, unless significant action is taken.

Actions for central government

Central government should continue to seek ways to alleviate the housing crisis. Our Future of Government report [Driving social mobility](#) found that only 27% of young people consider home ownership to be representative of social mobility, compared to 41% of older people, highlighting the fact that home ownership has become largely unattainable for many young people.

- Despite responses from the Government to address housing affordability, through schemes such as the Stamp Duty exemption and ‘Help to Buy’, neither of these have seen significant improvements in lower-price housing access due to an unresponsive housing supply in areas with greater job opportunities, such as Greater London. The Government should seek alternatives to increasing the access of housing in desirable areas.
- Central government can work with local authorities to boost housing growth in commutable locations, in order to boost levelling up and development outside London and major metropolitan areas.
- Amending policy to allow the building of new houses on green belt land with no environmental or amenity value has been successfully pursued in some areas¹⁶.

Actions for local leaders

Young people (employees under 25) were the primary receivers of the furlough scheme¹⁷ during the pandemic, as a result of the large impact on the hospitality and retail sectors. Looking ahead, respondents to the [Social Mobility Barometer 2021](#) said boosting employment should be a top priority for the Government’s recovery programme (47%)

followed by addressing mental health issues (46%) and improving access to education (33%)¹⁸. Local leaders can support in actioning this in the following ways:

- Local leaders work with central government to shape local education requirements, build partnerships and highlight opportunities to assist the Government’s devolution agenda.
- Local leaders may wish to engage with schools early in the education cycle to help share insights on varied employment options and encourage networking and mentoring programmes (see Spotlight on Northumbria for how the Healthcare NHS Foundation has engaged young children with the NHS).

Actions for businesses

This year’s Good Growth Index shows a significant difference in how 16-25 year olds rank the importance of skills compared to those 25+, with younger people placing lower importance on skills compared to other Index measures, such as income. Businesses should engage with this shift and actively engage with young people and the skills system.

- Businesses should recognise the cost that the pandemic has had on the upskilling experience for young people, whether that be virtual fatigue and the perception of online training, or that new hybrid ways of working have made it increasingly difficult to learn from colleagues on the job.
- Businesses can begin to reimagine the upskilling journey, but first they may wish to increase their involvement with education and training providers, as well as apprenticeship schemes, to understand where improvements can be made to reinvigorate the learning experience.
- Businesses should look strategically at the skills system, focusing on skills that will enable the capabilities of the future.

¹⁶) [LSE: The UK housing crisis](#)

¹⁷) [Job retention statistics](#) – Furlough by age

¹⁸) Social Mobility Barometer

Spotlight on Cambridge:

City looks beyond ‘best in class’ to deliver fairness

Cambridge is renowned for its historical and intellectual assets, which draw more than eight million visitors from across the world every year. Since the 1960s, growth in Cambridge has been driven by the ‘**Cambridge phenomenon**’, a boom in innovation and industry focused around technology and the life sciences. This rapid growth continued throughout the pandemic, with Cambridge ranked as the leading regional technology city in the UK last year.

Demand for ‘best in class’ research and development space in the city this year was three times the available capacity, as the city attracted more than £1.3bn in investment for companies rich in intellectual property. Cambridge’s growth, however, has brought challenges, in the form of **widening inequality in the city** and a lack of social mobility – with the city among the lowest 20% of local authority areas for social mobility.

In response, Cambridge’s strategy for the city focuses on **delivering fairness and holistic growth**. This includes committing to £70m funding for social housing, and £100m for affordable housing in the wider devolution area, as well as setting out a five year plan to end homelessness. The latter includes innovative initiatives, such as working with SoloHaus, to provide 18 safe and sustainable pods as a stepping stone out of homelessness.

The city aims to **create a sustainable, connected region** to support these housing initiatives. As part of the Greater Cambridge Partnership, £500m has been earmarked for transport infrastructure, particularly green public transport and cycleways, up to 2030. Further investment is destined for green infrastructure, in areas such as waste and energy. Some £227m in government investment is being used to support the relocation of Anglian Water’s wastewater treatment plant to create a zero-carbon plant nearby. In its place, the city is seeking to **build a new sustainable district for the city**, consulting with local residents to design a low-carbon site with space for nature.

Cambridge’s growth will continue to attract inward investment, new jobs and innovative businesses. To support plans for fairer, greener growth the city council has kicked off a conversation with residents and

businesses around corporate citizenship. Many local businesses are developing Environmental, Social and Governance (ESG) strategies and recognise that they can make an important long-term contribution, with public and third sector partners, to help address social inequality, achieve net zero and promote greater biodiversity.

“

There is a pressing need for more affordable housing, with Cambridge consistently ranking among the top five least affordable cities in the UK, as well as being deemed the most unequal UK city for income.”



4) Green growth to provide a basis for all future action

The appetite for green growth continues to expand amid increasing calls from the public for the Government, businesses and local leaders to prioritise sustainability. Our [Green Jobs Barometer](#) has built an evidence base to track the relative performance of UK regions and industry sectors on their progress in developing green jobs over time. As the country works towards net zero and a greener economy, regional differences are emerging. It is clear support and investment is needed to ensure accessible green employment grows in the places it is needed most.

Actions for central government

Sustainability continues to climb the Government agenda, with Glasgow hosting COP26 in 2021 and the publication of the Government's Net Zero Strategy: Build Back Greener. Central government needs to deliver against sustainability targets, while ensuring the green economy acts to decrease, not widen, inequalities. The Government should look to:

- Outline a bold approach to delivering its Net Zero Strategy, using investment to drive change at the forefront of innovation and incentivise local leaders and businesses to prioritise green initiatives.
- Integrate equality measures into green objectives to ensure the legacy of the green transition is not a reduction in economic opportunity for regions that have yet to capitalise on green opportunities.
- Prioritise investment into accessible green technologies and infrastructure, such as electric charging infrastructure, to provide jobs, increase resilience and promote use by the general public.

Actions for local leaders

Over the last year, the number of local authorities declaring a state of climate emergency rose by 13%. Delivering green growth will require the right decision-making processes, investment and skills. Local leaders should look to:

- Embrace the green opportunity by updating regional industrial strategies to focus on emerging green sectors, such as renewable energy supplies, green transport and low-carbon infrastructure.
- Embed sustainability at the heart of local and regional development through the creation of holistic decision making frameworks, accounting for social, environmental and economic considerations.
- Boost productivity by investing funds and resources into green upskilling, to match workforce skills with emerging green jobs.

Actions for businesses

Our [25th Annual CEO Survey](#) reveals that commitments to purpose and environmental, social and governance (ESG) are on the rise. There is a growing focus among business leaders on trust, transparency and personal accountability. Successful strategies, as referenced in our report [ESG and Growth: A New Way of Thinking](#), are grounded in an honest assessment of their strengths and weaknesses, with an eye on the future. With this in mind, businesses should look to:

- Craft a coherent and actionable strategy to deliver sustainable growth by breaking down ESG considerations into a set of manageable actions and selecting the areas in which they want to compete.
- Make use of innovation hubs and grants to collaborate across public and private institutions, to embrace innovative ways of working and disruptive technologies.
- Unlock efficiencies through incentivising better use of resources, including decreasing waste and energy usage.
- Drive social mobility, as well as racial and gender equality, in green sectors by offering accessible educational pathways, including skills programmes and apprenticeships, and increased support for career progression.

Appendix

Good Growth Index methodology

In developing the Demos-PwC Good Growth for Cities Index this year, we have used the same methodology as in previous editions. This year, we have made our usual minor adjustments to the periodic data that we assess, but have made more significant changes to our geographic definitions and have included two new variables in our Index. The way we have included our two new indicators remains consistent with the method observed in our first edition. The variables, and the weights applied to them, are outlined in Table A1 below.

Due to the differences in the way we have captured the analysis this year, we caution against drawing comparisons to our report last year as the underlying methodology is inconsistent. Our overall approach to developing the Index is summarised in **Figure A1**.

Where local authority level data is missing gaps have been benchmarked to an appropriate local or regional alternative. However, this has not had a material impact on the results.

Figure A1: Our Approach

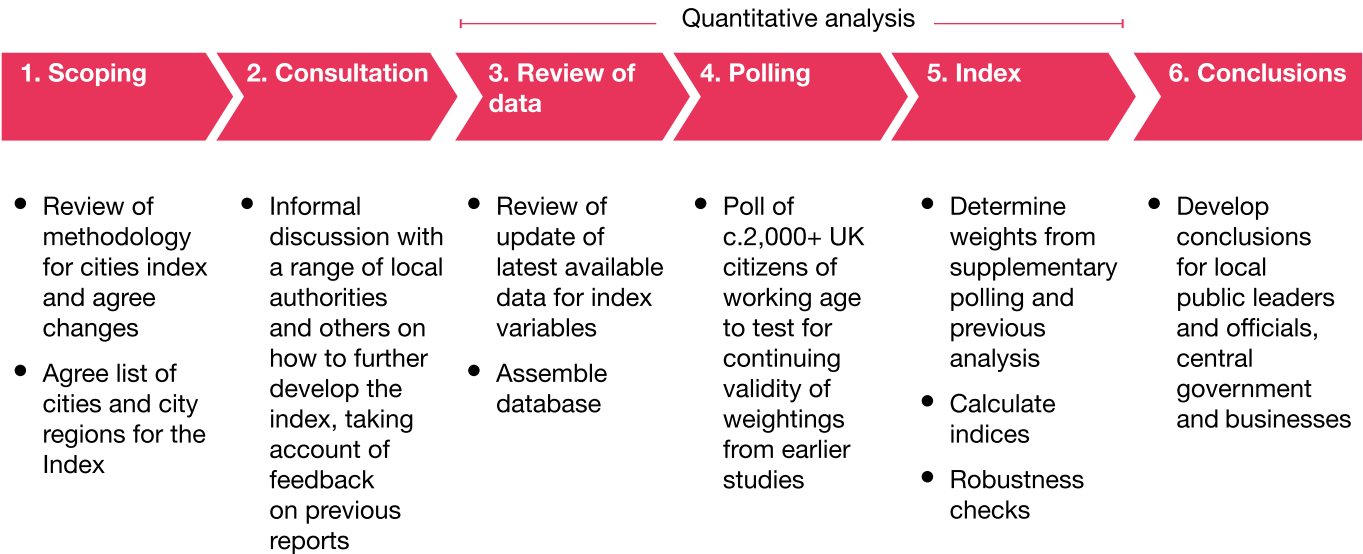


Table A1: Index variables, geographical areas and weights

Category	Measure	Time period	Geography	Weight
Safety	Violence against the person, weapons and drugs offences	2017-2020	LA	14%
Income distribution	Ratio of median to mean income	2017-2020	LA	14%
Income	GDHI per head scaled by regional price indices	2017-2020	LA	13%
Health	Life expectancy	2017-2020	LA	10%
Work-life balance	% in employment working more than 45 hrs per week	2017-2020	LA	10%
Environment	Carbon emissions: gCO2/£ GVA	2017-2020	LA	10%
Transport	Average commuting time to work	2017-2020	LA	8%
Jobs	Unemployment rate	2017-2020	LA/TTWA	8%
High street & Shops	Stores openings & closures	2017-2020	LA	5%
Housing	Housing price to earnings ratio and owner occupation rate	2017-2020	LA	4%
Skills	Share of population, aged 16-24 & 25-64, with NVQ 3+	2017-2020	LA	2%
New businesses	New businesses per head of population	2017-2020	LA	2%

Measure refresh: Health

With health remaining an important indicator, in this iteration of the Index, the health metric has been updated from the proportion of the workforce not working due to long-term sickness, to the more widely used life expectancy at birth. This has resulted in a re-ranking of cities in terms of health outcomes in the Index, but ultimately represents a better measure of health outcomes, with life expectancy being linked to living standards, lifestyle and health services¹⁹.

Constructing the Index

The scores for each city are given relative to a base period of 2017-19 (i.e. a score of zero means that a city's Index score in 2018-20 is equal to the 2017-19 average score for all UK cities in the Index). For each element of the Index, a city receives a score equivalent to the number of standard deviations it is away from the mean score on that indicator for all cities. As a result, a score of +0.2 means a city performs 0.2 standard deviations better than the sample mean for that element of the Index in the base year. The scores for each element are then weighted and summed to create the overall Good Growth Index score for that city. The approach is the same for the analysis of different geographies, such as those covered by Combined Authorities. This is the same approach that we have taken in previous reports and is standard practice when constructing such indices.

¹⁹ <https://data.oecd.org/healthstat/life-expectancy-at-birth.htm>

Our list of cities

Alongside refreshing our Index this year with new public priorities, we have also refreshed our framework of how we decide which cities we include or exclude from our analysis. Our refreshed decision criteria is outlined below.

- **Population size:** all cities contain 350,000 or more people, based on 2019 population data²⁰.
- **Mix:** one of the most important criteria for any city list is to ensure there is a mix of economies in order to provide interesting good growth comparisons.

- **Spread:** we ensure we have a good geographical spread, including cities in the devolved nations.

The use of this new methodology has meant that the total list of cities in our index has increased from 42 to 50 cities²¹. The full list of cities included in this year's Index is set out in **Table A2** below. It is important to note, the use of our new framework has led two cities from last year's Index, Doncaster and Birkenhead, to be excluded.

Table A2: All 50 cities included in our index). *indicates new entry

City	City	City	City	City
1 London	11 Nottingham	21 Medway	31 Middlesbrough and Stockton	41 Ipswich*
2 Manchester	12 Leeds	22 Southend	32 Exeter*	42 Huddersfield*
3 Birmingham	13 Warrington and Wigan	23 Reading	33 Derby	43 Lincoln*
4 Glasgow	14 Cardiff	24 Oxford	34 Preston	44 Peterborough*
5 Newcastle	15 Wolverhampton and Walsall	25 Portsmouth	35 High Wycombe and Aylesbury	45 Bournemouth*
6 Liverpool	16 Luton*	26 Bradford	36 Swansea	46 Plymouth
7 Leicester	17 Cambridge	27 Stoke-on-Trent	37 Aberdeen	47 Wakefield and Castleford
8 Belfast	18 Edinburgh	28 Hull	38 Swindon	48 York*
9 Sheffield	19 Southampton	29 Chelmsford*	39 Sunderland	49 Brighton
10 Bristol	20 Coventry	30 Norwich*	40 Milton Keynes	50 Northampton*

²⁰ Based on mid-2019 Small Area Population Estimates

²¹ We engaged the ONS to understand what the proportion of each local authority was in each TTWA in June 2021. Source: ONS (2021), "Listing of 2021 UK local authorities by component 2011 travel to work areas based on mid-2019 Small Area Population Estimates"

Cities included in the Demos-PwC Good Growth Index (defined as TTWAs).

A full list of local authorities covered in the TTWA definitions is available on our website.

We also apply the Good Growth Index methodology to:

- **10 Combined Authorities:** Cambridgeshire and Peterborough, Greater Manchester, Liverpool City Region, North of Tyne, North East, Sheffield City Region, Tees Valley, West of England, West Midlands and West Yorkshire. We also look at the performance of six city regions in Wales and Scotland, including Aberdeen City Region, Edinburgh City Region, Inverness City Region, Glasgow City Region, Cardiff Capital Region and Swansea City Region.
- All 38 Local Enterprise Partnerships (LEPs) areas in England

Economic impact analysis methodology

Our economic analysis assesses the economic growth rates of cities in our Index. We have predicted the economic impacts based on Gross Value Added (GVA).

The core modelling we have used to determine GVA impacts at a city level is the application of nation-wide sectoral impacts to each city's local authorities. Using the latest data available at the time of writing from the ONS, we have applied the sectoral impacts and forecasts to all local authorities in the UK, to understand and predict the economic growth rate of each city. We have used our [UK Economic Outlook: December 2021](#) sectoral forecasts under the 'Accelerated Growth' scenario to the [ONS 2019 Regional GVA by industry figures](#) from 2020 to 2021. Based on the proportion of each city's industry relative to the entire UK economy, we applied the sector impacts to each local authority from 2019 and mapped these to the cities included in the Good Growth Index.

Additionally, we have used other measures as proxies to further refine our economic analysis. This includes the Google Mobility Index, the Universal Claimant count and the case rate of COVID-19 at local authority levels in the UK.

We have weighted each proxy in order to account for all proxies, but have more strongly weighted proxies that we feel are the most accurate measures of GVA. In this instance, we have weighted the sectoral analysis as the most accurate measure of GVA at the city level.



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Subject:	Community Planning update: Belfast Agenda Review, City Development & Jobs, Skills and Education Board Boards
Date:	06 April 2022
Reporting Officer:	Cathy Reynolds, Director City Regeneration & Development John Greer, Director of Place and Economy
Contact Officer:	Kevin Heaney, Portfolio Manager Jamie Uprichard, Business Research and Development Manager

Restricted Reports	
Is this report restricted?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If Yes, when will the report become unrestricted?	
After Committee Decision	<input type="checkbox"/>
After Council Decision	<input type="checkbox"/>
Some time in the future	<input type="checkbox"/>
Never	<input type="checkbox"/>

Call-in	
Is the decision eligible for Call-in?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

1.0	Purpose of Report or Summary of main Issues
1.1	The purpose of the report is to provide Members with an update on the progress of the Belfast Agenda Review, including the action planning phase, with a specific focus on the work being taken forward by the City Development and Jobs, Skills and Education delivery Boards.
2.0	Recommendations
2.1	The Committee is asked to:

	<ul style="list-style-type: none"> i. Note that a report was presented to the March SP&R Committee outlining the progress of the development of the refreshed Belfast Agenda Strategy document and supporting four-year Delivery Action Plans. ii. Note the progress for the City Development and Jobs, Skills and Education Boards as set out in this report. iii. Consider and provide comments on the emerging strategic intents and measures of success (stretch goals) as set out in slides 12-22 in Appendix 1. iv. Note the proposed next steps and timeline as set out in slide 33 in Appendix 1. v. Note the plans for continued elected member engagement, detailed in section 3.5.
3.0	Main report
3.1	<p>Members will be aware of the <i>Belfast Agenda: Continuing the Conversation</i> engagement that commenced in June 2021 to inform the refreshed Belfast Agenda for the period 2022-26. During this engagement there was broad agreement that the existing long-term vision and outcomes of the Belfast Agenda remain relevant, and the proposed priorities of focus were the things that stakeholders and communities believed community planning could help address over the next 4-year period. As a result of feedback received some minor changes have been made to the framing of priority areas such as changing 'Economic Recovery' to 'Sustainable & Inclusive Economic Growth' and the creation of a specific priority for City Development. A summary of the current Belfast Agenda priority framework is attached at Appendix 1</p>
3.2	<p><u>Bringing focus and commitment to delivery</u></p> <p>Members will recall that in order to ensure that the vision and ambitions set out within the Belfast Agenda translates into delivery, four cross-sectoral Boards have been formed (City Development Jobs, Skills and Education Living Here Resilience and Sustainability) under the auspices of the Community Planning Partnership.</p>
3.3	<p>Building on the recommendations and consensus reached through Phase 1, the Community Planning Partnership, Delivery Boards and Council have committed to co-design specific and measurable action plans which underpin the priority areas of focus. This has been the focus of each of the respective delivery boards, who have designated small groups of core partners to develop the co-design approach for each priority area. This has involved analysing the range of outputs from the phase 1 engagement process; assessing relevant strategies, plans and local intelligence; feedback from community focus groups & surveys; feedback from Delivery Board workshops and legacy actions contained within previous action plans.</p>

3.4	<p>Based on this initial analysis, partners prepared a strategic framework to help bring focus to the emerging co-designed action plans consisting of:</p> <ol style="list-style-type: none"> 1. What are we trying to achieve over the next 4 years (strategic intent) 2. How will we measure success (stretch goals); and 3. How will we realise such success (SMART Action Plan(s)). <p>Sections 3.3 & 3.4 outlines how a structured and informed approach is being taken forward with respect to the City Development Board & Jobs, Skills & Education Board priority areas, ambitions, measures of success and importantly the focus for collaborative action.</p>
3.5	<p>City Development Update</p> <p>Members will recall that in January 2022, an update was presented on the City Development Board workshop which took place in November 2021. Since the workshop, significant work has been undertaken with partners to co-design action plans. Some specific points we would highlight for Members include:</p>
3.6	<p><u>Housing-Led Regeneration</u></p> <p>A Housing-Led Regeneration Group, chaired by the NIHE Chief Executive with representation from BCC, DfC, and LPS has been established to drive forward collaborative action through community planning. The following draft strategic intents have been defined:</p> <ol style="list-style-type: none"> 1. Increase housing supply across all tenures in the Belfast City Council area (including a strategic sites assessment exercise of all public sector assets). 2. Increase the city centre residential population 3. Address dereliction in local areas 4. Adopt a placeshaping approach to local development 5. Identify housing stock which requires retrofit to reduce fuel poverty and improve energy efficiency
3.7	<p><u>Connectivity, Active and Sustainable Travel</u></p> <p>Work is underway with partners from DfI, Translink, Sustrans, Council and community partners to establish the right mechanism to deliver on this priority. The following draft strategic intents have been defined:</p> <ol style="list-style-type: none"> 1. Reduce private car use to improve individual, community, environmental and economic well-being

<p>3.8</p>	<p>2. Enable connections to and from the city centre, enhancing permeability with neighbourhoods by improving active travel and sustainable travel routes across Belfast</p> <p><u>City Regeneration and Investment</u></p> <p>Work is underway with partners from SIB, Council, the private sector and community representatives to establish the right mechanism to deliver on the City Regeneration and Investment priority with recognition that this priority must have citywide impact. To date, the following draft strategic intents have been defined:</p> <ol style="list-style-type: none"> 1. Working collaboratively to maximise social, environmental and economic benefits of citywide regeneration schemes 2. Working collaboratively to unlock barriers to driving forward major regeneration schemes 3. Working in partnership to address dereliction and maximise placemaking and regeneration opportunities across the city and neighbourhoods 4. To create a vibrant, thriving city centre which positions the city to compete 5. Developing opportunities in line with strengths to position the city to compete globally <p><u>Future City Centre Programme</u></p> <p>Members will also recall that in January 2022 it was agreed that a City Centre Delivery Group would be established to focus on the city centre. Particular areas of focus include regeneration, city centre living, connectivity, investment, vibrancy, cultural and tourism offering and digital innovation. On-going work is currently being undertaken via City & Neighbourhoods Services in relation to a Clean Green, Safe and Inclusive Action Plan based on a multi-agency approach. Discussions are underway with various partners to bring focus to the Future City Centre priority including accelerating some areas of work which have been identified in A Bolder Vision. To date, the following draft strategic intents have been identified:</p> <ol style="list-style-type: none"> 1. Drive the physical, cultural and tourism regeneration of the city centre 2. Create a thriving city core through diversifying and enhancing the city centre offer 3. To build the foundations and establish Belfast as a globally significant destination for innovation 4. Facilitate a clean, green, safe and inclusive city centre
<p>3.9</p>	

	<p>We will continue to work with partners and communities, including a recent City Development Board meeting held on 11 March 2022, to co-design delivery plans over the forthcoming weeks and months. This represents an ongoing and complex process, which requires participation and involvement across public and private sectors and communities at multiple levels, which has resulted in some priorities being more developed than others. It was also agreed at the recent meeting of the Board that there be VCSE / community representation on emerging sub structures. The emerging frameworks for each of the priorities are attached as part of the presentation attached at Appendix 1 (slides 12 to 22) which had been discussed with the All-Party Working group on Community Planning when it met on 23 February 2022. The strategic intents and stretch goals have subsequently been further developed, particularly the City Development elements following the Board meeting on Friday 11 March. This reflects the dynamic nature of the co-design process which remains a work in progress.</p>
3.10	<p>Jobs, Skills and Education Update</p> <p>The Jobs, Skills & Education Board met on 7th March 2022 and agreed on the following strategic framework for its three priority areas of focus, to be considered further at the next meeting of the Community Planning Partnership and through wider consultation and engagement.</p>
3.11	<p><u>Educational Inequalities</u></p> <p>Community planning partners have committed to ensuring that everyone in Belfast fulfils their potential, which means that upon leaving school young people will be supported into a positive destination of their choosing where they enjoy active participation in all areas of life. Educational attainment has a strong impact on individual wellbeing and the opportunities that people have to fulfil their potential. A specific task group comprised of community planning partners has been established to drive activity in this area, aligned with the Department of Education's A Fair Start Report & Action Plan.</p>
3.12	<p>Strategic Intent:</p> <ol style="list-style-type: none"> 1. Every child and young person is supported in their wellbeing and learning so that they develop the skills and capabilities to fulfil their potential and progress to a positive destination.
3.13	<p>Targets to be achieved by 2026:</p> <ul style="list-style-type: none"> • All schools, family and community place-based partnerships will devise and implement a whole community approach to the learning and development of children and young people; this will be evidenced in School Development Plans, relevant action plans and community partnership plans;

	<ul style="list-style-type: none"> • Increase the percentage of school leavers progressing into positive destinations from 93% to 96%; • Support children in their early years in disadvantaged areas in a seamless journey from antenatal, to pre-school, school and beyond; • Reduce the proportion of pupils with less than 85% attendance from 12% to 8%.
3.14	<p><u>Employability & Skills</u></p> <p>Having a good job is important to people in Belfast and is key to ensuring we deliver inclusive growth for all our residents. The labour market in Belfast is complex and changing and there are many challenges regarding the skill levels of the city's resident. In order to make Belfast a city where everyone benefits from a thriving and prosperous economy and fulfils their potential, it is imperative that we work collectively to increase skills attainment while also matching people and skills to opportunities. Within this context we have worked with the Department for Communities and community planning partners to establish a labour market partnership that will seek to achieve the following:</p>
3.15	<p>Strategic Intent:</p> <ol style="list-style-type: none"> 1. Quickly back to work – mitigate the economic impact of Covid-19 on the labour market by supporting those who have been or are at-risk of being made unemployed. 2. Increase opportunities – empower those furthest from the labour market to succeed and progress in employment. 3. No-one left behind – target disadvantaged groups through the delivery of an integrated, comprehensive, inclusive, holistic and local employability approach. 4. Catching-up – support access to careers paths, reskilling and upskilling for those who are out of work and those on low incomes.
3.16	<p>Targets to be achieved by 2026:</p> <ul style="list-style-type: none"> • Decrease the proportion of residents who are unemployed, yet actively seeking employment, to 1.5%. • Cut the proportion of working-age population with no qualifications to 12.0%. • Reduce the working-age economic inactivity rate (excluding students) within the city from a baseline of 23.5% to 18%. • Increase to the working-age population who have attained Level 4 or above qualifications to 56.0%.
3.17	<p>Sustainable & Inclusive Economic Growth:</p>

3.18	<p>A thriving and prosperous economy is the engine of change for our city and the critical contributor to all the outcomes that we wish to achieve. As the region's capital city, its major population centre and the hub for business and employment, Belfast is critical to Northern Ireland's economic future. Therefore, growing an inclusive and sustainable economy is one of our key priorities. Creating more and better jobs that are sustainable, rewarding, provide a career path and are financially rewarding has consistently been the major concern raised by residents and other stakeholders.</p> <p>As a city, Belfast faces a number of economic challenges which affect our ability to achieve sustainable and inclusive economic growth, some of these challenges are deep rooted structural issues, which have been further exacerbated through COVID-19. Some of our challenges include lagging productivity, low levels of business start-up, innovation and export and ongoing issues with economic inactivity and high rates of unemployment.</p> <p>The next iteration of the Belfast Agenda will be informed by an economic strategy which will support sustainable and inclusive growth for the period 2022-30. The strategy will clearly articulate the role of Belfast in the regional economy and will identify a series of key propositions to build on areas of competitive advantage in a rapidly changing global business context while ensuring that structural and environmental challenges are considered in order to drive sustainable and inclusive economic growth. A number of strategic intents, which are subject to further consultation, are outlined below and will inform the strategic intent, targets and actions for this priority area within the Belfast Agenda.</p> <p>Strategic Intents:</p> <ol style="list-style-type: none"> 1. Foster growth of indigenous businesses in Belfast by improving innovation, scale up, growth and survival rates in sectors aligned with Northern Ireland's vision for a 10x Economy 2. Create new and better jobs in the city by driving innovation and increasing value add of business activity 3. Build and maintain a skills pipeline that addresses the skills gaps of Belfast's current and future businesses, with clear pathways for employee growth and development into priority sectors 4. Improve socio-economic inclusion in the city by providing fair access to well paid jobs 5. Grow levels of exports and foreign direct investment in Belfast, supporting businesses to capitalise on Belfast's unique geographical opportunities
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3.19	<p>6. Establish Belfast as a vibrant place to invest, live, work and play and attract a diverse and skilled workforce for the future</p> <p>7. Establish Belfast as a resilient, net-zero, circular economy and deliver business opportunities in green technology such as green hydrogen.</p> <p>Targets to be achieved by 2026:</p> <p>While targets are still to be agreed through the progression of the economic strategy, some initial thoughts for further consideration include the following:</p> <ul style="list-style-type: none"> • Increase the number of new business start-ups and the survival rates of existing businesses • Increase the number of businesses in the city who are exporting and undertaking R&D activity • Decrease the proportion of residents who are unemployed, yet actively seeking employment, to xxx • Achieve an x% increase in our overall Inclusive Growth score (will depend on what framework we decide to go with) • Increase the GVA growth rate for Belfast and the surrounding region • Grow economic participation within priority sectors • Increase productivity of businesses and employees across sectors, focusing on skills required in priority sectors • Maintain improvements in 'quality of life' indices to maintain attractiveness of the city for current and future population • Reduce traffic congestion and improve transport links to areas of the city with potential for future growth
3.20	<p>It is proposed that the timeline for developing the refreshed Belfast Agenda strategy document and underpinning delivery plans includes sufficient time for direct and genuine engagement with partners, communities/ communities of interest and specific sectors including the business and private sector over April and May 2022. In addition, more formal and intensive consultation activities are planned on the strategy document as well as further engagement to co-design the action plans during May and June 2022. Slide 33 in Appendix 1 outlines the proposed next steps and timeline for this process. It is felt that the timeline will allow for greater input and enable valuable buy-in to the emerging plans.</p>
3.21	<p><u>Political engagement with elected members</u></p> <p>It is intended that regular updates will be brought to future meetings of Committee for consideration and input. The intention would be to bring a further iteration of the draft strategy</p>

	and emerging action plans to Committee in May 2022 for further consideration, input, and refinement.
3.22	Members are asked to consider and provide feedback on the emerging frameworks outlined by 20 April 2022 to communityplanning@belfastcity.gov.uk . This feedback will then be reflected in future iterations and can be discussed further with members as the strategy is further refined.
3.23	<u>Financial & Resource Implications</u>
	Any financial implications arising from this report will be covered from existing budgets. The review process will continue to involve the participation of all community planning partners, who will need to commit their resources to the review process and the agreed action plans.
3.24	<u>Equality or Good Relations Implications / Rural Needs Assessment</u>
	It is recommended that the consultation and engagement activities to review the Belfast Agenda will take account of the draft Audit of Inequalities and include specific sessions with targeted harder to reach groups to ensure that equality implications are considered as part of the review process.
4.0	Appendices - Documents Attached
	Appendix 1 Belfast Agenda Review Overview including emerging Action Planning Frameworks for agreed priorities (updated 3 rd March 2022)

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All-Party Working Group on Community Planning

Continuing the Conversation to Review the Belfast Agenda


23rd February 2022 (Updated 3rd March 2022)

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Belfast will be a city re-imagined and resurgent. A great place to live and work for everyone. Beautiful, well connected and culturally vibrant, it will be a sustainable city shared and loved by all its citizens, free from the legacy of conflict. A compassionate city offering opportunities for everyone. A confident and successful city energising a dynamic and prosperous city region. A magnet for talent and business and admired around the world. A city people dream to visit.

Outcomes to 2035

- Everyone in Belfast benefits from a thriving and prosperous economy
- Everyone in Belfast fulfils their potential
- Belfast is a welcoming, safe, fair and inclusive city for all
- Everyone in Belfast experiences good health and wellbeing
- Belfast is a vibrant, attractive, connected and environmentally sustainable city

Priority themes 2022-2026

- Economic recovery
- Employability and skills
- Housing
- Health inequalities
- Climate, resilience and sustainability
- Active and sustainable travel
- Educational attainment
- Community recovery and neighbourhood regeneration

Cross-cutting themes

- Inclusive growth
- Children and young people
- Good relations and shared future
- Older people

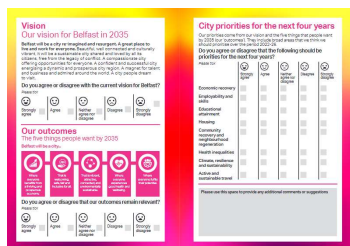
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Phase 1: Engagement & Co-design



- 6 participatory workshops
- 130 participants from 63 organisations
- Board workshops / Online platform / social media/ 435 survey responses (online and paper based)
- Utilising local assets (libraries and community centres)



Target Audience

1	South Belfast Stakeholders
2	Elected Members
3	North Belfast Stakeholders
4	West Belfast Stakeholders
5	East Belfast Stakeholders
6	Communities of Interest

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We Asked, You Said, We Did...



Participants discussed the need for targets and indicators in order to measure progress against the priorities.



Participants broadly agreed that what economic recovery meant needed to be more accurately defined... focus should be on how inclusive it would be, and how economic inequalities across the city would be addressed.



Participants felt that this was a central and urgent issue that connected to all the other priority themes.

- Agreement that long term vision and outcomes are still relevant
- Public engagement, outcomes, accountability and measuring success emphasized as part of the action planning process
- City Development included as an additional priority area; Connectivity added to Active and Sustainable Travel
- Economic Recovery refocused as **Sustainable and Inclusive Economic Growth**
- Focus being given to interrelated or cross-cutting actions to avoid creation of silos

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What do the priorities mean for your community? E.g.

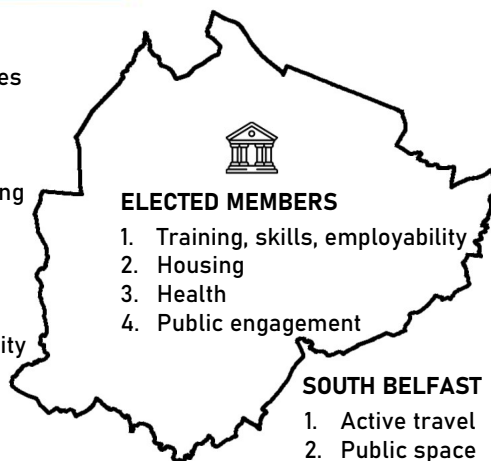


NORTH BELFAST

1. Access to services
2. Regeneration
3. Mental health
4. Housing
5. Health & Wellbeing

WEST BELFAST

1. Housing
2. Implementation
3. Outcomes and accountability
4. Public engagement
5. Poverty



ELECTED MEMBERS

1. Training, skills, employability
2. Housing
3. Health
4. Public engagement

SOUTH BELFAST

1. Active travel
2. Public space
3. Development, housing and regeneration

EAST BELFAST

1. Good relations/social cohesion
2. Public engagement
3. Implementation and outcomes
4. Health inequalities
5. Education, skills and employability

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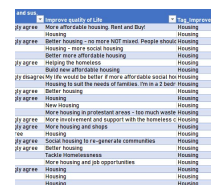
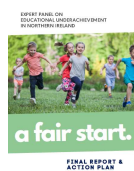
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Action Planning Process to date

Creating Alignment through to Delivery



- Convening leads identified to form small task and finish group for each priority
- Group tasked with consideration of **inputs** and preparing a starting point for the co-design process



For example: Education Authority, Department of Education and Belfast City Council officials have considered all inputs and drafted proposals based on wider engagement with Educational Inequalities subgroup (Belfast Area Partnerships, QUB, UU and CCMS)

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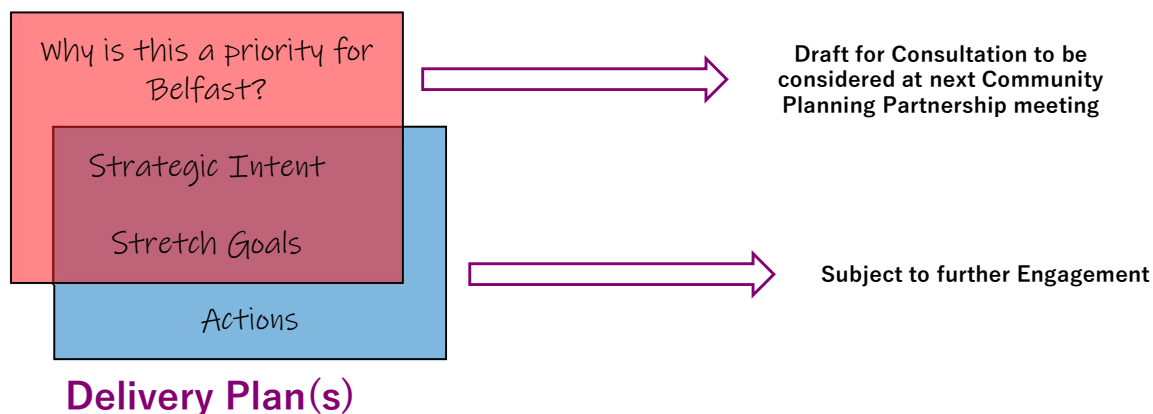
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Our Commitments and Milestones

Link between strategy document and delivery plans



Strategy Document (and Easy Read version)



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Action Planning Process to date

Ensure actions meet agreed guiding principles



✓ Adding clear value	We can achieve significant gains by collaborating across our partnership and sectors in a way we cannot through our existing single agency or thematic 'business as usual'.
✓ Impact for Belfast's people, place, economy	The work we deliver together will be felt in practical ways by individuals, families, communities, residents and businesses in Belfast, delivering tangible outcomes .
✓ With Belfast's Communities	The work we do will fully engage Belfast's residents, communities and businesses , building on their strengths and ensuring their voice is central to planning and delivery. We will work ' with and alongside ' our Communities, not 'To or For' them.
✓ Intelligence led priorities and action	We will focus our collaboration on the things that data, evidence and community insights tell us matter most to Belfast and we will deliver together in ways that evidence tells us will make a real difference .
✓ Resourcing	Delivery will require joint resourcing and effort, (i.e. staff time, services or investment). Should be a leadership commitment to jointly resource the initiative.

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8

Action Planning our Agreed Priorities

Creating Alignment through to Delivery



CLIMATE, RESILIENCE
& SUSTAINABILITY



CONNECTIVITY, SUSTAINABLE
& ACTIVE TRAVEL



HOUSING-LED
REGENERATION



HEALTH
INEQUALITIES



FUTURE CITY
CENTRE

Inclusive growth

Children and young people

Good relations and shared future

Older people



EDUCATIONAL
INEQUALITIES



EMPLOYABILITY &
SKILLS



SUSTAINABLE & INCLUSIVE
ECONOMIC GROWTH



COMMUNITY &
NEIGHBOURHOOD
REGENERATION



CITY REGENERATION
& INVESTMENT

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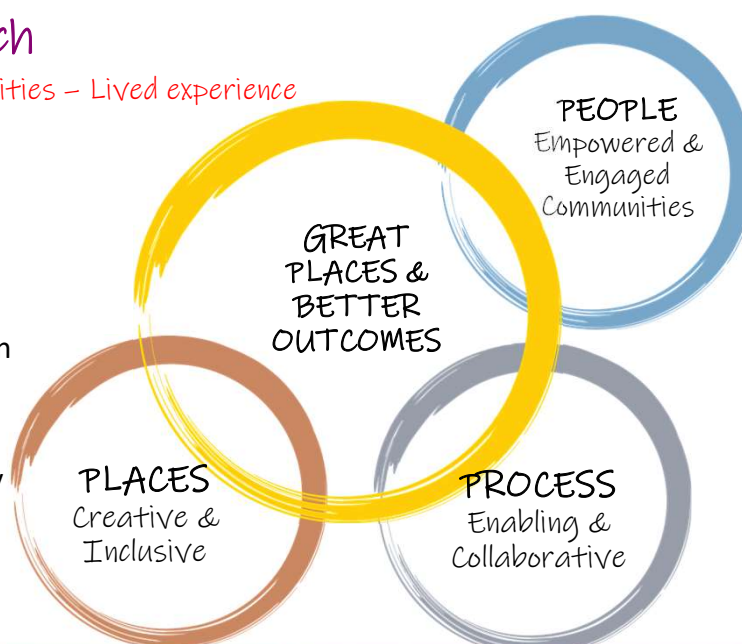
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BEYOND
STICKY
NOTES®

Co-Designed Approach

Ensuring delivering for communities – Lived experience

- Widen voices into the planning and prioritisation process.
- Localised engagement N|S|E|W - Phase 1 and Phase 2
- Increases ownership and connection
- Encourages active participation in solving local problems
- Stimulates innovation and creativity
- Build capability to support delivery.
- Multiple layers of engagement and participation



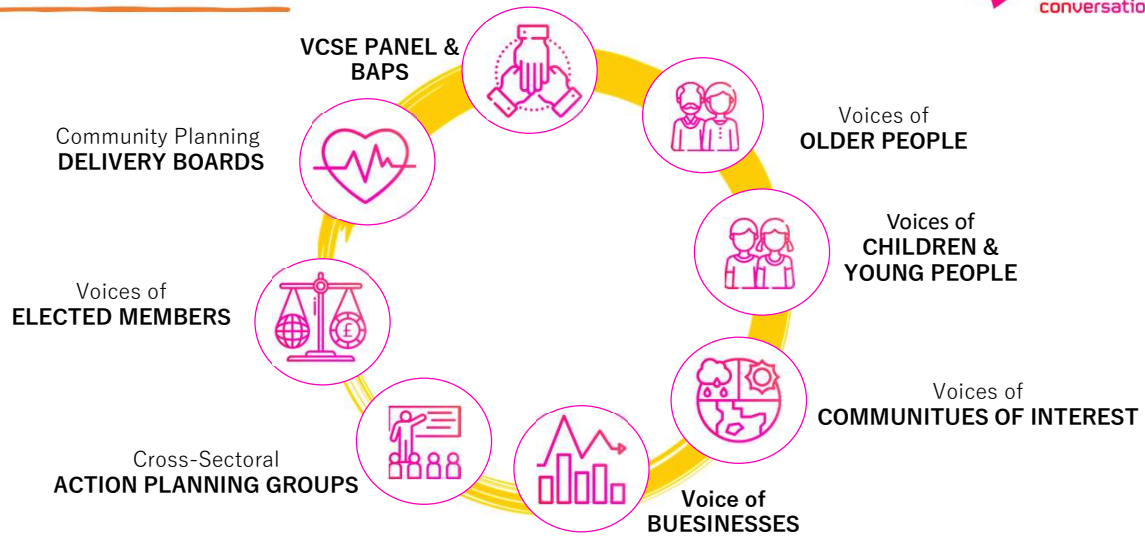
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10

Co-Designed Approach

Ensuring delivering for communities – Lived experience

The Belfast Agenda
continuing the conversation



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11

Emerging Draft Framework

Enabling the co-design action plans

The Belfast Agenda
continuing the conversation

WORK IN PROGRESS

PRIORITY



CLIMATE, RESILIENCE & SUSTAINABILITY

STRATEGIC INTENT

Support the people of Belfast to transition to an inclusive, zero-emissions, climate-resilient economy in a generation

STRETCH GOALS

Reduce carbon emissions (scope 1 and 2) by 66% (on 2000 levels)

Increase investment in the green economy by XX and created XX new jobs

XX homes will have adopted at least one energy efficiency measure

Increase the number of battery electric vehicles and hydrogen fuel cell vehicles in the public transport service.

Protect at least 1,770 homes and businesses from tidal and fluvial flood risk.

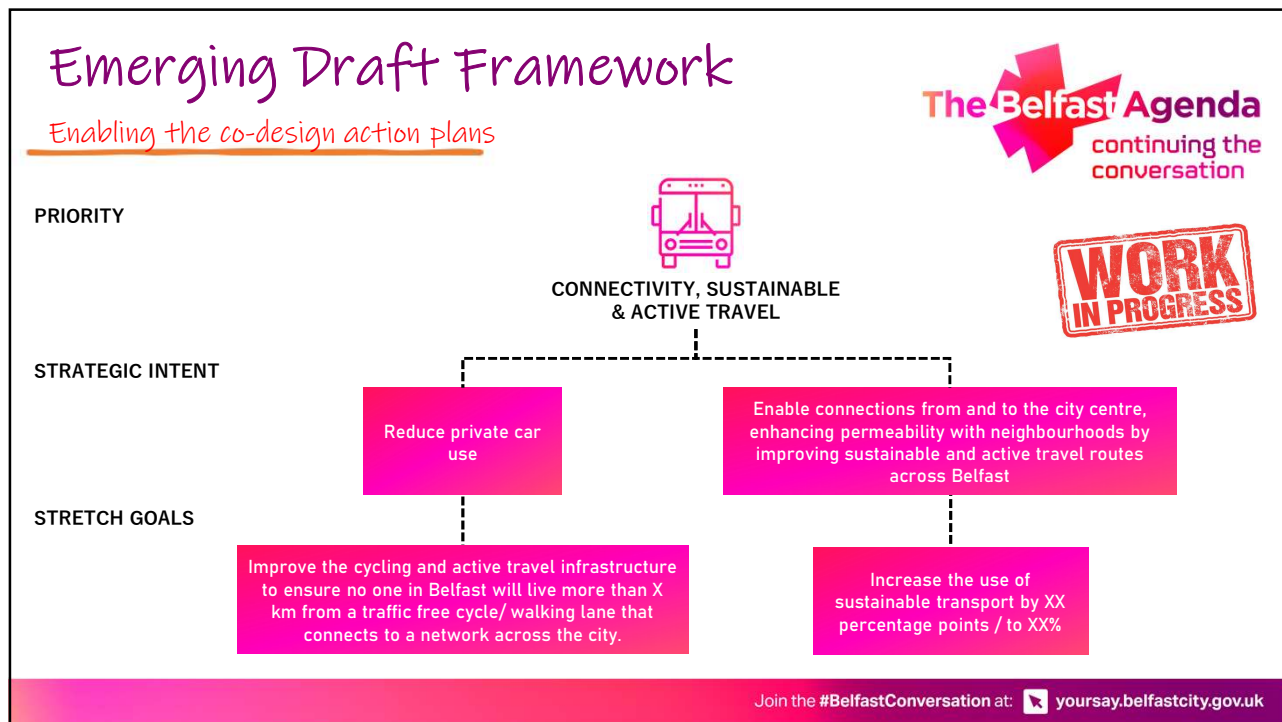
Plant 30,000 trees to improve air quality

Reduce residual waste sent to landfill

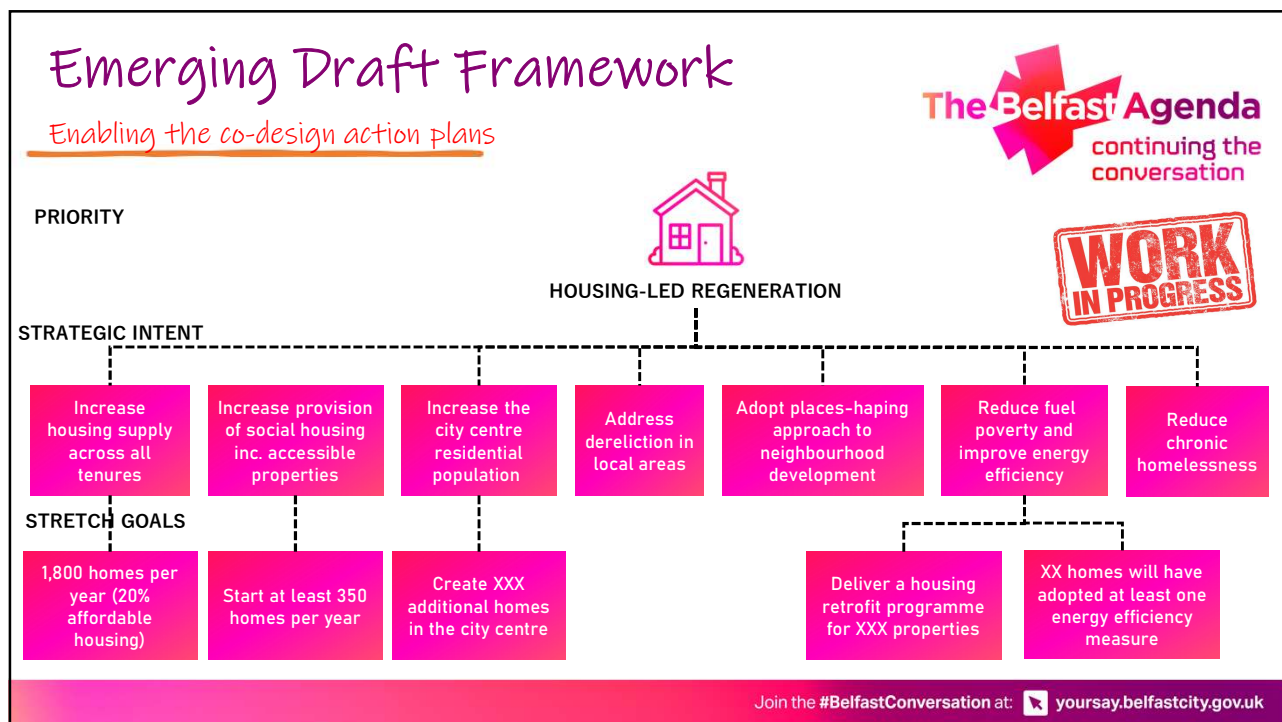
Note: The above framework is a starting point for the co-design process and should be considered a working draft as of 17/02/22

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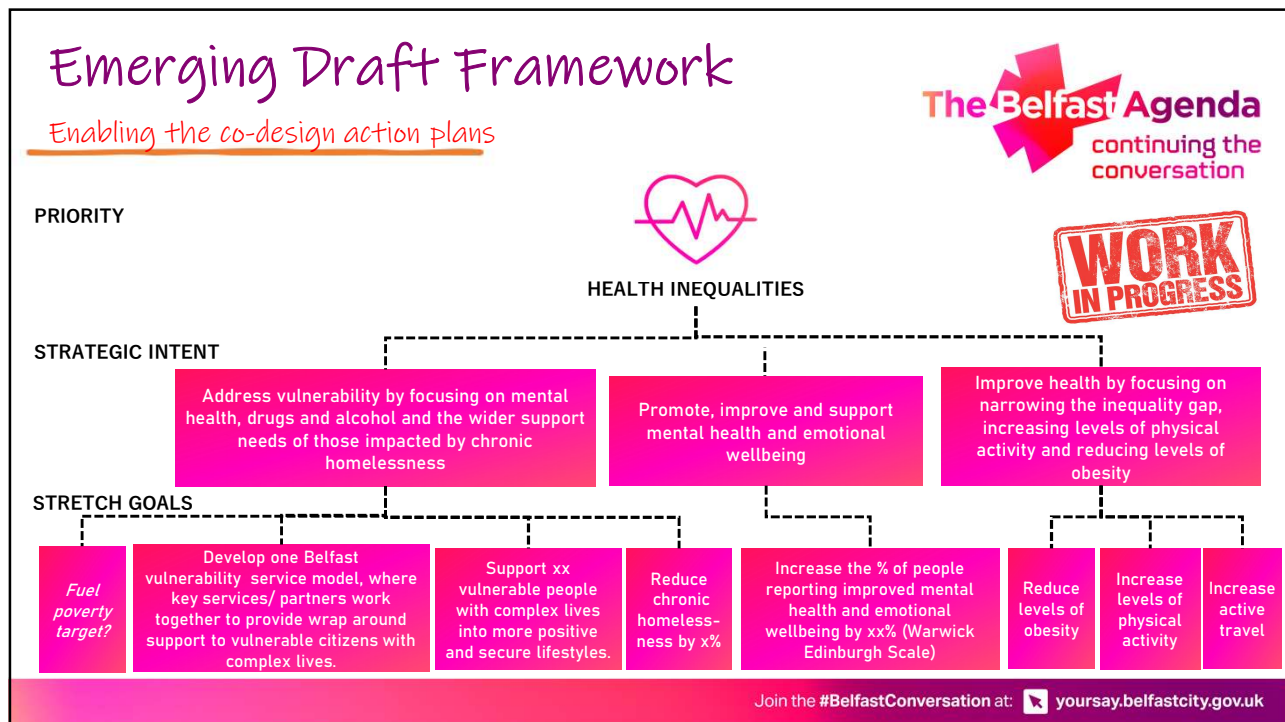
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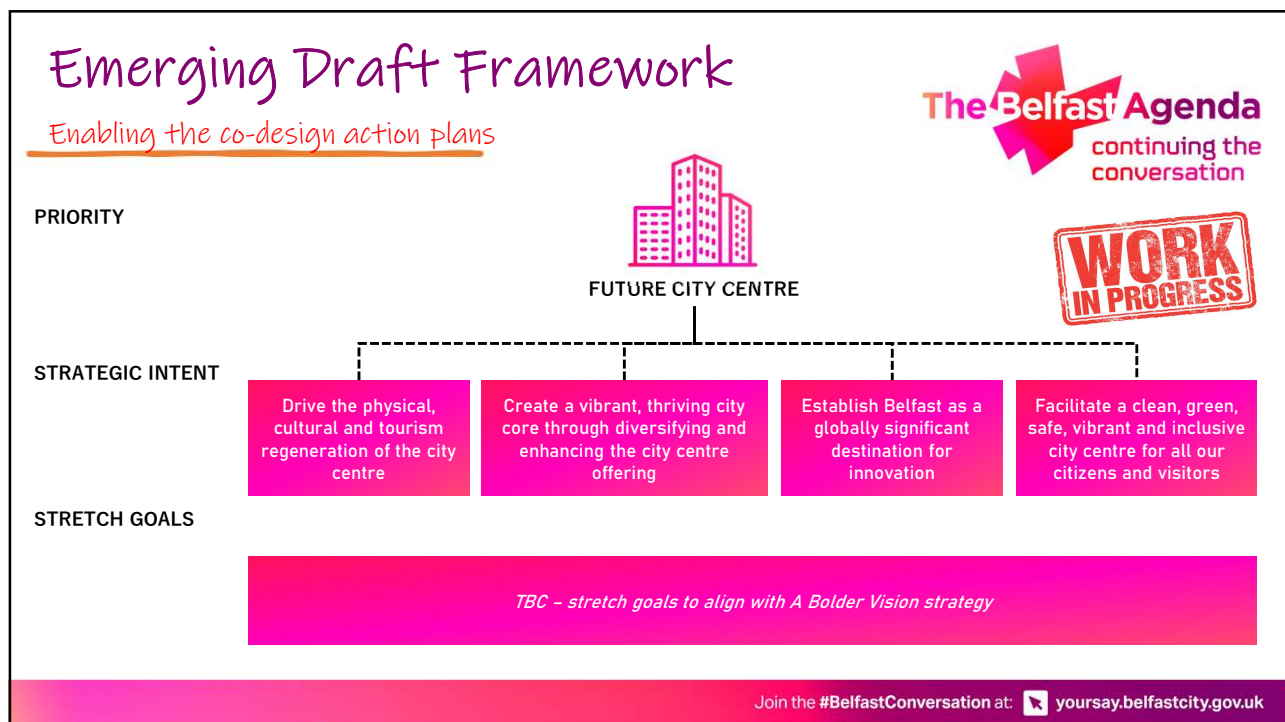
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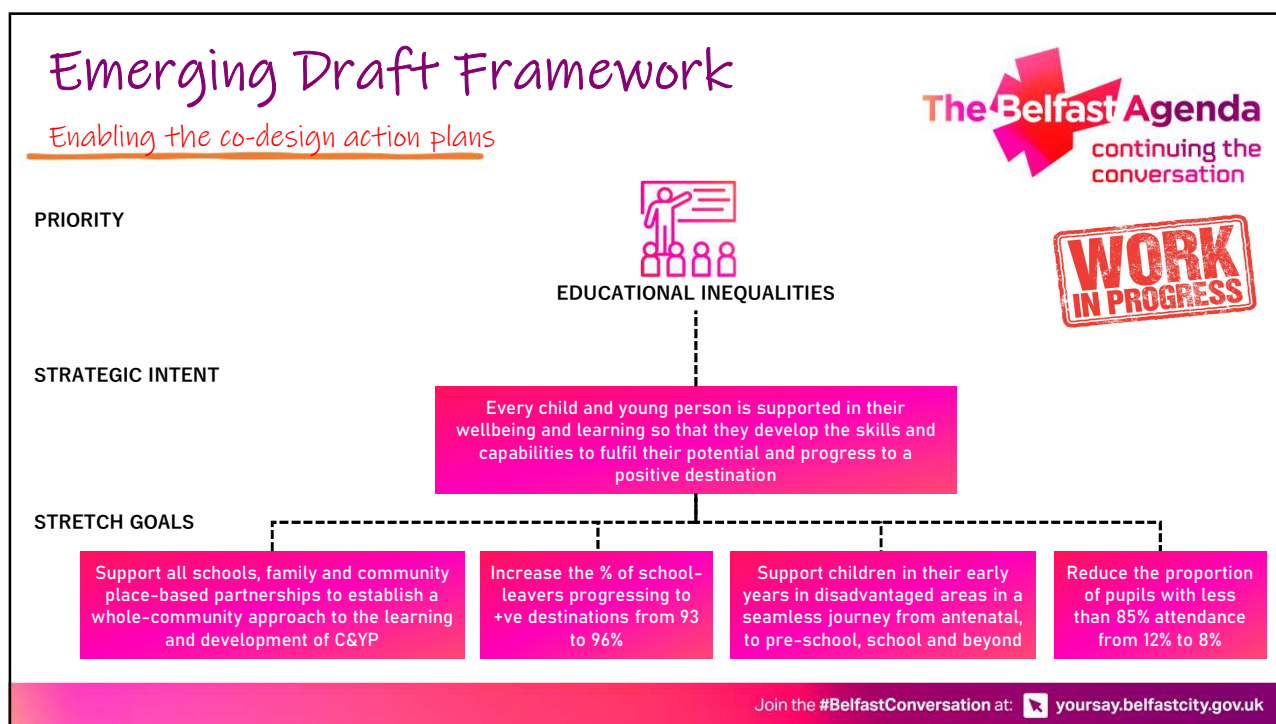
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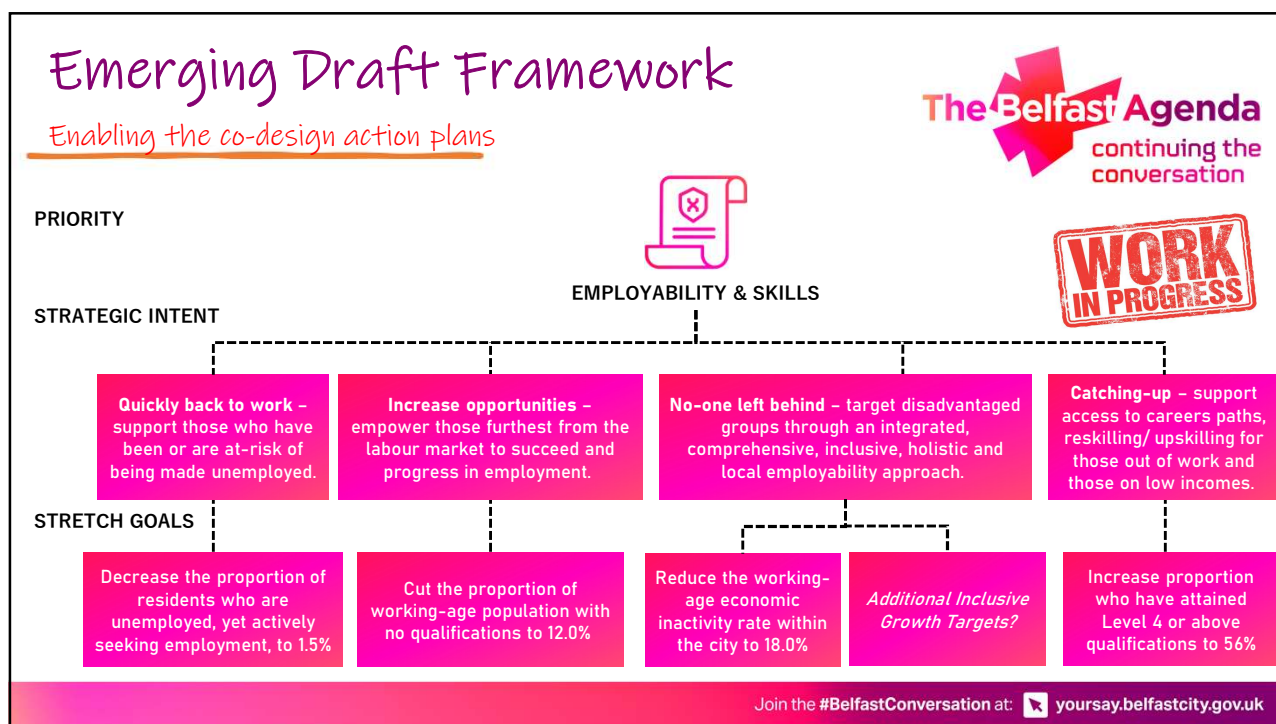
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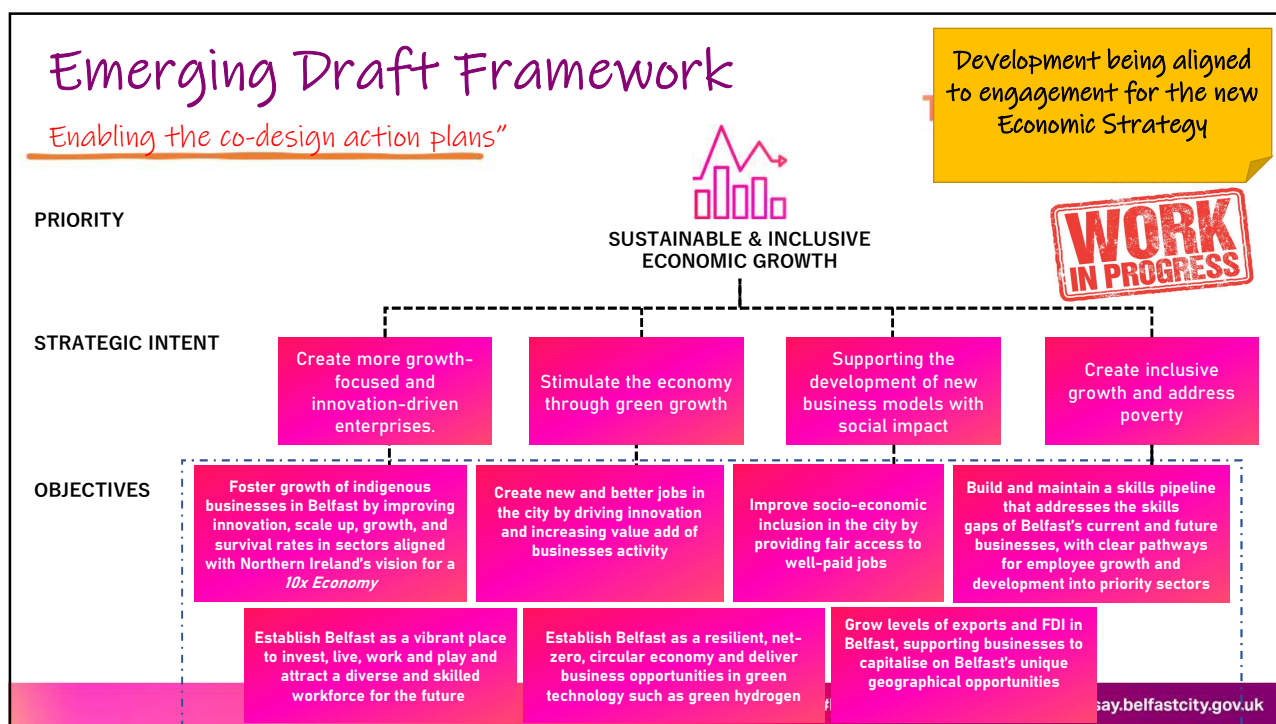
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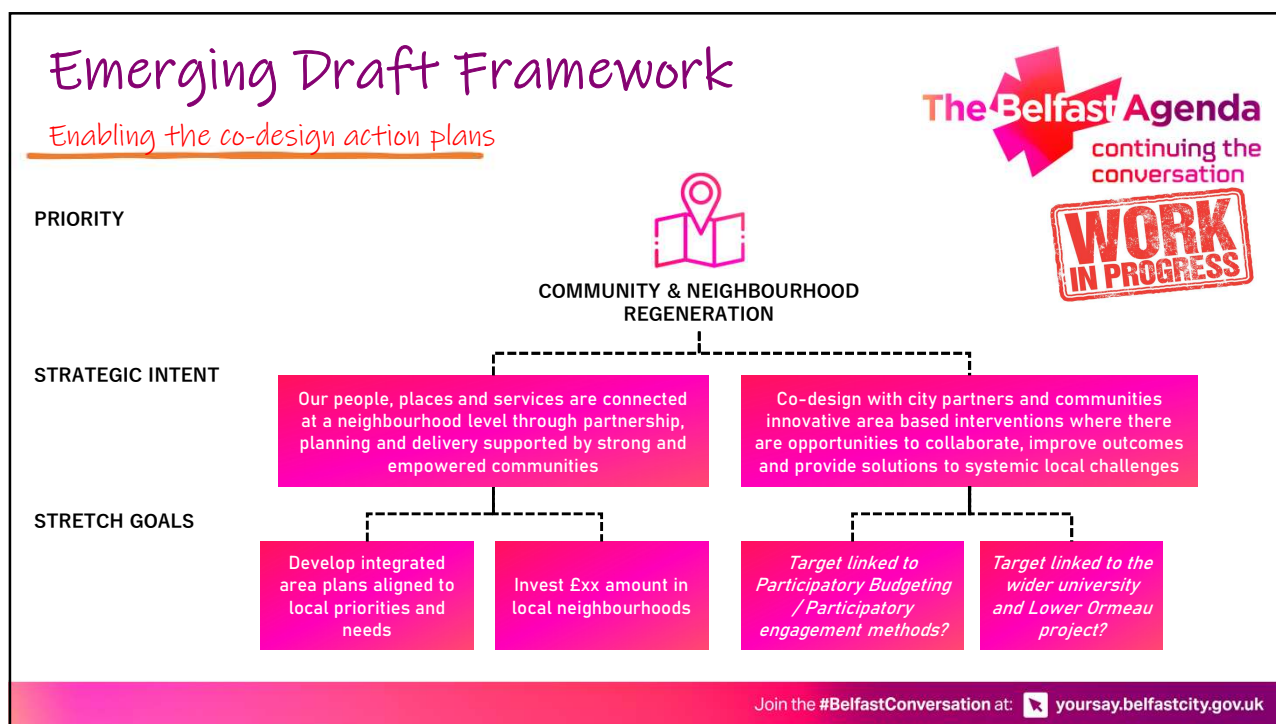
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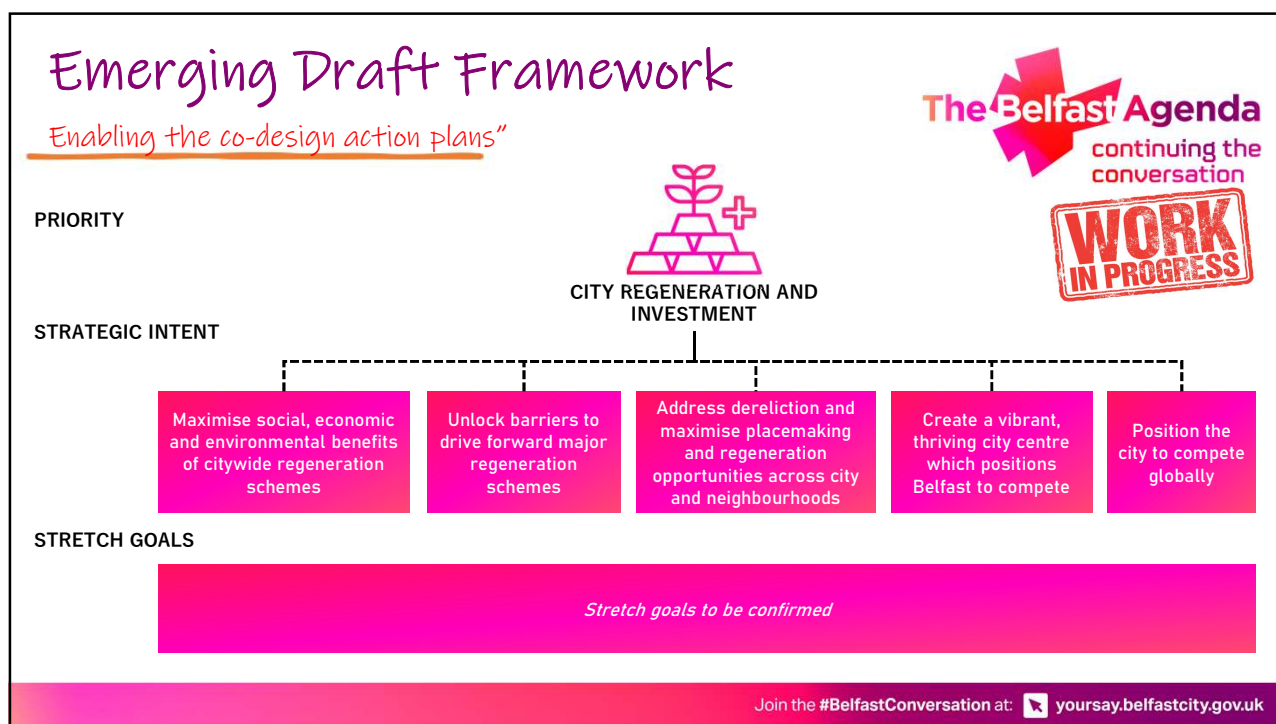
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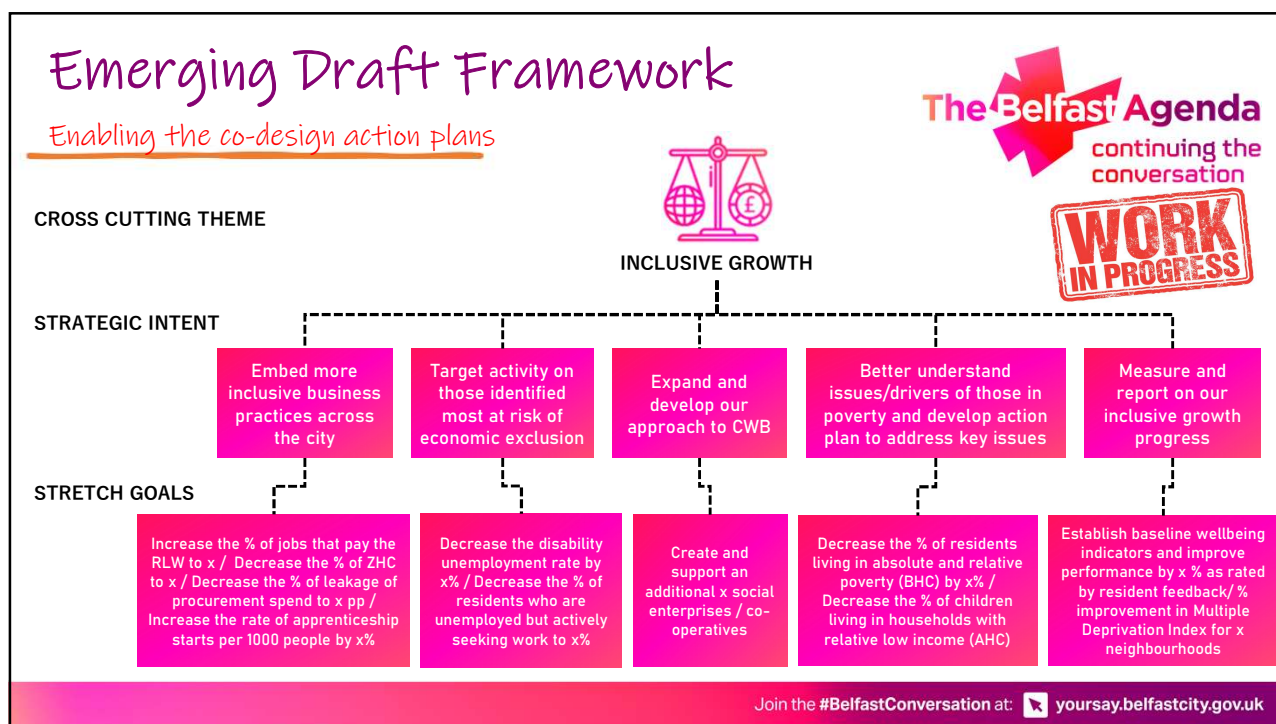
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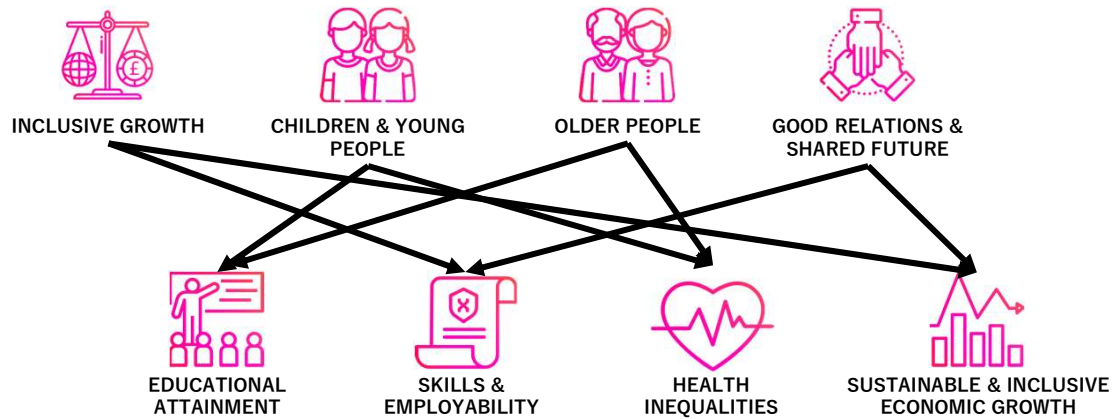


21



22

Cross Cutting Themes...



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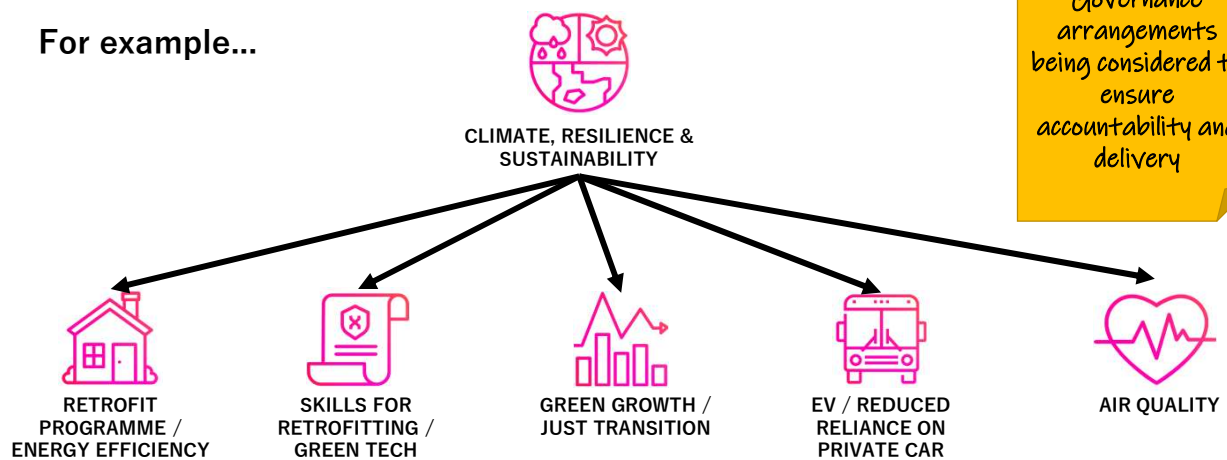
23

Priorities are also cross-cutting

Need further consideration to agree governance arrangements



For example...



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24

Belfast Agenda Refresh & Delivery Plan(s)

Example: Educational Inequalities



STRATEGIC INTENT	TARGETS / STRETCH GOALS	ACTIONS
Every young person is supported through their education journey to ensure that upon leaving education they progress into a destination	By 2026 we will increase the percentage of school-leavers progressing into positive destinations from 93 per cent to 96 per cent	1. Develop impactful interventions based on identified need that align with the regional 'Reducing Educational Disadvantage' Programme 2. Implement the most appropriate support mechanisms to enable boys to maximise educational outcomes, in keeping with A Fair Start Report
	By 2026 we will effectively support transitions for children and young people especially those identified as being at risk of underachievement – How can we measure impact and make this a SMART target? (Surestart Hanen Measures and others within FairStart?)	3. Maximise the proportion of children ready to start school through a range of support programmes for children aged 4 and younger and their parents 4. Support young people 'at risk' as they transition through their learning journey 5. Pro-actively provide young people at risk of underachieving with supports to remove barriers to learning, and support them to see the benefits of education through physical and extra-curricular activities. [DN: Suggest merging or cross-referencing Actions 2, 5 and 8 together]
		7. Develop a collaborative community and school approach to support parental engagement and empowerment 8. Support a community approach to education as referenced in Fair Start by developing capacity, skills and expertise within the community [DN: Suggest merging or cross-referencing Actions 2, 5 and 8 together]
	By 2026 we will have supported 125 primary schools & 25 post-primary schools to deliver School Development Plan priorities that focus on developing parental and community engagement	9. Engage Area Learning Communities across this city and provide opportunities for citywide collaboration, sharing of best practice and learning

This is what we're seeking to co-design by mid April

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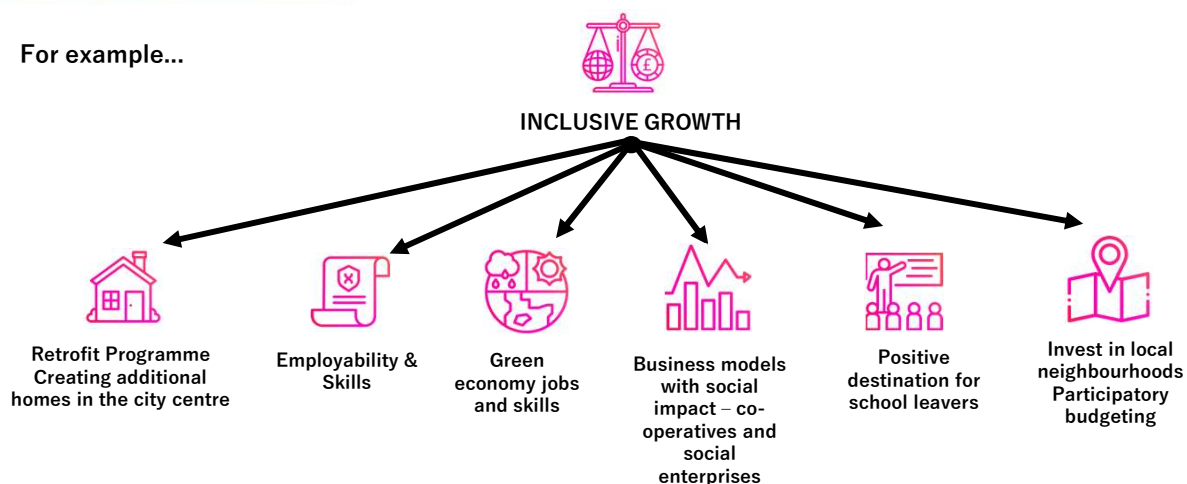
25

Cross-cutting themes: an inclusive growth lens

Need further consideration of governance arrangements and action planning



For example...



Note: The above framework is a starting point for the co-design process and should be considered a working draft as of 17/02/22

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26

Inclusive Growth: creating the right conditions

Working together...



Note: The above framework is a starting point for the co-design process and should be considered a working draft as of 17/02/22.

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27

Inclusive Growth

Illustrative Actions



Implement the Belfast Business Promise

- Seek all CPP members to sign up as Supporters with the aim of achieving Membership accreditation within 2 years.
- Additional 50 organisations signed up as Supporters by end of year 1
 - ✓ create more high-quality jobs,
 - ✓ lower levels of poverty,
 - ✓ build stronger healthier communities,
 - ✓ reduce inequality in the workplace and
 - ✓ work towards a more sustainable local economy.

Note: The above framework is a starting point for the co-design process and should be considered a working draft as of 17/02/22.

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28

Belfast Business Promise

Illustrative Actions



29

Inclusive Growth

Illustrative Actions



Implement Anchor Institution Commissioning & Procurement Group

Further define and focus on specific cohorts

Design & Implement Inclusive Growth Decision Making Framework

Establish business sector/advisory group

Support establishment of Poverty Truth Commission

Establish Inclusive Growth Oversight Group

Expand and develop our approach to Community Wealth Building

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30

Community Wealth Building



31

Population Indicators

Reviewed in line with the emerging stretch goals

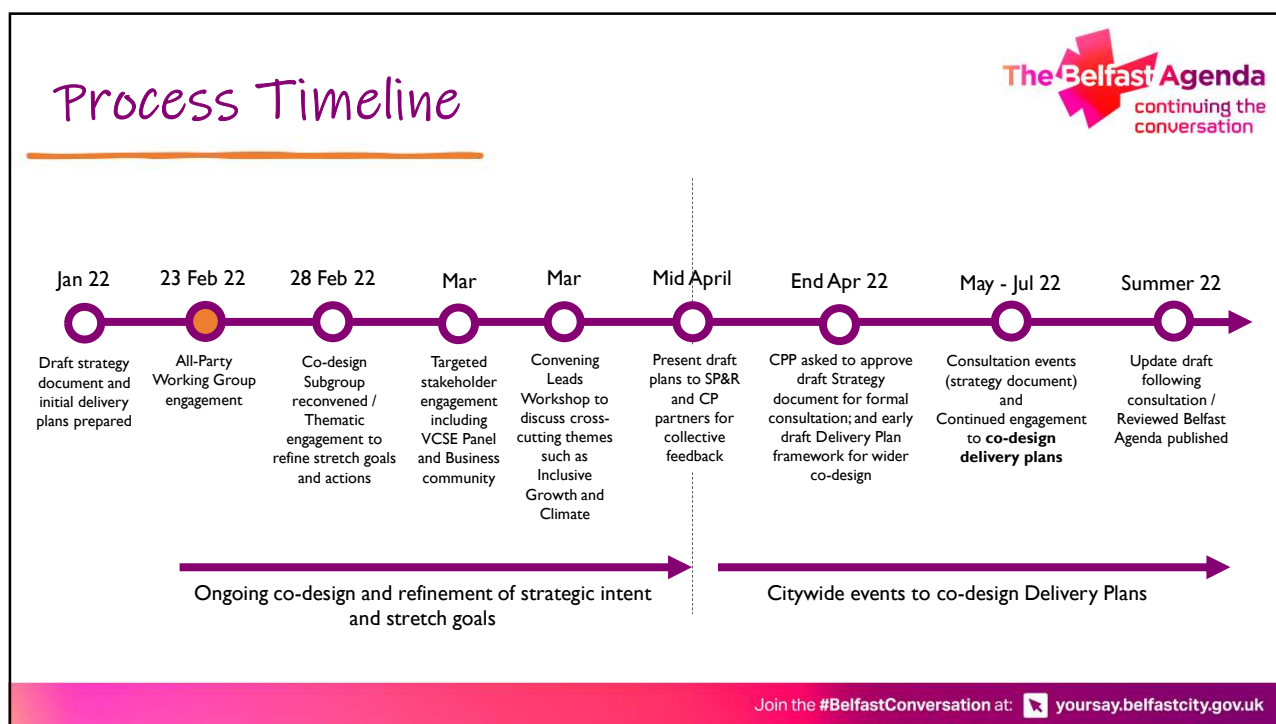


- Currently 51 indicators which measure the contribution towards our 5 outcomes over the long-term
- Framework currently being reviewed, ensuring it is consistent with the current priorities and emerging measures of success
 - Possible new indicators include carbon emissions, biodiversity, proportion of working age population with no qualifications, homelessness...
 - Technical Assessment Process (TAP) used by TEO for PfG also being applied to streamline the 'curves we want to turn'.



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32



33

For Discussion

- Are the emerging stretch goals the correct measures of success?
- Are they ambitious enough?
- Anything missing?
- Further engagement? Party Group Briefings?

The Belfast Agenda
continuing the conversation

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34

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Subject:	External Market Application – CQAF Bazaar
Date:	6 April 2022
Reporting Officer:	John Greer, Director of Economic Development
Contact Officer:	Clodagh Cassin, Markets Development Manager

Restricted Reports

Is this report restricted?

Yes

☐

No

☒

If Yes, when will the report become unrestricted?

After Committee Decision

After Council Decision

Some time in the future

Never

☐
☐
☐
☐

Call-in

Is the decision eligible for Call-in?

Yes

☒

No

☐

1.0	Purpose of Report or Summary of main Issues
1.1	<p>The purpose of the report is to:</p> <ul style="list-style-type: none"> Advise members of a request received to hold a market as part of the Cathedral Quarter Arts Festival (CQAF) on 2 May 2022 – the CQAF Bazaar Seek approval to grant the markets licence, in line with the Council's Markets Rights Policy.
2.0	Recommendations
2.1	<p>Members are asked to:</p> <ul style="list-style-type: none"> Agree to grant a market licence to the organisers (Firefox) to hold this one-off market as part of the CQAF Festival on Monday 2 May 2022 from 1-5pm.

3.0	Main report
3.1	Members will be aware that anyone wishing to operate a market or car boot sale within Belfast must apply to Belfast City Council for permission to do so. Depending on the scale and nature of the event, it may need authorisation from the City Growth and Regeneration Committee to take place.
3.2	An application of this scale has recently been received on behalf Firefox Events for a market to be held on the premises of the Common Market on 2 May 2022 as part of Cathedral Quarter Arts Festival. The market will involve up to 40 traders.
3.3	As part of our approval process for any market, as and a condition of granting a licence, officers request evidence of support from the landowner, consider the implications on adjacent properties and activities and ensure compliance with all relevant regulations and statutory requirements. In our view, the market is well placed in the Common Market space as it is spacious and can house at least forty vendors comfortably inside and out, it is airy and well ventilated and this supports efforts to reduce the spread of COVID-19.
3.4	All of the traders are local to Northern Ireland and are producing local and artisan products. The majority of the vendors who participate in the market are using sustainable production methods for their products for example beeswax candles and are promoting sustainable fashion through vintage pop ups. There is little to no waste produced on site and they operate a robust waste management recycling system. The pitch fees are fairly priced to enable local participation and encourage business to grow. The market will be complemented with local talent and musical performances throughout the event.
3.5	The organisers have strong working relationships with local businesses in the area and they are fully supportive of this market.
3.6	<u>Financial and Resource Implications</u> Licence fee and stall fee income from this event will be in the region of £250.
3.7	<u>Equality or Good Relations Implications/Rural Needs Assessment</u> There are no Equality and Good Relations considerations attached to this report.
4.0	Appendices – Documents attached
	None