Belfast City Centre

Regeneration Policy Framework

Final Report

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Executive Summary

Belfast is on the threshold of an exciting new era. Since the onset of the peace process market interest and demand, which had been pent-up for many years, is now being realised. This Framework provides the direction needed to guide and maximise the regeneration potential of this investment in the City Centre for the benefit of Belfast and the province as a whole.

The Framework takes cognisance of policy and guidance set down in the Regional Development Strategy and Regional Transportation Strategy. It also reflects the Government’s support for a significant retail led development scheme at Victoria Square.

Vision

It sets a high but attainable vision for Belfast, establishing it as a premier City for the 21st century. There are three core goals at the heart of this transformation:

- **creating** a vibrant City as a centre for learning, culture, retail, leisure and living;
- **improving** accessibility to the City Centre by all modes of transport; and
- **enhancing** the public realm.

Appraisal

An economic, social and physical appraisal draws on the wealth of studies completed, or which are currently underway, and guides the recommendations in this Framework.

- **Retail** – there is clear evidence that there is a scope for a considerable amount of additional retail floorspace in the City Centre. The issue is what form this should take, where it is best located, and its timing.

- **Office** - the overall office stock in Belfast is around 5.4m sq ft, although about 80% of this is secondary space. Demand has been traditionally driven by Government, and the financial and IT sectors and demand for new office space remains evident. The key issue is where this floorspace is best provided to attract investment, ensure rental growth and deliver regeneration.

- **Residential** – until recently there had been very little residential development in the City Centre but since the late 1990’s over 700 apartments have come on to the market. Whilst there is currently an oversupply in the City Centre there is long term potential for future residential development.

- **Tourism** – tourism currently represents a small proportion of GDP for the City, but research suggests that by 2015 there will be over 1.6 million visitors to Belfast each year. The implications of this are significant, and the City will need to boost its attractions and provide more accommodation to cater for demand.

- **Social** – the ‘troubles’ have stifled Belfast for many years and many of the challenges now facing the city stem from this prolonged unrest. The major issue is to ensure that those sections of the community in most need, benefit from new economic investment in the City Centre.
• **Physical** – although the basic street form is strong, and the City Centre benefits from a number of fine buildings, it is deficient in terms of the quality of its public realm and connectivity.

The Framework builds upon this economic, social and physical context and seeks to address the issues raised. The core principle is to regenerate the City Centre from its heart outwards, focusing on appropriate retail-led development. In order to achieve this five Guiding Themes and proposals for retail led development in four Action Areas – the four Quarters of the Shopping Core are identified.

**Guiding Themes**

• **Retail** - reinforcing the quantity and quality of shopping provision are imperative if Belfast is to re-emerge as the premier shopping destination. Mixing retail led development with leisure, residential and office uses is important in generating a 24-hour economy. The location of retail development is carefully considered and the Framework supports the Victoria Square Scheme along with complementary retail development in the North East Quarter of the Shopping Core, reflecting the significant regeneration benefits appropriate development in these locations will bring to the City as a whole.

• **Office** – the Framework emphasises the importance of the traditional City Centre office core to the south of City Hall, and directs DSD to focus on facilitating development of remaining sites in and around the office core and to take a lead role in ensuring appropriate quality development on the Grosvenor Road site, in addition to the completion of the Laganside Strategy. Further, there is potential for office uses as a component of mixed use development in the Northern gateway around York Street and Gamble Street.

• **Tourism and Leisure** – the Framework recommends targeting a quality anchor leisure development in the shopping core as a ‘footfall’ generator along with associated development. An emphasis is also placed upon reinforcing and improving the Great Victoria Street Corridor and kick-starting plans for the Cathedral Quarter, with particular emphasis on an iconic Arts Centre development.

• **Connectivity/Public Realm** - a number of key public realm improvement projects are considered to be of particular importance including Donegall Square, Royal Avenue/Donegall Place, High Street/Castle Place/Bridge Street, Fountain Street and Connections to Laganside.

• **Reinforcing City Communities** – the Framework builds on existing initiatives to harness City Centre opportunities to drive the regeneration of Belfast’s most disadvantaged communities.

**Action Areas**

• **South East Shopping Quarter including Victoria Square** – retail led mixed use development is supported in this quarter focused on Victoria Square as this will bring forward a substantial quantity, quality and diversity of retail floorspace. It will consolidate the main shopping area, creating a ‘dumbbell’ effect with CastleCourt and it will help to link the City core with Laganside.
• **North East Shopping Quarter, including Cathedral Quarter** – the intention for this quarter is to develop a reputation for culture and creative industries and as the City’s specialist retail area. This will be kick-started by a retail led development of appropriate form, scale, massing and density commensurate with the qualities of the area and an icon Arts Centre development in the heart of the Cathedral Quarter.

• **North West Shopping Quarter, including CastleCourt and North Street** – it is essential that this quarter is addressed comprehensively with wider regeneration in mind. The aspiration for this area is one of mixed use development, respecting the strong historic grain of streets and buildings and overall character of the area, whilst considering connectivity with the rest of the shopping core and the adjoining residential communities of North and West Belfast.

• **South West Shopping Quarter, including Fountain Street** – this area is relatively vibrant in its own right with a large number of lower market specialist shops and the Framework does not anticipate major retail led development in this Quarter in the medium term. The main focus for this area is on direct and quality investment in the public realm to safeguard the existing investment in the face of new retail developments elsewhere.

The role of implementing and delivering the regeneration of Belfast City Centre must be led by DSD within the context of BMAP. A more proactive approach is advocated for DSD in the context of this strategy, aimed at delivering appropriate, commercial office/residential led mixed use, as well as retail led development. DSD is encouraged to use its full armoury of powers and resources in setting strategy and directing investment.

The support for a retail led development in Victoria Square is established and this Framework also recommends a retail led development in the North East Shopping Quarter. Due to the potentially complementary and reinforcing nature of these two schemes this Framework recommends that DSD should assist appropriate retail proposals in the short to medium term. Retail development in other parts of the shopping core is not seen as a short to medium term priority.

This Framework promotes a mixed use strategy for the North West Shopping Quarter and recommends that a detailed regeneration strategy for this area is commissioned by DSD within the context of the emerging BMAP and BMTP.

The need to give impetus to the Cathedral Quarter is considered essential and a City Centre Art Centre would help kick-start this initiative.

Another priority for DSD is to secure the necessary urban design/public realm work for a number of critical interventions which will link retail developments, reinforce the existing shopping environment, link the shopping core to the river and will result in an internationally acclaimed space surrounding the City Hall.

Proactive involvement in bringing forward the Grosvenor Road site by DSD is essential to reinforce Belfast City Centre as a core office location offering a high quality product.
The pent-up demand now being experienced in the City Centre needs to be controlled to ensure that the maximum regeneration benefits are accrued. This Framework sets down a number of steps which should be undertaken to achieve this. The first step is to prepare development briefs for the priorities outlined, backed up by design guidance.

Detailed submissions by developers will need to be appraised against a number of criteria such as track record, financial backing, vision, deliverability and sustainability. This Framework draws particular attention to planning, design and heritage issues, including respect for the ‘urban grain’ impact on the townscape, density, street vitality, conservation impact and connectivity.

This Framework sets out a clear strategy for the regeneration of the City Centre enabling it to dictate the pace of change and to ensure appropriate development. It builds upon the City’s many strengths over the medium to long term, enabling the public sector to spearhead this transformation.

In seeking to deliver the regeneration of Belfast City Centre it is essential to understand that it is not possible to deliver new investment and development in all areas of need at once. This relates as much to investment in infrastructure, the public realm and to commercial office development as it does to retail development.

Indeed, not only is there a limit to the amount of public support that can be made available at any one time, but when considering commercial investment it is essential to avoid market confusion by supporting or promoting too many competing sites or schemes. Moreover an over-supply of available land can directly impact upon value and scheme viability. It is for this reason that it is important to adhere to a sequencing of investment.
1 Introduction

Context

1.1 Belfast is on the cusp of an exciting new era in its evolution. The onset of the peace process has precipitated development and market interest at a level unparalleled in recent history. The success of Laganside has demonstrated the potential within the city, but it is the changing political climate and the pent-up demand that is encouraging investment which should enable the city to realise it’s full potential.

1.2 Moreover, the national and provincial policy environment has brought regeneration and cities back to the top of the political agenda. The Government now recognises the important role that cities have to play as engines for growth and prosperity. It is the City Centre that will lead this renaissance for Belfast. However, it is essential that this renaissance is achieved in a structured manner in order to optimise the potential and to prevent mistakes made before and in other cities.

1.3 This document provides the framework to guide this investment in the City Centre. In accordance with the brief the emphasis is on retail led regeneration, but the framework recognises the need for a holistic approach to regeneration and to guiding the planning policy process through the emerging Belfast Metropolitan Area Plan (BMAP).

Brief

1.4 In April 2001 the Department for Social Development (DSD) prepared a development scheme for the proposed Victoria Square development and in June 2001 published Notice of Intention to vest land required in connection with the scheme. The Secretary of State (SoS) took the decision to adopt the development scheme with amendments and on 13 January 2003 the Minister announced this decision. The Minister, in announcing the adoption of this scheme, recognised the need to safeguard the regeneration priority of Victoria Square over other locations, but also recognised the need for a regeneration framework to ensure wider and longer term regeneration beyond the Victoria Square area. The proposed Victoria Square development has recently received planning permission from the Department of the Environment (DoE).

1.5 The Minister stated in his press release:

"I am aware also of the need to look further ahead to see what scope there is for other Belfast City Centre locations to benefit from retail led regeneration. Therefore, in the next few weeks my Department will be launching a review of its regeneration policy framework for the City Centre retail area so that Belfast can benefit from coherent and sustainable regeneration in future years."
1.6 As a result of this the DSD established the brief for the preparation of this Regeneration Policy Framework which seeks to address the following:

i) to produce a medium/long-term integrated and sustainable regeneration framework for the City Centre having regard to the provisions and requirements of the Victoria Square scheme as the Department’s main priority;

ii) to establish regeneration objectives for the City Centre within the context of the emerging BMAP (Belfast Metropolitan Area Plan) and BMTP (Belfast Metropolitan Transport Plan). The Study should, in particular, consider the following in the context of how they contribute to regeneration:

- improvement of townscape and public realm;
- urban design;
- tackling dereliction;
- the need for a mix of retail and other uses;
- the need for integration, permeability, improvement of pedestrian circulation and linkages;
- transportation, car parking, accessibility;
- a 24-hour environment;
- job creation; and
- conservation, archaeology, natural and built heritage.

iii) to identify locations for retail and other development which support the regeneration objectives;

iv) to identify a phasing programme for new retail and, if appropriate, other development in the City Centre, taking into account commercial and market related factors, and which delivers maximum regeneration benefit having regard to the priority of Victoria Square;

v) to consider current potential future major development proposals and formulate criteria to assist DSD in assessing these schemes and judging whether it should support them; and

vi) in preparing the Report to have regard to Government policy for New Targeting Social Need and its statutory Equality obligations.

1.7 The brief also requires the framework to add substance to the draft Belfast Regeneration Office (BRO) Strategy and develop a ‘planned and phased’ approach to City Centre Regeneration. The study takes account of the statutory powers of DSD and other Government powers and will be used to inform the draft BMAP.
The Regional Strategy – ‘Shaping our Future’.

1.8 The economic policy context for this work is provided by the Regional Development Strategy (RDS) – ‘Shaping our Future’. In establishing the vision to create an outward–looking, dynamic and liveable region and to sustain a high quality of life for all, the strategy states that “securing a strong and vibrant capital city and metropolitan area is vital to the economic and social well-being of Northern Ireland”.

1.9 The RDS sets down a series of Strategic Planning Guidelines to ensure that the city of Belfast is a “strong city capable of competing in the league of other European cities”. The key objectives for the City Centre include:

- improve its international image;
- facilitate City tourism;
- strengthen regional gateways;
- tackle areas of disadvantage and physical decline;
- strengthen its role as a regional shopping centre;
- reinforce its role as a culture and arts centre;
- develop the Cathedral Quarter;
- continue riverside renewal;
- progressively enlarge and enhance the pedestrian priority zone;
- promotion of a high quality cityscape; and
- upgrade the arterial routes.

Regional Transportation Strategy for Northern Ireland 2002-2012

1.10 The Regional Transportation Strategy (RTS) identifies strategic transportation investment priorities and considers potential funding sources and affordability of planned initiatives over the next 10 years. The RTS is the “daughter document” of the RDS. The overriding aim of the RTS is “to have a modern, sustainable, safe transportation system which benefits society, the economy, and the environment and which actively contributes to the social inclusion and everyone’s quality of life”.

1.11 The RTS provides a range of transportation initiatives across Northern Ireland including:

- upgrade of existing rail network and services;
- provision of new, modern trains and increased rail capacity;
• quality Bus Corridors on all main Belfast commuter routes;

• commencement of rapid transit network in the Belfast Metropolitan Area;

• improvements to assist pedestrians and cyclists;

• strategic highway improvements;

• demand management measures in Belfast – following improvements to public transport, parking charges could be raised and/or parking availability reduced for long term parking; and

• more comprehensive demand management measures will also be considered such as road user charging.

1.12 Implementation of the RTS initiatives for Belfast City Centre will be through BMAP.

**Belfast Metropolitan Area Plan (BMAP)**

1.13 BMAP covers the administrative districts of Belfast, Carrickfergus, Castlereagh, Lisburn, Newtownabbey and North-Down. It will provide a planning framework to guide and control future development until 2015.

1.14 On 10 January 2001, Mr Sam Foster, Minister for the Environment, announced the commencement of work on BMAP. At the end of 2001, the Issues Paper was published and the consultation period ran from December 2001 to August 2002. The Draft Plan is due to be published in Spring 2004 and this will be followed by a Public Inquiry held by the Planning Appeals Commission before the Plan is adopted.

1.15 The Issues Paper emphasises that the BMAP Team are seeking to reinforce the role of Belfast “… both as an international city and a regional capital and strengthen its position in the league of European cities”. The Paper emphasises the fact that the role of Belfast City Centre “… as a regional shopping centre as well as the educational, cultural and arts capital needs to be supported and reinforced”. In accordance with these objectives the Issues Paper considers the opportunities to:

- protect the built heritage and enhance the City Centre through new urban spaces, landscaping, landmarks and public art;

- redevelop the peripheral areas of the City Centre;

- strengthen the shopping role;

- reconsider office location;

- enlarge City living; and

- develop a twenty-four hour City.
Belfast Metropolitan Transport Plan (BMTP)

1.16 The BMTP will be a daughter of the Regional Transportation Strategy (RTS) and cover the same six District areas as the BMAP. The BMAP will provide the local transport plan for the Belfast Metropolitan Area (BMA) and will set out transport schemes and measures expected to be implemented up to 2015.

1.17 The BMTP is being developed in parallel with the BMAP to ensure an integrated approach to land use and transportation planning. The BMAP will set out the future land use for the BMA and will incorporate the main proposals outlined in the BMTP, which will then be subject to scrutiny through the development plan’s statutory process. The BMTP will be completed later this year.

Draft Strategy from Belfast Regeneration Office

1.18 This Regeneration Policy Framework has also been completed reflecting the draft strategy for the Belfast Regeneration Office (BRO). This draft strategy is underpinned by a shift towards a more holistic “needs driven and knowledge led” approach. The thrust of the draft strategy is to “create an urban environment where all and not just a few can aspire to enjoy a high standard of living and good quality of life”. It focuses on four priority areas:

- encouraging investment and physical regeneration;
- raising educational achievement;
- improving access to employment; and
- creating safe healthy communities.

1.19 Of particular relevance to Belfast City Centre Regeneration Policy Framework are objectives set by BRO for encouraging investment in physical regeneration across the City, namely:

- increase the area of commercial/retail floorspace and improve existing provision;
- support the development of city-wide infrastructure;
- improve the quality and availability of public space; and
- regenerate brownfield land.

1.20 The BRO draft Strategy stipulates that BRO will support:

- facilitation of major retail-led development of Victoria Square;
- consideration of opportunities for other complementary development opportunities in the City Centre;
- encouragement of City living especially within mixed use developments;
• a review of the potential and opportunity that public space can provide; and

• promotion of the controlled release of development opportunities to stimulate private sector investments.

1.21 It is in the context of this draft strategy that DSD produced a Development Brief for the Victoria Square area of Belfast City Centre.

Victoria Square – Development Scheme and Brief

1.22 In the context of planning policy and the City’s evolving urban structure, DSD undertook a review of the most appropriate locations for major new retail development in Belfast City Centre. Following this review DSD adopted a ‘Development Scheme’ for the Victoria Square area of the City Centre as the preferred location for major new retail development. It was considered that development in Victoria Square would play a major role in enhancing the regional role, vitality and viability of the City Centre whilst regenerating the Ann Street/High Street area, and strengthening links to developments along the River Lagan.

1.23 The Scheme’s main objective is “to secure a comprehensive, major retail led mixed use scheme, which regenerates the Victoria Square area, enhances the City Centre’s regional role, integrates with the surrounding urban fabric and strengthen links with the Lagan”.

1.24 Victoria Square is located in the southeast sector of the City Centre. The Square is bordered by Victoria Street to the east, Chichester Street to the south, and to the west and north the site forms part of the main shopping area, linked via Ann Street and William Street South.

1.25 The Brief for Victoria Square promotes:

• a comprehensive and distinctive proposal of sufficient critical mass. The amount of floorspace has not been prescribed however a retail element in the order of 500,000 sq. ft. is advised;

• a scheme which fully integrates with the City Centre and more specifically the designated Main Shopping Area through highly permeable circuits, twenty-four hour pedestrian access, pedestrian links and public realm improvements;

• the implementation of a mixed use scheme, albeit predominantly retail to underpin Belfast’s role as a leading regional shopping centre. Other “in principle” acceptable uses include residential, leisure, catering, hotel, offices, civic/cultural/community, open space and car parking;

• a scheme which maximises the accessibility of Victoria Square from all parts of the City through public transport provision and pedestrian, cyclist and taxi accessibility;

• an outward looking scheme which is compatible with the existing streetscape. Character and quality, scale and massing and scheme frontages are the key considerations for urban design;
• a scheme which promotes, through its mix of uses, quality in design and permeability, the attractiveness of the City Centre to a spectrum of visitors during the day and evening; and

• a project which addresses the New Targeting Social Need (New TSN) initiative by adding value to the local economy, tackling unemployment, enhancing employability and maximising training opportunities for local people.

1.26 The Regeneration Policy Framework for Belfast City Centre set out in this report takes full cognisance of policy and guidance set down in the RDS, the BRO draft Regeneration Strategy, the RTS, the opportunities outlined in the BMAP Issues Paper and the Victoria Square Development Brief.

Report Structure

1.27 In this context this report sets out a Regeneration Policy Framework for Belfast City Centre. The report is structured as follows:

• Section 2 sets out the vision for the City Centre, and the goals and objectives underpinning the study;

• Section 3 presents a physical, economic and social appraisal of the City Centre;

• Section 4 presents the Strategic Policy Framework which will guide the delivery of the vision;

• Section 5 addresses Strategy priorities and issues relating to delivery; and

• Section 6 concludes this document.

1.28 A number of appendices provide supporting information to the Framework.
2 Vision and Strategic Goals

2.1 The Regeneration Policy Framework outlined in this document considers Belfast City Centre in a multifaceted way. It builds on the strengths of the City, its business community, its people, its heritage and its unique character and history. It is also a strategy based on commercial reality, building on the good foundations already in place in the City and utilising the wealth of excellent research and studies completed by others over recent months, and in some cases ongoing.

2.2 The aspiration is to see Belfast become a prosperous City, a ‘Living City’ which is an engine for regeneration and economic activity and which rivals its peer European cities.

2.3 It is clearly evident that change has occurred in the City of Belfast and that market interest is increasing. However, a flexible framework is required to evaluate initiatives and to set out criteria which boost wealth and sustainable job creation for the benefit of residents of the City and its hinterland.

2.4 The Framework will provide a vital context against which detailed action plans can be created (where they are not already in place) to deliver the interventions described. It is intended to guide the changes that are already occurring in the City Centre, to ensure that maximum regeneration potential of all interventions and initiatives are achieved in a co-ordinated manner. It will also provide the basis for DSD to take direct action to facilitate appropriate development – not only retail development, and other improvements to assist the regeneration process.

Vision

2.5 This document sets a high but attainable vision for Belfast, centred around achieving quality retail development, a rich public realm of high quality streets and open spaces, the appropriate re-use of architecturally significant structures, opportunities for new, contemporary buildings, and an adaptable and realistic strategy for implementation. All will result in establishing Belfast as a premier City for the 21st century.

2.6 Situated in beautiful and easily accessible natural surroundings, Belfast has all the elements required to provide a high quality of life. The City has an international recognition and history established around shipbuilding.

2.7 The vision for Belfast is of a prosperous and commercially successful City at the heart of a city-region which is reinventing itself as a new and dynamic modern economy; one that embraces both the new information and high technology sectors and an economy based on the City’s traditional skills and reputation in educational achievement.
2.8 Many of the problems that the City is tackling in terms of social inclusion, deprivation and unemployment cannot be addressed in the absence of a strong and vibrant City economy. The strategy we have developed needs to link to the work of other agencies in the City, to ensure that the opportunities created are shared and spread into areas of need and the most vulnerable communities.

2.9 Belfast in 2020 will be a vibrant, safe and easily accessible City. The City Centre will be recognised for the quality and diversity of its shopping. It will be the leisure and entertainment centre of the region. It will be a premier tourism destination in its own right. The core will be served by an efficient public transport system, but there will also be better access to certain areas of the City by car, clearly signposted to safe and convenient parking. The central area will be recognised for the quality of civic spaces and streets, with these spaces extended to provide a world class and well managed environment for all users.

2.10 The retail core will be totally transformed to offer the full and exciting range of shopping, leisure and cultural destinations that a leading regional City Centre should have. The aim is to attract not just local people, but national and international visitors, to explore the new City attractions.

2.11 At night, new mixed-use residential neighbourhoods will enliven the heart of the City. A permanent City Centre population will provide better surveillance of the streets and fuel an expansion of local services, shops, café-bars and restaurants.

2.12 No single project or policy will “turn the City around”. The vision for the future is of a cohesive central area where individual projects, programmes and strategies integrate and support each other and the whole is greater than the individual parts. These projects build on recent successes, including Laganside, but seek even higher standards of design and quality, utilising the support of DSD to achieve these standards.

2.13 Once the momentum is created, the challenge is to ensure that the benefits of this vision reach right out into the most deprived communities – within the City and beyond to the sub-region.

**Goals and Objectives**

2.14 The Framework focuses on the following three core goals which lie at the heart of the regeneration strategy and are central to the transformation of the City Centre:

- **creating** a vibrant City as a centre for learning, culture, retail, leisure and living;

- **improving** accessibility to the City Centre by all modes of transport; and

- **enhancing** the public realm – bringing high quality public spaces to all parts of the City Centre and harnessing the City’s heritage.
2.15 Within these three core goals the Regeneration Policy Framework can be distilled to a series of supplementary objectives as follows:

- to strengthen the City Centre as a premier regional shopping destination;
- to create a high quality safe urban environment, attractive to investors, employees, residents and tourists which generates a sense of pride in the City;
- to build upon the City Centre’s rich historic character through complementary and contemporary design;
- to establish a 21st century economy well placed to compete with other European cities, thereby creating new job prospects for the people of Belfast;
- to create inclusive communities and a skilled and adaptable workforce able to contribute to and share the benefits of sustainable economic growth;
- to set a benchmark for the next generation of City Centre development;
- to identify public attractions which complement existing facilities and establish Belfast as a premier tourist destination;
- to create a sustainable and vibrant City Centre which supports a quality lifestyle attractive to inward investors and potential future residents;
- to create quality strategic gateways into the City Centre, thereby making it a welcoming experience to visitors;
- to attract and retain young people by providing strategic learning opportunities and competitive career prospects;
- to encourage growth of the creative industries;
- to confirm the identity of Belfast as a premier European City; and
- to create an effective and efficient delivery mechanism for the implementation of the Vision.

Objectives Explained

2.16 These objectives should guide the regeneration process for Belfast City Centre in order for the City to realise the ambition of being recognised as a physically and economically attractive magnet for commercial investment, residential expansion and the leisure and tourism ‘capital’ for the province.

2.17 With an emphasis on retail-led regeneration the Regeneration Policy Framework sets out the principal actions that must be taken for the City Centre to achieve these objectives. These objectives are clearly described below:
A Premier Regional Shopping Destination

2.18  The City Centre’s retail offer must be improved dramatically so that it can compete with its competitors and fully respond to latent demand and catchment. The offer must be modern and present a unique image of Belfast. It must provide for a wide cross-section of the community. It must also provide specialist and niche products for the discerning customer to differentiate Belfast’s shopping offer. It must be structured in its provision to ensure maximum regeneration benefit for the City Centre and City as a whole.

High Quality Safe Urban Environment

2.19  Belfast needs to maintain a high quality, safe urban environment, which is attractive to potential investors in the City as well as employees, residents and tourists. This must be done in such a way that it engenders a sense of pride in the City with its residents clearly perceiving the City Centre as inclusive rather than exclusive.

Build Upon The City Centre's Rich Historic Character

2.20  World-class quality design must shine through all investment whether it be new buildings or refurbishments, or the surrounding public realm. The City should be prepared to embrace world-class and innovative approaches to design. Much has been achieved through the efforts of the Laganside Corporation, but much remains to be done in the core of the City Centre, addressing the mistakes of the recent past.

Establish a 21st Century Economy

2.21  The City Centre must reflect the 21st century economy and be able to compete with other European Cities. It must provide high quality space that allows the City Centre’s existing and new businesses to flourish. It must become a ‘business friendly’ City, with investors attracted by the service that the City provides which in turn will facilitate inward investment. Although beyond the scope of
this Study, the City must recognise its competitive sectors and business clusters and focus on growing these in the future, so that new and sustainable jobs are created. Guidance in this respect is provided by the Regional Strategy.

**Build Inclusive Communities and a Skilled and Adaptable Workforce**

2.22 All of Belfast’s communities must be skilled and adaptable to ensure that they gain the benefit of the opportunities that are created by the regeneration of the City Centre. The New Targeting Social Need initiative and the emerging Northern Ireland Neighbourhood Renewal Strategy seek to address this issue.

2.23 No community in Belfast should feel that it has been excluded from the benefits that have been created by the successful regeneration of the City Centre. Belfast’s workforce must have relevant up to date skills that are adaptable to the needs of the global economy. Inward investors should look favourably at the skills availability and profile of the City’s workforce. It is beyond the scope of this work to address this, but it must be core to the aspirations for the City as a whole.

**A Premier Tourist Destination**

2.24 Cities become known for their cultural attractions as much as for anything else. A number of new public attractions should be developed to complement existing facilities in the City Centre. These must be recognised as special attractions and unique in their own right. The aim would be to improve Belfast’s visitor offer significantly so that the City is seen as a premier tourist destination.

**A Quality Lifestyle**

2.25 Belfast City Centre must be sustainable and vibrant, supporting a quality lifestyle attractive to existing residents, potential future residents and inward investors. The environment which is created must promote City Centre living for all and provide a balance of 24-hour leisure provision with 24-hour living. A feature of the City is the diversity offered by successful ‘independent’ shops, bars and restaurants. The City has not suffered the ‘take-over’ of the multiples to the same extent as other UK cities, with the consequential lack of diversity. It must preserve this ‘richness’ but expand its diversity – it can become a unique feature.

**Creating a Welcoming Experience**

2.26 Quality strategic gateways into the City Centre must be provided to make the City Centre accessible to all. The experience must be welcoming, giving the visitor a sense that they are entering a high quality, European City. DSD has a role to play facilitating quality development at these Gateways. Of particular importance is the Gateway from the west at Grosvenor Road and the Gateway from the North around York Street, Nelson Street and Great Patrick Street.
Competitive Career Prospects

2.27 Belfast will need to retain more of its student population following graduation by providing excellent career opportunities in diverse sectors of the economy. A highly successful City Centre will be critical to achieving this.

2.28 The creative industries, such as advertising, architecture, fashion, music and entertainment, writing and publishing can play an important role in driving the modern economy, generating wealth and job creation. This has emerged as one of the fastest growing sectors of the UK economy, growing by an average of 9% per annum between 1997 and 2001 (DCMS). Cities across Western Europe are looking to the creative industries to bring new wealth, sharpen city image and to address social inclusion issues, and Belfast should follow this example.

Belfast's Premier European Image

2.29 Belfast must build on its international name and dispel previous negative perceptions so that the general public see the City as a safe, vibrant, interactive place recognised for its innovation, creativity, cutting edge design and ‘sense of humour’.

An Effective and Efficient Delivery Mechanism

2.30 A streamlined and efficient delivery mechanism must be established if the Regeneration Policy Framework for the City Centre is to be implemented successfully. This will require a pro-active approach by the public sector – DSD, learning from the achievements of Laganside, but also from more recent initiatives and approaches in successful UK cities. DSD must take the lead in delivering regeneration, setting the agenda and directly intervening to ensure quality of development and design required, in the most appropriate timescale.
3 City Centre Appraisal

3.1 The modern city is a complex combination of physical, social and temporal influences. Streets, buildings and squares are the stage upon which everyday life is acted out by its people. In producing the Framework for the regeneration of Belfast City Centre, the underlying physical, economic and social factors shaping the city have been appraised.

3.2 The analysis sets the context for the interventions and recommendations in the Policy Framework. The economic appraisal examines the character and emerging trends in the office, retail, residential and tourism sectors. The social appraisal examines the challenge facing the City of Belfast and its people. The physical appraisal examines the built environment of the City Centre, including its buildings, public realm and transportation infrastructure. Consultation with key stakeholders has been central to developing the Framework.

Economic Overview

Retail

3.3 The prime retail pitch in Belfast extends along Donegall Place and Royal Avenue and into CastleCourt. The larger stores of M & S and Boots are to the south, with CastleCourt anchored by Debenhams to the north.

3.4 Other shopping centres include the Victoria Square Shopping Centre, comprising over 20 shops with frontages to Chichester Street and the Hi Park Centre in Church Lane. There are three retail arcades, namely Donegall Arcade, Queens Arcade and The Spires Centre, all providing a mix of local retailers.

3.5 Secondary shopping areas include Lower North Street and Rosemary Street located just off Royal Avenue and shopping located off Wellington Place, Howard Street, High Street, Fountain Street, Castle Street, Arthur Street and Chichester Street.

3.6 According to floorspace data provided by Experian GOAD, the total retail floorspace for Belfast City Centre is 1,664,200 sq. ft with comparison floorspace totalling 1,138,200 sq. ft. Debenhams is the only department store in Belfast, and occupies 100,000 sq. ft. According to the GOAD statistics, this is 10% of existing comparison floorspace, which is small compared to other UK cities. In terms of variety stores, the existing floorspace is 150,000 sq. ft or 13% of the total comparison floorspace according to GOAD. Again this is a small proportion when compared with other UK cities. Multiple shops occupy 1.1 million sq. ft, which equates to 60% of the total floorspace.
3.7 The results of a household survey undertaken by Roger Tym & Partners\(^1\) in November and December 2001 as part of the Regional Retail Study highlighted a number of trends:

- shoppers are willing to travel further for comparison shopping and there is a clear, perceived need for more shops selling clothes and shoes;
- most shoppers are happy with the level of convenience shopping and;
- respondents were evenly split between the need for more stores selling bulky comparison goods but were generally happy with the existing provision.

3.8 In 2001, Experian\(^2\) ranked Belfast as 50\(^{th}\) with the ranking declining to 55\(^{th}\) in 2002. This is well below the regional centres of Glasgow, Manchester and Edinburgh, which were ranked 2\(^{nd}\), 6\(^{th}\) and 12\(^{th}\) respectively in 2001. Verdict also ranked Belfast in a lower position in 2002 than 2001. Based upon the range and quality of national retailers represented in a centre, Management Horizons\(^3\) UK Shopping Index ranked Belfast as 8\(^{th}\) in 1998–1999, which was an improvement on 11\(^{th}\) in 1995–1996. Belfast’s rank dropped to 23\(^{rd}\) in 2001.

3.9 Pedestrian counts by PRMS show highest flows outside CastleCourt at the entrance on Royal Avenue. Ann Street is also a ‘hot spot’. The principal secondary flows are on Castle Street, Fountain Street/Lane, Arthur Street, William Street, High Street, Castle Place, Corn Market, Ann Street and Donegall Street.

3.10 Zone A rents of £190 per square foot (psf) have been achieved in the City Centre and it has been reported that £185 psf plus a premium was achieved for the Baby Gap Unit in CastleCourt. Off prime, Zone A rents of £145 psf have been realised in a refurbished unit in Castle Place. The Littlewoods building on Ann Street has achieved a rent of £100 psf. Such rental levels in both prime and secondary retail areas indicate strong retailer confidence. A lack of supply of prime, modern units is however fuelling rental growth.

3.11 A lack of good, quality modern retail space in prime areas has led to major multiple retailers looking at more peripheral locations to secure space. Many retailers are trading out of old and poorly configured units. There is a significant need for additional, quality space.

3.12 Drivers Jonas’s\(^4\) research in reviewing proposed retail development schemes in the City Centre estimates capacity for 554,147 sq. ft of additional gross lettable floorspace by 2004, 860,689 sq. ft. by 2007 and 1,189,510 by 2010.

3.13 Roger Tym and Partners predict in their research that per capita convenience spend will increase from £1,715 in 2001 to £1,821 in 2011. This is an increase of £106 per person with a total for Northern

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\(^{1}\) Northern Ireland Retail Research, February 2003 – Roger Tym and Partners


\(^{3}\) Belfast City Centre Healthcheck and Benchmarking Report January 2003 – DTZ Pieda Consulting (Source: Management Horizons UK Shopping Index 2001)

\(^{4}\) City Centre Review April 2000 – Drivers Jonas
Ireland of £278m. Per capita comparison spend is projected to increase by £688 in the same timescale which generates an increase of £1,300 m for Northern Ireland as a whole. Based on these figures, there is capacity for 3.2m sq. ft of net sales comparison goods floorspace to be developed over the next 10 years.

3.14 House of Fraser has a specific requirement for Belfast and John Lewis, Selfridges, Alders, Bentalls, Dunnes and Harvey Nichols are all believed to be keeping a watching brief. There has also been serious interest from TJ Hughes, Mango, A Wear, Ecco, Lakeland and Austin Reed. Variety stores such as M & S and BHS are underrepresented in Belfast compared to other cities.

3.15 There has been major redevelopment by Redevo UK at the former C&A site in Donegall Place. The new 3 storey building has attracted two blue chip tenants – WH Smith, a newcomer to Belfast, and Next, moving from smaller premises in the City.

3.16 In relation to Multiple Shops, Management Horizons (1999) identified 80 retailers represented in Birmingham, Dublin, Leeds, Manchester and Newcastle who do not have accommodation in Belfast. The key gaps are in the fashion and sports sectors. Management Horizons have also identified 30 retailers who are either underspaced or are located in secondary space.

3.17 Given the regional role Belfast plays there is potential to attract a greater number of quality retailers, particularly in the 'fashion sector', for example, Moss Bros, Blakes, Blazer, Reiss, Mango, Jigsaw, LK Bennett, Russell and Bromley, Sport & Ski, Active Venture, Fat Face, Heals, The Pier, Whittards, Borders and Muji. Specialist traders in arts, retro sales, independent fashion, antiques and specialist cafes and bars also need to be encouraged.

3.18 It is in this context that there is strong developer interest in retail development in the City Centre with the proposal by MDC for Victoria Square which recently received Planning Permission and proposals by Ewart plc for Royal Avenue/Cathedral Way and by Westfield to extend CastleCourt, both the subject of planning applications.

**Offices**

3.19 Belfast is one of the world’s least expensive cities in terms of office costs. It also offers the UK’s most advanced fibre-optic telecommunications infrastructure and a range of financial assistance from Government agencies including Invest Northern Ireland (Invest NI).

3.20 In terms of occupiers, the principal users are Government (government office and agencies), Financial (banking institutions, financial advisors, accountants and tax advisors) and IT (computer companies, software development and communications). Looking forward demand will continue to be generated by
these sectors. More specifically there is real opportunity in the ‘knowledge’ based sector capitalising in educational excellence in the province at all including Tertiary level.

3.21 The traditional office district in Belfast City Centre is located to the south of Donegall Square North. Lanyon Place a ‘major office cluster’, comprising 314,669 sq. ft in four office premises- 144,493 sq. ft Grade A and the remainder Grade B.

3.22 Rents remain low, and growth is limited. At the end of 2000 rents of £12 per sq ft were achieved. Fujitsu Telecommunication Europe acquired 79,514 sq ft at £13.50 per sq ft for a 20 year lease during 2000.

3.23 Historically the office market has been driven by local demand from professional services and banking institutions. This demand has tended to range between 2,000 and 20,000 sq. ft and has remained reasonably steady despite the global economic situation.

3.24 The demand for Grade A space currently exceeds supply despite the global slowdown. The secondary market is more restricted with a higher vacancy rate and falling demand.

3.25 At the time of writing, it is estimated that there is approximately 800,000 sq ft of office floorspace in the BMAP area available to let or under construction. This will come onto the market in lot sizes upwards of 2,000 sq. ft. There is also 1.3m sq ft of space in proposed major office schemes in central Belfast, plus emerging proposals at Sirocco Works and the Titanic Quarter. Only a small number of these schemes will be refurbished or built on a speculative basis, leaving a large section awaiting pre-let in whole or part.

3.26 The demand from companies such as Avalanche, Amphion, State Street Bank and Nortel has recently been put on hold, although the view is held that this demand will return. Given the proposed and planned new stock this demand should be accommodated.

3.27 About 25% of office space in the BMAP area is occupied by the public sector. This demand has been for quality refurbished and secondary units rather than Grade A accommodation. All the ongoing requirements from this sector are in detailed negotiation or under offer.

3.28 Demand from local business for quality units of 10,000 sq ft continues despite the slow down. Invest NI are witnessing enquiries from inward investment companies looking for between 5,000 and 30,000 sq. ft.

3.29 Future demand for floorspace depends on the level of activity in the office sector. The indication is that a substantial amount of new office floorspace will be required in the City Centre over the next 12-15 years. This will need to be provided in a range of products from large floorplate developments to smaller units, including ‘own-front-door’ offices and workspace units.
Residential

3.30 Very little residential development took place in Belfast City Centre until the early 1990’s, mainly as a result of the political climate.

3.31 Between the early 1990’s and 1997 a handful of apartments were developed, including:

- Lagan View Court, developed to the east of the Lagan 10 years ago, sold extremely well. Two bedroom apartments sold for approximately £40,000;

- two and three storey schemes off Dublin Road – Sailsbury Court and Ashbourne Place – were built 8 years ago; and

- Somerset Studio, a conversion scheme, was completed 6 years ago.

3.32 These developments were relatively successful with young people seeing the potential of City Centre living. However, the last 5 years has seen the development of 10 residential schemes with over 700 apartments, as follows:

- Quay Gate: east of the River Lagan – 118 apartments, sold well;

- Queens Square: Victoria Street – 92 apartments, currently for sale;

- St John’s Wharf: Mays Meadow, Laganside – 68 apartments, all but 2 apartments sold;

- Georges Harbour: besides Central Station – 50, all sold;

- Greggs Quay – 30 apartments;

- Margarita Plaza: Adelaide Street – 90 apartments, all sold;

- The Bass Building: Alfred Street – 114 apartments;

- City Gate: Sussex Place, off Alfred Street – 60 apartments;

- Clarendon Dock – 60 apartments; and

- Tannery Building: Castle Street – 34 apartments sold in 2 days. 2 bedroom apartments sold for between £85,000 and £105,000. 1 bedroom apartments sold for approximately £70,000.
3.33 Apartments for £120,000 or less have tended to sell quickly, where as units above this level have sold much slower.

3.34 Investors have come back into the market where properties are at the right price. Rents of £500 to £550 for 2 bedrooms and £450 for a 1 bed apartment are being achieved.

3.35 The general view is that the residential market is saturated at the present time with an over supply of apartments. The apartments are considered to be expensive compared to traditional housing which, in Belfast, is still in close proximity to the city core. The traditional housing stock represents a big pull, particularly in the south of the City.

3.36 Consequently, potential for new residential units in the City Centre in the short term may be limited. However, there is clearly longer term potential for more City Centre living on the back of investment in retail and leisure and in utilising riverside sites.

Tourism

3.37 The number of visitors to Belfast increased from 443,500 to 545,200 between 1995 to 2000. 61% of visitors were from Britain, 21% from Republic of Ireland, 7% from North America, 7% from Europe and 4% from other overseas locations. The main reasons for coming to Belfast were for visiting friends and relatives, business and holidays.

3.38 Tourism contributes to 2% of GDP this compares with contributions of 6% and 7% in Scotland and Republic of Ireland respectively. The total tourism spend in Belfast increased from £57.2m to £91.6m between 1995 and 2000. The number of people employed in tourism in Belfast increased by 1,668 between 1995 and 2000, from 2,638 to 4,351. The figure for 2000 equates to 26% of the total for Northern Ireland.

3.39 In 2001 there were 18 hotels in the Belfast City Council Area with 1422 rooms. Only one of these hotels is 5 star, five are 4 star, seven 3 star, two 2 star and three unclassified. Comparatively Dublin has eight 5 star and eight 4 star hotels which shows there is scope for higher grade hotels. The total number of restaurants increased from 445 in 1998 to 530 in 2000.

3.40 In Belfast there are a number of important visitor attractions ranging from Botanic Gardens which attracted 650,000 visitors in 2000 to the City Hall which attracted 29,559 visitors in the same year.

3.41 Two recent attractions are the Odyssey and the Waterfront Hall. Odyssey is a multi-functional entertainment venue situated in Queen’s Quay. The centre offers an indoor arena which seats up to 10,000 people, a 12 screen multiplex cinema, an IMAX Cinema, W5 an interactive discovery centre and a range of bars, restaurants and other leisure facilities.
3.42 Odyssey opened fully in Spring 2001 following a roll-out of openings which started in December 2000. The number of visitors attracted to this centre between opening and October 2001 was 500,000.

3.43 The Waterfront Hall is the City's new Concert Hall. It is located in Lanyon Place which also includes a 200 bedroom Hilton International Hotel. The main auditorium and studios have flexibility to accommodate a wide variety of arts and entertainment, promotional events, concerts and sporting attractions.

3.44 Based on 4% increase per annum in visitors, by 2015 there should be 1,621,000 visitors to Belfast each year. The implications of such an increase are significant, particularly for accommodation provision. In order to accommodate this increase, 2,447 additional hotel rooms will be required. The main requirement will be for 3 star hotels, however there will also be demand for character hotels.

Social Appraisal

3.45 Whilst Belfast is now the regional capital in terms of commercial, social and public sector activity, it has been shaped by 30 years of civil conflict and disturbances.

3.46 The character of Belfast City Centre was largely determined by developments in the late 19th and early 20th centuries. It remained largely unchanged until the 1950’s when there was a spate of office and commercial development. The onset of the ‘troubles’ in 1969 saw the city enclosed within a security cordon and this, along with the growth in large scale out of town retailing, discouraged any further investment. This situation continued until the development of CastleCourt in the late-1980’s along with a number of smaller retail schemes. Office development followed simultaneously. In the 1990’s a number of major environmental schemes were implemented and the security cordon was removed resulting in greater investment in the city and more visitors.

3.47 At the start of the 21st Century, Belfast City Centre is poised for growth. Notwithstanding this, many of the problems and challenges facing the city, stemming from this prolonged unrest, remain, such as:

- Belfast, is ranked the most deprived Local Government District in Northern Ireland in terms of the scale of income and employment deprivation;
- long term unemployment is 38% in Belfast compared with 34% in Northern Ireland;
- there has been a 5.3% increase in the Northern Ireland population over the period 1991-1999, while in the same period there has been a decrease of 2.9% in the population of the Belfast area; and
- 47.5% of the total housing stock in Belfast is owner-occupied, which is lower that the Northern Ireland average of 63.3% (1998/1999).

3.48 Over the past four decades, deprivation has been tackled through wide ranging initiatives including Belfast Healthy Cities, Belfast City Vision and Economic Taskforces. In addition to these programmes there has been input from the European Union, the International Fund for Ireland, the National Lottery, Government Departments and local authorities. Furthermore, the Belfast Regeneration Office (BRO) was formed in 1997 and has not only acted as the DSD’s ‘local arm’ for regeneration but has also been
involved in a number of European Union Initiatives such as the Peace and Reconciliation Programme, URBAN and the Physical, Social and Environmental Programme.

3.49 There is evidence that the impact of this work has been very positive “in meeting the socio-economic and environmental needs of the residents of inner Belfast” (Deloitte and Touch, 1997). However, the areas of greatest need still lag behind the Belfast and Northern Ireland averages on the main indicators of quality of life.

3.50 Belfast City Centre is on the verge of radical change and the future potential for Belfast is vast. This potential needs to be harnessed for the prosperity of Northern Ireland. Opportunities need to be available to all individuals, otherwise the economic and social conditions will continue to undermine Belfast’s prospects of sustainable growth.

Physical Appraisal

3.51 Early Belfast was established as a settlement at a crossing point of the River Farset at its confluence with the River Lagan, in the vicinity of what is now the Custom House. The River Farset extended to the hills of the west, along the line of High Street.

3.52 The original Belfast Castle was built in 1200AD by the Normans, between what is now Castle Place and Corn Market. However, much of the current City form evolved in Georgian times, as industrialisation manifested itself, in the form of the linen, tobacco and ship related industries. It was during this period that much of the grid-iron street form was established, along with certain buildings of distinction, a number of which still exist. This legacy of a strong urban structure is a great asset that should be capitalised upon through the regeneration process.

3.53 The City Hall, built on the site of the former White Linen Hall at the turn of the century is the centrepiece of the City and is bounded by fine buildings around Donegall Place.

3.54 The Department of the Environment have designated three Conservation Areas within the study area, recognising their historic importance – the Cathedral Quarter, Linen Quarter and City Centre Conservation Area.

3.55 The recent history associated with civil unrest has had a significant impact on the City as a whole. In the last 30 years new and replacement buildings for those damaged in the ‘troubles’ have not been of the highest quality and in many instances have destroyed cohesion in the built form.

3.56 Over the last 30 years, many people have moved out of the City Centre and adjoining areas, choosing to live, shop and socialise in outlying areas. Whilst there has been a recent introduction of apartments to a number of areas, including alongside the River Lagan, the legacy of displacement still impacts on the City Centre with limited activity in the core areas after business hours.
3.57 A consequence of the displacement and of reluctance to use public transport during the ‘troubles’ is the high dependency of people on car borne travel into the City Centre and the resultant dominance of wide streets and vehicles within the core areas.

3.58 Laganside Corporation, established in the late 1980s, has had a significant impact on the development of the City. It was charged with the regeneration of the area to either side of the River Lagan, from Clarendon Dock to Stranmillis Weir. Fundamental to that process was the establishment of the Lagan Weir to control water levels. Now the area is evolving strongly. However, the success of the Laganside area has highlighted deficiencies in the quality of the traditional City Centre and connections with the river.

3.59 Today Belfast is an ‘understated’ City. However, it has a strong tradition and a latent potential in its setting, its urban form, its river and in a number of key buildings.

3.60 This potential needs to be realised through direct intervention in the public realm and street form, appropriate transport planning (including control of the car), and the highest quality urban and building design. Care in particular, is required to ensure that new development respects and supplements the core urban design strengths of the City. This does not necessarily mean a ‘traditional’ or ‘vernacular’ approach to architecture, but it does mean avoiding urban form that is alien to the Georgian and Victorian character of the City. A number of developments, including retail developments, have failed in this regard to the longer term detriment of the City.

3.61 Aside from the quality of civic space and public realm one specific area that needs attention in the City Centre is ‘connectivity’.

3.62 Connectivity in urban design terms describes the degree of physical linkage between places. It relates to the convenience or otherwise of getting to and from the City Centre and, whilst there, moving around and within it. It focuses upon all forms of public and private vehicular movement and, most importantly, pedestrian activity. It connects the physical linkages with the public realm.

3.63 Connectivity is a particularly poignant analytical term for Belfast City Centre. The appraisal of the economic, social and physical context highlight fundamental problems in connections:

- across and within areas of the City Centre; and

- from the City Centre to neighbouring inner city living areas as well as to key City Centre approaches.
3.64 Connectivity needs to be addressed, respecting that movement and public realm are reciprocal. Where inadequate connectivity presently occurs in the City Centre this can usually be pinpointed to one or a series of transport or public realm decisions which have been implemented without considering their wider effects. Inevitably the adverse consequences of these decisions have been felt in market and social senses at least as much as in physical terms.

3.65 A number of key issues have emerged during the appraisal of the whole City Centre which should be addressed to reinforce the concept of connectivity. These can be summarised as follows:

- **The Quality of Arrival:**
  In general terms Belfast City Centre is accessible by a reasonable choice of transport modes, though the lack of a central rail station is a disadvantage. The ‘welcome’ is however less good. This poor quality of arrival is widespread, but is particularly poor from the West and North. It is vital for a successful City Centre to have a high scene-setting quality at these first points of arrival.

- **The Balance Between the Core City Centre Development Opportunities and Existing Infrastructure:**
  A number of new development opportunities present themselves across the whole central area. In order to improve the offer of the City Centre as a whole, it is vital that the City Centre’s approach to infrastructure is addressed in order to provide good connectivity to and between these development opportunities.

- **Crossing Key Functional Divides within the City Centre:**
  There is significant ‘disconnection’ between key areas of the City Centre making the planning of successful movement and public realm key issues for the City. Nowhere is this more obvious or poignant than between the River Lagan and the remainder of the City Centre.

- **The Increasing Importance of Public Realm:**
  Since the 1990’s there has been a growing awareness in many European and in certain UK Cities of the importance of quality civic space and public realm for an increasingly enlightened public. This is against a background that if City Centres were to become continually successful against, for instance, out of centre schemes, they have to offer better and more diverse streetscape encouraging wider use throughout the day. During the 1980s/90s, Belfast fell markedly behind a number of its peer cities in this respect. As a result it needs a major step change in public realm in order for the City Centre to regain its pivotal role in the economy of the sub-region and help fulfil its job generation role.
• The need to rationalise traffic routes and priorities to put people before vehicles.

There is a need to consciously plan for a City Centre where the pedestrian has priority, in conjunction with step changes in the quality of public transport provision and essential servicing. This does not mean more pedestrianisation. Whilst key primarily pedestrianised streets and spaces will be appropriate in certain cases, the bigger connectivity aim is to make all the key City Centre streets more commodious for pedestrians, whilst giving more choice and access to better public transport provision.

3.66 Two studies have been commissioned to address ‘urban design’ and ‘public realm’, respectively in the City Centre, by two different clients. The Urban Design Study (First Working Draft) by Urban Initiatives for DoE (BMAP) and the Belfast City Centre Public Realm Strategy by the Paul Hogarth Co for DSD. Looking forward it is important that the conclusions of the studies are fully integrated.

3.67 The public realm strategy concludes the following from a physical appraisal:

• prolific amount of open space but very little genuine public realm;

• materials lack quality and cohesion;

• appropriate location of linkages through the city but inappropriate quality;

• building uses function within zones but are disjointed from surrounding areas – lack of cohesion;

• lack of critical mass to retail/visitor experience; and

• failure to provide memorable civic spaces.

3.68 Based upon a detailed appraisal, a strategic response to the need for positive change is presented. This is based on a number of overarching concepts.

• The Character – the image of the city as a whole and the need for distinctive Quarters.

  - consolidation of positive characteristics such as ‘warmth’ of people, views to the hills to the east and west, the relationship with the River Lagan and Lough and the historic roots to the Port.

  - need for consolidation, but also to respond to distinctiveness of areas within it, with the concept of ‘City Quarters’.

  - maximisation of the building relationship with the street in terms of active uses.
• Green Links – the concept of physically as well as visually linking the city with the hills to the west and the east and the value that green space brings to the City.

  - linkages of existing open spaces with new ones to create ‘Green Links’ with an emphasis on pedestrian and cycle movement along the Link.

  - harness the benefits of riverside development to engender activity on the banks of and on the River itself.

• Legible hierarchy of routes and spaces – the proposed structure of public realm.

  - identification of three tiers of space and routes that link them.

  - the tiers of public realm should relate strongly and should link with the River Lagan.

• Principal civic space (Donegall Square) and civic spine

  - importance of Donegall Square cannot be over emphasised.

  - need to address building uses and dominance of vehicles as they currently isolate retail core to north and commercial core to south.

  - facilitate high value, niche sector retail around four sides of the Square.

  - consideration given to the role of City Hall.

  - creation of civic spine extending north along Royal Avenue/ Donegall Place and to the south along Linenhall Street.

• City spaces and routes – a number of key spaces are identified.

  - Custom House Square
  - Lanyon Place
  - Corporation Square
  - Odyssey Plaza
  - Queen’s Quay
  - High Street/ Castle Street
  - Chichester Street and May Street
  - Waterfront Boulevard
  - Odyssey Boulevard
  - Rosemary Street/Lombard Street

• Neighbourhood routes, spaces, nodes and gateways – a number of key areas have been highlighted.
- retail core: high quality, durable materials. Arthur Square should be developed to provide a focus

- Bank Square: redeveloped as Neighbourhood Space, branded as an outdoor market

- Cathedral Quarter: St Anne’s Cathedral is the focus for the area

- Writer’s Square: Currently lacks vitality

- Bridge Street/ Four Corners: historical importance and links with Retail Core and Cathedral Quarter

- Area around the Library and to the rear of CastleCourt: advocate zoning for comprehensive redevelopment incorporating business investment, own-door offices combined with residential properties and support facilities.

- Linen Quarter – office district: focus on St Malachy’s Church and setting

- Golden Mile - Great Victoria Street

- Blackstaff Square: should be developed as Neighbourhood Space for this Quarter.

- Public Transport

  - Effective public transport infrastructure is essential.

  - Proposed to consolidate Great Victoria Street Station as an integrated public transport interchange.

  - Proposal to develop a new station at Gamble Street with potential to relocate current Laganside Bus Centre.

  - Retention of Central Station.

  - Principle of providing access to centre of City is endorsed but other alternatives should be considered, for example a rapid transit system.

  - Public transport links along the Green Link should be considered.

- Private and commercial vehicles

  - Concepts to reduce the incursion of through traffic into the core areas should be combined with the provision of large high profile car parks at edge of core.

  - Establishment of inner loop.
3.69 There needs to be a coherent physical strategy for the City which reflects the content of the urban design and public realm strategies referred to above. This framework gives guidance on the core urban design and public realm interventions required to improve the City Centre and to help maximise investment and activity. These are addressed in Section 4.
4 The Strategic Framework

4.1 The City Centre is a regional investment priority – a key determinant of future city-wide and regional economic prospects. The City Centre, therefore, has a particular significance for the whole of the province. Within this context the Strategy sets out a flexible framework for realising the regeneration of the City Centre. It builds upon the existing economic, social and physical context and the wide range of opportunities identified, which if delivered and achieved, would regenerate the City Centre and in so doing help to reach the goals of the region, the sub-region and the City.

4.2 The Strategy focuses on the realisation of the opportunities outlined in the Appraisal. In order to achieve this, and recognising the focus on retail led regeneration as required by this brief, four key Action Areas and five Guiding Themes have been identified. Key interventions for any one Action Area or Theme should not be seen in isolation from the opportunities listed in the Appraisal. In terms of major development, the prioritisation of opportunities and potential projects is addressed in the next section.

4.3 An important core principle underpins this strategy, that is to regenerate the City Centre from its heart outwards, focusing on appropriate retail-led redevelopment. There is a risk of ‘diluting’ investment so that its full potential or benefit is not felt. It is important that this is avoided. It could be argued that in the past there has been too much development away from the heart of the City Centre, stretching investment too thinly, undermining the core and failing to establish a critical mass of development activity. Clustering of appropriate investment is essential to achieve the aspiration of a ‘24-hour city’ and to ensure a ‘vital and viable’ centre.

Action Areas and Guiding Themes

4.4 Five Guiding Themes and four Action Areas have been identified to help achieve the overall vision of regenerating Belfast City Centre.

4.5 The specific Guiding Themes are:

- new and diverse retail investment;
- modern offices/ business development;
- investment in tourism/ leisure;
- connectivity/ public realm enhancement; and
- reinforcing City Communities.
4.6 The specified Action Areas focus on the opportunities for retail led mixed use redevelopment or complementary development in the Shopping Core as specified in the brief. The aspiration is to complement and reinforce well established regeneration programmes, for example Laganside. The four Action Areas are:

- South East Shopping Quarter, including Victoria Square;
- North East Shopping Quarter, including the Cathedral Quarter;
- North West Shopping Quarter, including CastleCourt and the area to the north; and
- South West Shopping Quarter, including Fountain Street.

4.7 The Action Areas have been identified to:

- enable the Public Sector to create a co-ordinated approach to project delivery;
- provide the ability to sequence the preferred interventions to generate the optimum regeneration and economic benefit to the City; and
- concentrate related activity.

Themes

4.8 The Themes are envisaged as being City Centre wide, helping to guide investment generally across the Action Areas and beyond.

Retail

Regional Role

4.9 The re-emergence of Belfast City Centre as the premier shopping destination in the province is at the heart of this regeneration strategy for the City Centre. Northern Ireland requires a major regional shopping centre offering leading edge retailing opportunities in order to remain competitive.

4.10 Successful cities perform at the peak of the shopping hierarchy, offering the best range of department, multiple, variety, niche and specialist shopping and dominate retail spend within their catchment.

Quantity of Shopping Provision

4.11 Quantity as well as quality is critical for cities to achieve this pre-eminent position within their region. A number of regional City Centres in the UK are now actively addressing this quantitative issue through new development in response to out of centre shopping. These include Liverpool, Preston, Manchester, Sheffield and Birmingham.

4.12 It is evident from available research that there is significant capacity for further retail development in the City Centre over the next 10-15 years.
**Quality of Provision**

4.13 Aside from quantity, quality and diversity are also important. The aspiration should be to attract leading European and international brand retailers to the City. Certain retailers dramatically change the perception of a city, in the way that Harvey Nichols did for Leeds.

4.14 Diversity extends to opportunities for quality independent retailers as well as international brands. These do not need ‘prime pitch’, but are important in ensuring the City Centre appeals to all elements of society. The Northern Quarter in Manchester is a good example of this type of retailing, focusing particularly on fashion and the music industry. Belfast is already well served by independent retailers in the absence of the ‘onslaught’ from Multiples. These need to be safeguarded through the provision of appropriate accommodation.

**Mixed Use**

4.15 It is important to encourage mixed use in all new retail led developments – mixing leisure, residential and office uses with retail, though retailing should dominate. These uses make an important contribution to the vitality of the scheme and the City Centre as a whole in terms of evening activity, security and diversity.

**Locational Issues**

4.16 In no sector is the principle of consolidation of the core more important than in shopping. Major new shopping development can radically alter the form and function of a City Centre if not carefully implemented. The major shopping proposals being advocated are all within or adjacent to the shopping core.

4.17 The existing Belfast Urban Area Plan has at its core a presumption in favour of consolidating and maintaining the compact nature of the City Centre. It should remain a principal objective to consolidate the prime retail pitch, maintaining a ‘compact’ city with benefits in terms of pedestrian flows, commercial strength (rental and capital growth) and effective use of infrastructure.

4.18 A pre-requisite for this regeneration policy framework is support for the Victoria Square Development Scheme. This is addressed in more detail in the section on Victoria Square, but this scheme achieves the goal of reinforcing the prime pitch, strengthening the shopping core, whilst regenerating important secondary shopping areas.

4.19 The Victoria Square Development Scheme promotes a scheme which when implemented will create a ‘dumbbell’ effect with CastleCourt. CastleCourt already accounts for 29,727 sq m of shopping, compared to 48,190 sq m in the proposed MDC scheme for Victoria Square. A scheme at Victoria Square will result in two major anchors at either end of the City, with strong pedestrian flows between them spreading the benefit generated by this footfall.
4.20 In considering future shopping development in addition to the redevelopment of Victoria Square, two options effectively exist:

(a) build upon the ‘dumbbell’ effect by further investment in the North West Quarter of the Shopping Core in and around CastleCourt.

(b) encourage investment in the North East Quarter of the Shopping Core, between Royal Avenue and the Cathedral Quarter.

4.21 Because the Fountain Street area functions relatively well and can complement other proposals in the City Centre it not envisaged that DSD needs to assist major new shopping development in the location in the medium term.

4.22 It could be argued that Options (a) and (b) are not mutually exclusive options. However, there are a number of reasons which do not support this view in terms of the priority attached to one or the other. These become clear through the detailed consideration of both options as follows:

**Retail Development in the North West Quarter around and to rear of CastleCourt**

- the area to the rear of CastleCourt and more specifically to the north of North Street is one of the most interesting in urban form terms in the City. It is therefore important that redevelopment is of an appropriate type and form, sensitive to this character, but whilst recognising the very important links and relationship with the adjoining north and west Belfast communities.

- in its current form CastleCourt already acts as a strong anchor to the west of the City Centre Shopping Area;

- albeit a successful shopping centre, CastleCourt has done very little to regenerate sites/developments either side and to its rear – it presents a ‘wall’ to investment behind;

- Castlecourt is a 1980's shopping centre and is indicative of its time – a closed shopping mall development. It is comparable to the Arndale Centre in Manchester and Eldon Square in Newcastle, although smaller than either. In a similar manner to comparable shopping centres, say the Arndale Centre in Manchester, it has had the effect of ‘cutting off’ part of the shopping centre to its rear. In view of this ‘blocking’ effect to connectivity westwards and northwards and the failure of this scheme to deliver major urban regeneration to the rear of the centre care is required in
considering any future retail development in this location in the medium to long term. This issue is dealt with in greater detail later in this report.

**Retail Development in the North East Quarter of the Shopping Core**

- the promotion of a major shopping scheme in this Quarter could complement the Victoria Square scheme, creating reciprocal benefit and regenerating and enlivening the whole eastern edge of the shopping core;

- appropriate development in this Quarter would cement and consolidate the existing core. It would focus development, generating higher density development which is critical to achieving vitality and viability;

- an appropriate scheme in this Quarter would help 'kick-start' the Cathedral Quarter initiative. In order to do this any scheme should be of an appropriate scale and massing so it complements the fine grain nature of the Cathedral Quarter;

- retail development in this Quarter would enliven Royal Avenue as the prime shopping street, along its entire length, on both sides;

- it would complement CastleCourt and bring benefit to this centre;

- development would contribute to the 'dumbbell' effect by benefiting both CastleCourt and Victoria Square, encouraging pedestrian flow between the two;

- there is a risk of 'market confusion' over what scheme has priority. Market activity would be diluted and a confused situation would arise for occupiers, affecting value and viability if both options were progressed together.

4.23 In conclusion, therefore, this strategy supports complementary retail development in the Victoria Square area and in the North East Shopping Quarter in the short to medium term – the former targeting higher and quality retailers, whilst the latter targeting more at the lower end of the retail sector. CastleCourt would continue to perform in the middle ground.

4.24 The South West Shopping Quarter can continue to provide more specialist retailing, whilst the Cathedral Quarter in the North East Quarter of the shopping core could in time appeal more to independent retailers attracted by a ‘bohemian’ feel to the area. It is also our view that in time Donegall Square could move up-market in terms of retailers at ground floor level, once the buses are removed from the Square and substantial public realm improvements are in place.

4.25 The Square 'connects' the main business quarter with the core shopping area. Similar locations in other cities, for example Upper King Street in Manchester, has by virtue of its location and character attracted
‘designer’ fashion retailers, including Armani, Vivienne Westwood etc. In time Donegall Square could do the same.

Office/Business

4.26 Section 3 provides a summary analysis of the Belfast City Centre office market.

4.27 The principal issue for the City Centre relates to providing for occupiers that would normally seek a City Centre location and who require large floorplate accommodation – financial institutions, professional services and major public sector occupiers. It is with these occupiers in mind that the principle of consolidation should be applied and new office development targeting City Centre occupiers should be concentrated where possible within, or on the edge of the existing business district. This reinforces synergy with the shopping core and adds to the overall vitality of the City Centre. Care is required to ensure that new office development on the edge of the City Centre does not simply relocate occupiers out of the Core.

4.28 Nonetheless it is appropriate for the City to respond to the demand for ‘business park’ – campus style development by providing appropriate locations for these developments. Similarly, it is appropriate to provide suitable sites and accommodation for science, high technology and research and development occupiers. In many instances this will mean reinforcing links to the Universities. Many UK cities are focusing on ‘e-campus’ and science park investment. For example Liverpool, Manchester, Leeds and Sheffield all have science park proposals at different stages in their gestation.

4.29 In some instances these developments are on the edge of the city centre, but in many cases they are out of centre. The concept of the Urban Business Park is however, taking hold in other parts of the UK – for example North Manchester Business Park in Manchester. This seeks to achieve the qualities of more traditional, greenfield/suburban business parks, but in an urban setting with strong public transport connections and regeneration benefits. In the case of Manchester, strong connections to the City Centre are as important as motorway connections. Belfast must ensure that it is at the vanguard of this ‘new’ development form. Indeed the development of the Gasworks site has already pointed the way for the City in this regard.

4.30 A successful office market requires rental growth to attract institutional investment. This growth is fuelled not only by demand, but by controlling supply. Care is required not to dilute investment by creating or encouraging too much supply in different locations. This is a particular risk if the public sector is leading the office development market, whether as a facilitator or as an occupier. The aspiration has to be to get not only rental growth in the City Centre office core, but also to attain higher density and quality thresholds which can only be achieved through value generation.

4.31 The untimely promotion of Grade A office accommodation in locations clearly out of centre, for example at Titanic Quarter could dilute the market, creating unhealthy competition, undermining rental growth and value to the detriment of density and quality in the City Centre. The City Centre office supply needs to be carefully controlled through planning, but also through the regeneration activities of DSD.

4.32 In order to protect the core, appropriate sites within the City Centre, which have the potential to capture market investment, such as the completion of Lanyon Place and the Grosvenor Road site, must be
facilitated. A high quality office product, which reinforces office development in the City Centre, must be promoted on these sites.

4.33 We are aware of aspirations for commercial development on the Grosvenor Road site to the rear of the Great Victoria Street rail and bus interchange. The aspiration here needs to be to create Grade A office accommodation to support the traditional Office Quarter. This should be the priority office scheme (targeting City Centre occupiers) in addition to remaining sites in the Office Quarter and at Lanyon Place. Public Sector intervention will be required to help deliver a scheme of appropriate type, form and quality in the same way that Laganside Corporation helped deliver Lanyon Place. This is addressed later in this document.

4.34 Careful design and implementation of a scheme at Grosvenor Road would tie into the existing business district, relate well to the established ‘entertainment’ district along Great Victoria Street, benefit from a relationship with a major public transport interchange, address this important gateway to the City Centre and bring regeneration benefits to West and North Belfast. Examples of similar schemes in the UK are Brindleyplace in Birmingham and the emerging scheme at York Central in York, though the latter is still at planning stage.

4.35 There is also potential for office development in the Northern Gateway area around York Street and Gamble Street as part of a mixed use environment. This will require careful planning to ensure that it does not adversely compete with the office core, and is expected to be a longer term priority for DSD.

4.36 This area is characterised by disjointed land use and land ownership, a large number of vacant sites of different sizes and the adverse environmental impact of the road and retail infrastructure. It is however an important gateway to the City Centre from the north and as such is significant in terms of wider City Centre regeneration.

4.37 This gateway character, excellent road accessibility, the potential for a public transport node at Gamble Street station, proximity to the Cathedral Quarter and the location of the University of Ulster can all provide an impetus for the area’s regeneration.

4.38 However, care is required in terms of the form of appropriate development and the timing of this for development, particularly for City Centre office use. In terms of delivering new City Centre office development this strategy recommends that DSD prioritise schemes in the office core, Laganside and Grosvenor Road.
4.39 There will nonetheless be a long lead-in time to major new development in this part of the City Centre. The first step is to undertake a detailed masterplan for the area to guide mixed use development and to provide a clear basis for public sector intervention and private investment.

4.40 This masterplan should aim to:

- create a cohesive urban quarter with a mix of uses - residential, commercial offices and supporting facilities;
- create new opportunities for office development that will bring new employment to Belfast and bring opportunities from local residents in north and west Belfast making use of Gateway sites;
- create physical linkages between, through and outwards to encourage physical and social integration with adjoining areas;
- create a land-use pattern that enhances the distinctiveness and vibrancy of the area; and
- create a place of high quality through the design of buildings and public spaces.

4.41 In urban design terms the regeneration of the Northern Gateway should address aspects of the physical environment as follows:

- a comprehensive approach is required to ensure that development is underpinned by the provision of open space and community/retail facilities;
- the area needs to be made more ‘pedestrian friendly’ and properly connected to surrounding nodes of activity;
- a train station at Gamble Street presents a public transport node which can accommodate a higher density of mixed use, particularly commercial development; and
- the land use pattern and urban form needs to address the impact of the road and rail infrastructure through the scale and orientation of buildings and the creation of an appropriate level of enclosure.

4.42 In relation to phasing, residential elements could progress in line with market demand. However, office development should be encouraged to follow on and complement the office core, Grosvenor Road and Laganside office developments. This does not preclude locationally specific requirements, nor suggest a stop should be put on all development, but rather that the emphasis is placed on these other locations as priorities.

4.43 What is required is a strong policy statement from DOE which translates an agreed masterplan into a firm policy context for decision making. BMAP should provide this.
Tourism/Leisure

4.44 Belfast City Centre should be at the heart of the tourism and leisure market for the City and indeed the province. It has a number of significant assets in its heritage and in recent developments, including the Concert Hall and the Odyssey scheme. However, the City Centre still fails to achieve its full potential and in particular is deficient in leisure attractions in the core of the City – alongside and within the shopping centre. The aspiration for a 24-hour City can only be achieved by improving leisure facilities in the heart of the City.

4.45 Whilst the City Centre appears to be well catered for in terms of large anchor leisure attractions in the form of multi-screen cinemas, with the exception of Odyssey there is a quality gap. There may be potential to attract a high quality cinema scheme to the shopping core as part of a mixed use retail scheme, for example in Victoria Square. This should be actively pursued and supported.

4.46 Opportunity also lies in reinforcing the Great Victoria Street Corridor, implementing proposals for the Cathedral Quarter and achieving an appropriate level of other leisure uses within the retail led mixed use schemes, including Victoria Square.

4.47 The Cathedral Quarter has the potential to develop as a creative and cultural quarter in the way that other cities, including Leicester, Sheffield, Bradford, Newcastle and Huddersfield have progressed similar concepts. In Leicester for example, the Council recently has given outline planning permission for a £26m new performing arts complex designed by world-renowned architect Rafael Vinoyl. Work has also just started on the Creative Heartland Incubator Centre (CHIC) which will transform a redundant 1960s office building into a managed workspace of creative small businesses.

4.48 An Arts Centre development in the Cathedral Quarter has the potential to act as a catalyst for levering in significant private sector monies to enable wider regeneration of the Cathedral Quarter to take place. The location of a facility of this nature in an area of high deprivation which abuts the wider North Belfast area which has suffered more than most from the civil unrest over the past 30 years could have substantial regeneration benefits. A major retail led development in this locality would also help as long as it is of an appropriate scale and massing.

Connectivity/Public Realm

4.49 The existing condition and use of the City’s public realm does not fulfil its potential or come close to doing so. Investment is urgently required in order that the economic viability of the City Centre is fully realised. The experience of other cities in the UK shows that carefully structured investment in public open space can play an important part in regeneration and commercial strategies. Manchester is an excellent example of a city using its public realm to stimulate regeneration and ensure maximum benefit from new development.

4.50 The Public Realm Strategy outlines key projects and principles that should be adhered to in order that the public realm can be developed cohesively. However, a number of investments in public realm are considered to be of particular importance and should be given priority. These are closely related to the retail led developments outline above, and are as follows:
• **Donegall Square**

4.51 As identified in the Public Realm Strategy, the importance of Donegall Square cannot be over-emphasised. Currently the building uses and dominance of buses and other vehicles, lead to it isolating the retail core to the north and the commercial district to the south.

4.52 It is proposed that Donegall Square should be restructured and renovated to provide a premier setting for the City’s icon building, integrating activity on each side, through uses and public realm treatment Transport, and particularly the bus usage needs to be addressed in order to reduce severance, improve overall amenity and make the area more pedestrian friendly.

4.53 Donegall Square predominantly lacks vibrancy or quality at the present time. With time however, the opportunity exists to facilitate the growth of high value, niche sector retail around the four sides of the Square, utilising buildings of quality. This would provide a use and quality that would link the commercial district with the traditional retail core and Victoria Square development to the north. In Manchester, Upper King Street has developed in this way, attracting high fashion retailers including, Vivienne Westwood, Armani and Calvin Klein, linking the established retail sector and the commercial business district.

4.54 The design of the public realm should be of the highest quality materials and detailing appropriate to this focal location. Work on Donegall Square would bring significant benefit to the City as a whole. It would address issues of severance and division, whilst creating a natural focus for the City and its civic activities.

• **Royal Avenue/Donegall Place**

4.55 The Public Realm Strategy rightly emphasises the importance of the principle of the Royal Avenue/Donegall Place/Linenhall ‘Spine’ in the City Centre, which requires an appropriate level of treatment – linking spaces and new development. A series of nodes could be established along the route to create high points and emphasise special characteristics. For example, such places could include Castle Place junction. The streetscape should be of the highest quality, promoting a prestige image that supports the proposed building uses. Generous tree lined footways are proposed, in conjunction with reduced vehicular prominence. Obstructions should be kept to a minimum to ensure that the streets fulfil their central function as prime retail environments.

• **High Street/Castle Place/Bridge Street**

4.56 Investment through retail led development in the North East and South East Quarters of the shopping core should be complemented by investment in the surrounding public realm to ensure maximum benefit and synergy between the two schemes. This should focus on the High Street area as the interface between the two schemes, but linked to investment in the Royal Avenue ‘Spine’. It should address east-
west as well as north-south links with Castle Place being a particularly important ‘node’ in the retail core, warranting particular attention.

- **Fountain Street**

4.57 This part of the City Centre functions reasonably well in retail terms. Although there have been retail redevelopment proposals before, this strategy does not attach a priority to major development in this location. Rather, public investment is required in the public realm to support existing retailers and to complement developments in the North East and South East Quarters of the shopping core. A design solution should focus on connecting north-south to CastleCourt and east-west to the new Victoria Square scheme.

- **Connections to Laganside**

4.58 Connecting the City Centre core to the river is a legitimate aspiration which is embodied in practically every document or report. It is a central reason for DSD supporting the prioritisation of Victoria Square for retail led development. This can be helped by appropriate development, but there is need for physical intervention to facilitate crossing of Victoria Street and Oxford Street to the river.

**Reinforcing City Communities**

4.59 Competitiveness and social inclusion are twin elements of the same process, generating mutually reinforcing impacts. Sustainable economic growth is dependent on the eradication of the social and economic inequalities that undermine growth and prosperity. Increased social cohesion, in turn, should support the continuing expansion of the City Centre through a skilled workforce and higher local spending power. The New TSN seeks to address this issue.

4.60 The strategic imperative is therefore to build on existing initiatives to harness City Centre opportunities to drive the regeneration of Belfast’s most disadvantaged communities. The City Centre is Belfast’s most significant labour market. New jobs will be generated by further investment in the City Centre. Responding to the emphasis of national policy that the key route to social inclusion is through employment, a key aim should be to improve the working of the City Centre labour market;

- to support increased competitiveness through a first class cohesive, partnership-based employment service to existing employers and future investors, as a key element of the City Centre’s offer;

- to increase the ability to capture employment opportunities and to enable residents from the most deprived communities to improve their employability, and to access and retain City Centre jobs, in accordance with the Government’s statutory equality obligations; and

- to develop a closer match between current and future needs of employers and the skill development needs of the poorest neighbourhoods.

4.61 There is a need to:
secure maximum integration between the physical renaissance and economic growth of the City Centre, the business support measures targeted on high growth sectors and clusters and focused employability and skills programmes;

deliver additional impacts and outcomes through more intensive approaches to employment and training programmes;

deliver key areas of innovation, including:

- the development of a demand led approach, bringing together the needs of City Centre employers and the needs of workless residents in the most deprived neighbourhoods;

- rolling out best practice; and

- delivering training, employability and employment action integrated within an emerging comprehensive strategy for neighbourhood regeneration.

4.62 It is recognised that one of the constituent attractions to inward investment is the quality of life offered by a City both to its existing and potential inhabitants. There already exists a vibrant student population that is enlivening the City. In addition, increasing the City Centre population of qualified professional/managerial people is important both in terms of labour profile for employers and the expenditure profile. This combination will offer the potential to provide the intellectual capital for both existing and future SMEs and large corporate occupiers in the Commercial District. The key will be to ensure the City has the right quality of ‘offer’ and environment to attract and retain this intellectual capital.

4.63 There is a need for all cities in a competitive environment to create a place where people enjoy interacting at all levels during business, social and leisure time.

4.64 There is a need for a city to ensure the provision of timely, well considered quality projects with appropriate service delivery mechanisms. The medium to long term view should prevail. A ‘make do’ approach would ultimately ‘undo’ future potential.

4.65 If all of the above can be achieved Belfast will be a city that is regarded in a local, regional and international context as a place where people want and need to be.

**Action Areas**

**South East Quarter of the Shopping Core**

4.66 A prerequisite for this work has been the priority given to the redevelopment of the Victoria Square area for retail led development. There are a number of distinct advantages to major retail led development in this location, including:
• a sustainable scheme has the potential to bring forward a substantial quantity of retail floorspace, enhancing the regional role of the City Centre;

• it has the potential to consolidate and enhance the main shopping area, addressing the shopping areas around Ann Street/William Street South and creating a ‘dumbbell’ effect in the city with CastleCourt;

• making the link between the core City Centre and Laganside;

• improving the Chichester Street corridor and improve links to the Cathedral Quarter;

• making a major contribution to the quality and diversity of shopping in the City Centre by generating the potential to introduce new, ‘different’ and quality retailers to the market; and

• economically and socially a scheme in this locality has a number of potential advantages, contributing to TSN and equality objectives.

4.67 In considering a specific development proposal for this area, specific attention should be applied to the following:

• integration/interface with prime shopping area – Donegall Place;

• integration/interface with Bridge Street area to north of High Street;

• linkage/connectivity between shopping area and Laganside/River Lagan;

• potential for major leisure development to diversify activity in the shopping core;

• contribution to quantity, quality and diversity of shopping in the City Centre;

• respect for existing street form and pattern;

• access to public transport

• disabled access; and

• deliverability in required timescales.
4.68 North East Quarter of the Shopping Core including Cathedral Quarter

4.68 Immediately to the north of the Victoria Square area, north of High Street fronting Royal Avenue and linking eastwards towards the Cathedral and Laganside is another quarter which is the subject of a major retail led development. This area has significant heritage merit. It is within a Conservation Area and exhibits a number of listed buildings.

4.69 Within this sector the Cathedral Quarter is an important initiative, spearheaded by Laganside Corporation – but it is slow to ‘take-off’ and needs impetus.

4.70 Cathedral Quarter is one of the oldest districts in Belfast, and is defined as the commercial area located north of Castle Place. The Quarter, comprising approximately 12.1 hectares is bounded by Dunbar Link, York Street, North Street and Waring Street. In February 1997, the then Department of the Environment extended Laganside Corporation’s designated boundary to include Cathedral Quarter. Laganside Corporation is now the public sector agency responsible for the regeneration of Cathedral Quarter.

4.71 The Cathedral Quarter has a diverse economic base, but it has experienced a continuous decline as a commercial and retail centre. The combined impact of the urban character, streets and individual buildings, gives the Cathedral Quarter its special identity. Part of the Quarter is located within the Cathedral Conservation Area, and there are 20 listed buildings in this part of the City Centre.

4.72 Laganside Corporation has prepared a comprehensive framework to secure the physical and economic regeneration of Cathedral Quarter. The strategy provides a ‘Vision’ and co-ordinated plan, to create market confidence and establish a unique quarter for the City Centre.

4.73 The strategy promotes a clear vision for the future of Cathedral Quarter as follows:

“The Cathedral Quarter will become a dynamic and distinctive mixed use, historical and cultural quarter within the centre of Belfast. It will play a diverse and dynamic set of roles, contributing to the economic performance of both the City Centre and wider city region.”

4.74 The intention is for the area to develop a regional and international reputation as:

- a cultural and ‘entrepreneurial’ quarter;
- the City’s specialist retail area;
- a major tourism and visitor destination; and
- a unique example of urban conservation and regeneration.
In implementing the Cathedral Quarter Regeneration Strategy the aspiration is to:

- stimulate and retain sustainable economic activity to maintain the area’s viability;
- attract private sector investment across the office retail, tourism, leisure and residential sectors;
- encourage restaurants, bars and café’s;
- retain and promote the expansion of existing businesses;
- relocate and facilitate the formation of new businesses;
- increase resident and visitor expenditure on goods and services within the area;
- increase employment and wealth creation for the wider benefit of the Belfast City economy;
- enhance the public realm to complement and provide a setting for the historic built fabric;
- share risk with the private sector, particularly through the enabling of development rather than directly undertaking development;
- take advantage of synergy with the existing Arts College;
- encourage good design; and
- encourage the involvement of the voluntary sector.

There is a real opportunity for the Cathedral Quarter to contribute to 24-hour living in the City and to boost leisure provision in and adjacent to the retail core. It can also fulfil the objective of creating a creative cultural quarter for the city. A good example of this is the regeneration of Eastside in Birmingham, where innovation plans are underway for a quarter for new technology, learning and the creative industries, generating thousand of new jobs. Similarly, £5 million is being invested by Yorkshire Forward and Leeds City Council to develop a pioneering Internet quarter in the Holbeck area of Leeds, and in Scotland, Scottish Enterprise is investing £25 million in developing its creative industries, including the development of Pacific Quay as a digital media centre.

However, the initiative requires an icon development in Belfast to focus regeneration activity and stimulate market interest. A City Centre Arts Centre in this location would help to achieve this, but care would be required in its constitution and design.

Moreover, and particularly important an appropriate retail scheme linking through to Royal Avenue would have a significant positive impact on this area, acting as a catalyst for the Cathedral Quarter initiative. An appropriate retail led development would bring the following benefits:

- complement the Victoria Square scheme through providing a ‘different’ type of retail offer;
• enable reciprocal benefit between the two schemes;

• reinforce CastleCourt as a key shopping centre and thus contribute to the ‘dumbbell’ effect;

• stimulate the regeneration of the Cathedral Quarter;

• bring about the reuse of a number of key listed buildings; and

• bring about the regeneration of the tertiary retail sector of the City Centre.

4.79 However, care is required to ensure that any scheme;

• does not prejudice plans for the Cathedral Quarter through inappropriate form and scale;

• respects the fine urban grain of the area; and

• respects the conservation character and listed buildings in the area.

4.80 In considering supporting a scheme in this Quarter DSD need to ensure that the proposals achieve the following:

• respect the Conservation Area character and policy with particular attention to bringing the listed buildings back into productive use;

• ensure proposals are complementary and contribute to the aspirations for the Cathedral Quarter;

• respect the historic street form;

• delivers a scale and form of development appropriate to the character of the area;

• puts in place appropriate connections to the Cathedral, Laganside and the Victoria Square area;

• present an appropriate, high quality frontage to Royal Avenue; and

• is a form of retailing that complements, rather than competes with Victoria Square for occupiers.

North West Quarter of Shopping Core

4.81 This area is dominated by CastleCourt, but the area to the north and west of the CastleCourt Centre needs appropriate investment.

4.82 This is an important area in regeneration terms as:

• it accommodates Smithfield Market;

• it links into the deprived communities of North and West Belfast with incumbent sectarian tensions;
- the old street grid to the north of North Street to the rear of CastleCourt is largely intact and the area has a number of fine Victorian buildings; and

- the area has strong urban design attributes particularly to the north of North Street.

4.83 The future for this area will require careful thought to ensure that the ‘Quarter’ as a whole is regenerated. This area is characterised by a significant number of quality buildings mainly dating back from the nineteenth century, including large warehouses and smaller residential properties. These buildings are typically between 3 and 5 storeys and in the main they are adaptable and robust. Another of the principal characteristics of the area is the tight and intimate street pattern and plot division. Building on these characteristics the Policy Framework envisages a mixed use future for the area.

4.84 We recommend that the preparation of a detailed regeneration strategy for this area to clearly establish the future for this area. This is warranted by the area’s special character and proximity to adjoining deprived communities. This strategy will need to be specific on the appropriate mix of uses, form, scale and massing of new development and ensure appropriate connectivity to the main shopping core, but also to the surrounding residential communities. It is only through this detailed appraisal exercise that the area can be properly planned and, specifically, the quantum and form of appropriate retail development established. This would provide a clear basis for the public sector becoming directly involved in facilitating the delivery of such a concept, which would complement other developments in the City Centre.

4.85 The potential of the strong framework of streets and existing buildings in this Quarter should be harnessed. The fine grain of the streets and plots must be maintained. Library Street and Little Donegall Street are particularly important and North Street and Donegall Street should be developed to facilitate links to the west. Key sites and premises such as St. Patrick’s Catholic Church on Donegall Street, Frames Pool Hall and Clifton Poor House should be retained. Any new development must be compatible in scale and context with the surrounding area.

4.86 Specific attention also needs to be given to the ‘Bank Street’ area and the links through this to CastleCourt, to the Fountain Street area and to Royal Avenue. This area exhibits all the problems associated with a ‘service yard’ to a major covered
shopping centre. A public realm strategy is required for the area.

4.87 Development Proposals should only be considered by DSD in the context of this agreed regeneration strategy for the area and a Development Brief (or series of briefs). In summary any proposal in this area should:

- be mixed use in character;
- respect the existing historic street form;
- respect and, where possible, re-use buildings which give the area special urban form and character;
- ensure appropriate linkages to the adjoining communities to the west and north of the site;
- address connectivity with the heart of the shopping core;
- respect and utilise the relationship with the University;
- find an appropriate location for the Smithfield market;
- avoid large ‘block’ development as seen in the existing CastleCourt scheme – alien to the city and this location; and
- provide good quality, appropriate frontages to North Street as a key east-west link.

South West Quarter of Shopping Core, including Fountain Street

4.88 This area of the City Centre remains vibrant in and around Fountain Street, but there is a need to improve linkages to CastleCourt and to address the Millfield frontage (Refer to Para 4.50). Direct and quality investment in the public realm to reinforce existing investment and to address obvious issues of neglect is required. Improvement of the Chapel Lane/Bank Street area is vital.

4.89 Although this strategy does not advocate the need for DSD to promote nor facilitate comprehensive redevelopment within this quarter of the Shopping Core, it may be that redevelopment proposals could come forward, particularly in the longer term. Should this happen it will be important to ensure that any proposals:

- address the interface with CastleCourt in the Bank Street area;
- address the poor environmental quality of Chapel Lane;
• make a positive environmental/public realm contribution, including the possibility for a new public square in this vicinity;

• ensure appropriate linkages to Royal Avenue/Donegall Place; and

• address the Millfield frontage as a frontage on the important north-south route.
5 Priorities and Delivery

5.1 For Belfast to realise its full economic potential and for it to re-position itself as a leading European city, creating the necessary regeneration benefits for the province as a whole, a number of core interventions need to be made in the City Centre.

5.2 At the heart of this regeneration process is investment in shopping to ensure that the City Centre provides the quantity, quality and diversity of shopping befitting a regional capital. However, the planning of the delivery of this investment, now forthcoming in response to pent-up demand, needs to be carefully orchestrated if maximum benefit is to accrue.

Responsibilities and Delivery Models

5.3 Before considering the core interventions and the prioritisation of projects it is important to be clear on the responsibilities within the public sector. Four principal public sector organisations are engaged in City Centre planning and investment - Department for Social Development (DSD), Department of the Environment (DOE), Department for Regional Development (DRD) and Belfast City Council.

5.4 Moving forward, it is important to be clear and explicit that the role of implementing and delivering the regeneration of Belfast City Centre, using this Framework as a platform, should rest with DSD whilst the ‘Statutory’ land use planning process rests with DoE within the current and emerging planning policy context. In essence, this means that DSD take on a proactive role in driving the regeneration programme forward through commissioning the necessary strategies/studies, design work and utilising its funding and CPO powers and resources. DoE can assist through the preparation of appropriate Supplementary Planning Guidance and planning briefs in the context of the Regional guidance provided by DRD and once the statutory plan (BMAP) is in place. Throughout, the City Council should be wholly embraced in the process as a principal stakeholder. Similarly DRD, through their transport responsibilities, will be essential stakeholders.

5.5 Much can be learned from the role of Laganside Corporation in leading and facilitating regeneration and development and it is important that this experience and expertise is not lost to the wider regeneration effort in Belfast City Centre. In addition, there is much to be learnt from recent experience in the UK. The Development Corporation model is making a return to the regeneration agenda, albeit in a modified form. Also of particular note is the success of the Urban Regeneration Company (URC) model in delivery regeneration. This is being successfully utilised in a number of ‘City Centre’ locations including Liverpool, Sheffield, Hull and Leicester. There is merit in considering the potential for a similar vehicle to drive regeneration in Belfast Centre, providing a focus for private sector participation and investment.

Priorities

5.6 DSD need to be proactive and focused in terms of priorities, learning from the experience of the Laganside Corporation an equally focused approach needs to be adopted in the City Centre. DSD needs to take the lead on delivering a series of core projects and initiatives central to the regeneration of Belfast City Centre. This will involve using DSD’s full range of powers and resources either under the current regime or though a bespoke delivery vehicle along the lines of a URC. Working within the context of BMAP which sets the overall land-use framework and working with DoE this will include
formulation of strategy, masterplans, development briefs and design guidance; co-ordination of development partners; provision of funding to facilitate appropriate development; direct investment in public realm and use of land assembly powers. The following are the core or priority interventions and projects to be facilitated by DSD.

**Victoria Square**

5.7 Victoria Square is already established as a priority for the Government and should be progressed with vigour. DSD are currently in discussions with MDC to secure an agreement to deliver an appropriate proposal. It is beyond the scope of this report to advise on that agreement, but it is relevant to emphasise that care is required to ensure that appropriate pressure is applied to ensure development commences in as short a timescale as possible. It would not be appropriate to hold up every other investment opportunity in the City Centre, supported by this Framework, and which requires DSD’s support, until MDC have developed their scheme.

5.8 It is important, however to be absolutely clear to retailers that Victoria Square is the principal new shopping development in the city centre. There is a need for DSD to be consistent in its approach to the market sector at which it is aimed. This is critical to avoid ‘market confusion’.

**Royal Avenue/Cathedral Quarter**

5.9 This Framework fully supports the early implementation of an appropriate proposal in the Royal Avenue/Cathedral Quarter area of the North East Quarter of the Shopping Core as long as this complements the Victoria Square Scheme and brings significant regeneration benefit to the Cathedral Quarter. An appropriate retail led scheme would also reinforce the ‘dumbbell’ principle of CastleCourt and Victoria Square.

5.10 Thus, because of the complementary and reinforcing nature, the framework recommends that DSD use its vesting powers to assist an appropriate proposal in this location. Moreover, should a scheme in keeping with the heritage of the area and which complements Victoria Square prove unviable, DSD should consider additional support.

5.11 The Cathedral Quarter needs to be given impetus, although a retail scheme in the North East Quarter will help. An Art Centre development would meet gaps in the arts provision, will stimulate the arts and cultural quarter envisaged for this area and contribute to the urban regeneration of the City Centre.

**Public Realm**

5.12 As outlined above, another priority for DSD is to procure the necessary urban design/public realm design work for a number of critical interventions as follows:

- Castle Place/High Street and Bridge Street to ensure maximum benefit from the adjoining retail developments;

- Donegall Square/City Hall - consideration should be given to an international design competition for the square;
- Donegall Place/Royal Avenue and the City’s premier Spine/Boulevard;
- Fountain Street/Queen Street/Castle Street to reinforce the existing shopping environment;
- Chapel Lane/Bank Street to address the links to CastleCourt and the conflicts of use/urban design issues on the south side of CastleCourt; and
- Pedestrian/physical links from the shopping core to the river.

5.13 These interventions would sit within the Urban Design principles set out in BMAP.

Rear of CastleCourt/North Street

5.14 In recognition of the neglected nature of the North West Quarter particularly to the north west of CastleCourt around Smithfield and north of North Street, and of the urban qualities of this area, DSD should commission a detailed regeneration strategy and Masterplan for the area. This should specifically focus on delivering mixed use development respectful of the form and character of the area. The requirements of this strategy are set out in more detail in the previous section.

City Centre Office Core

5.15 DSD need to identify potential sites for office development in the City Centre and focus on helping to deliver the development of vacant sites in the Office Quarter, ensuring an appropriate form, scale and quality of development.

Grosvenor Road Office Site

5.16 DSD must be proactive in facilitating a high quality, office development on the Grosvenor Road site which reinforces the City Centre as the principal office location. Intervention may include assistance with masterplanning to ensure an appropriate form of development as articulated earlier in this strategy, assistance with infrastructure, of remediation and gap funding if necessary.

5.17 By the public sector focusing on these short to medium term intervention and actions, a major transformation of Belfast City Centre can be achieved. The private sector will respond positively to this clarity of focus and intervention by making complementary investment.

5.18 It is not possible, nor is it appropriate for all investment to take place in the city centre at once. Indeed it is not possible for DSD to support every scheme that comes forward. Without being overly prescriptive a degree of sequencing needs to be established, recognising that the regeneration of Belfast City Centre is at least a 15 year programme.
5.19 In particular it is important to avoid ‘market confusion’ which could result in reduced rents, a deflation of value, and in the extreme a consequential impact on the vitality of a particular scheme. This is a particular risk at the present time for the retail developments being proposed, and is particularly pertinent for the Victoria Square Scheme which has DSD support.

5.20 It is therefore important to establish an order of priority in terms of DSD support for development and direct intervention/investment by the Department.

5.21 This Framework propose a broad order of sequencing for DSD intervention and action, categorising intervention into 3 phases – short term (0-5 years) medium term (5-10 years) and long term (10-15 years) as follows:

**Short Term:**

- agree terms and assemble land to facilitate implementation of Victoria Square Scheme;
- work with developer to ensure an appropriate retail led scheme in the North East Shopping quarter and support this scheme as appropriate;
- commission detailed regeneration strategy and masterplan for the North West Shopping Quarter and subsequently establish appropriate Development Briefs for core developments;
- commission detailed regeneration strategy and masterplan for the area around York Street/Gamble Street – the Northern Gateway;
- commission design work and commence implementation of public realm strategy;
- commission/support preparation of detailed masterplan and commercial feasibility study for Grosvenor Road site and commence implementation of scheme with appropriate development partner;
- explore opportunity for land assembly to assist appropriate development in the Office Quarter;
- continue to assist implementation (Laganside Corporation) of Laganside Strategy; and
- continue to assist Cathedral Quarter initiative (Laganside Corporation).

**Medium Term:**

- continue implementation of public realm improvements;
- Victoria Square Scheme up and running;
- completion of a retail scheme for the North East Shopping Quarter;
• commence implementation of strategy for the North West Shopping Quarter – land assembly and other support as appropriate;

• commence implementation of the Northern Gateway Strategy;

• continue implementation of Grosvenor Road Scheme;

• post Laganside Corporation continue implementation of Waterfront investment; and

• continue implementation of Cathedral Quarter initiative.

Long Term:

• major focus on North West Shopping Quarter as final quadrant of shopping core requiring major investment;

• completion of Grosvenor Road Scheme;

• completion of Laganside Strategy; and

• continue implementation of Northern Gateway Strategy

• explore opportunities for major new retail development in the South West Shopping Quarter, if required to complement other investments.

Assessment Criteria for Future Major Development

5.22 DSD (or new delivery vehicle) should have in place a clear protocol for appointing Development Partners and a series of criteria against which future development proposals, as they come forward, can be assessed. The broad context for the submission of proposals will be provided by this City Centre Regeneration Policy Framework.

DSD Support in Principle and Developer Selection

5.23 This Framework identifies priority locations for retail and other development which support the regeneration objectives and priorities in the City Centre. It is anticipated that the DSD, or equivalent would take the lead in facilitating these projects and thus may invite expressions of interest from developers/development consortia in respect of identified opportunities and other opportunities as they emerge in the future, as and when appropriate.

5.24 The first step will often be to prepare a development brief for these opportunities backed by necessary design guidance. In this way, DSD will control how and when development proposals come forward, there will be clarity in terms of priority, and schemes that are proposed will be more likely to address and respect the aspirations of the DSD established in this Framework and in BMAP in terms of quality, content, urban design and other key issues.
5.25 Where potential developers are to be asked to submit proposals, consideration will need to be given to an appropriate shortlist of developers. Departmental officers and partner organisations ("steering group") will have their own views in this respect and third party advice in terms of appropriate potential partners will be invaluable.

5.26 A number of key people within the Department and in partner organisations should be involved in the consideration of development proposals and in the consideration of those developers/consortia to whom detailed briefs in respect of key development opportunities should be issued.

5.27 Once detailed submissions or “unsolicited” development proposals seeking DSD assistance are received, appraisal of the submissions will need to deal with:

- track record of the developer;
- financial backing/capacity to deliver total scheme to required quality;
- vision;
- appreciation of the objectives/role of the proposal in the wider context;
- fit with wider regeneration objectives or development brief where this is in place;
- commerciality/deliverability;
- sustainability;
- regard to Government policy for New Targeting Social Need;
- equality obligations; and
- complementarity with existing schemes/provision.

5.28 Where development proposals are received by the Department, in the absence of any invitation to submit expressions of interest, there should be a two stage assessment process. The first step will be to consider if DSD should support investment in this location or for the purpose envisaged when placed in the context of this Regeneration Policy Framework. The following criteria should be applied:

- does the initiative/scheme comply with the regeneration priorities and principles established in this report;
- would the proposal significantly further the achievement of some or all of the objectives set down in this report;
- is the scheme located in any of the Priority Action areas;
• would the scheme make a significant positive contribution to the commercial well-being of the City Centre; and

• is the scheme likely to complement, rather then compete with other, established priority projects.

5.29 Once DSD decide to support the scheme/project in principle, then it should be subject to the same appraisal process and considered against the same criteria as scheme proposals invited by DSD.

Developer/Scheme Appraisal in Detail

5.30 At a subsequent level of detail – say when developers have been shortlisted or when DSD have resolved to support an unsolicited proposal, criteria which development proposals will need to address will include the following (in addition to those outlined above):

- detail of key personnel from within the development team who will be responsible for the scheme and detail of their relevant experience;

- confirmation of the professional team that would be responsible for taking the scheme forward;

- confirmation of the financial position of the company and proof that sufficient funding is available;

- details of the phasing of proposals (if applicable) and in particular details of those elements which it is considered that the development should be obliged to deliver;

- confirmation of the required target returns and costs to assess the viability of any proposals; and

- details of any minimum land value attributable to the public sector, where this is appropriate.

5.31 Particular attention should be given to planning, design and heritage issues when appraising development schemes. The following criteria should be applied in all instances, but some criterion are more relevant in Conservation Areas, or when the scheme involves Listed Buildings:

- **Respect for the ‘Urban Grain’** – how a scheme responds to and respects the historic street pattern, urban form, character, scale and historic features for a site/location.

- **Impact on townscape** – impact on overall character, form, texture and colour which is a feature of the area in question.

- **Impact on derelict and underused land and buildings** – the contribution to the scheme makes to recycling land/buildings and to maximising the re-use of land and building resources.

- **Density** – the extent to which the scheme achieves an appropriate density of development which contributes to the overall vitality and viability of the City Centre.

- **Street vitality** – the degree to which the proposal would ‘enliven’ the streetscene through appropriate uses/activities at ground floor level and by ‘stimulating’ architectural form and detailing.
• **Contribution to Public Realm** - the degree to which the scheme contributes to the enhancement of the ‘Street’ and public spaces in a manner which ensures that people feel comfortable, safe and secure. New spaces should make a positive contribution to the City Centre Public Space network as outlined in the Public Realm Strategy.

• **Orientation and legibility** – the extent to which the scheme facilitates people’s understanding of the urban landscape and respects/takes advantage of important views and vistas.

• **Conservation impact** – the extent to which the proposals respect Conservation policy, address Listed Buildings and contribution to the overall built heritage of the City.

• **Permeability and connectivity** – the extent to which the scheme facilitates pedestrian movement through it, and between it and the surrounding urban fabric. Any scheme should ‘link’ adjoining parts of the urban fabric.

5.32 In addition, any scheme should be considered in terms of its transport implications as follows:

• **Public transport accessibility** – relationship to public transport infrastructure and facilities and proposals for additional facilities along with impact on modal split.

• **Sustainability** – extent to which the scheme promote sustainable travel - use of public transport, Green Travel Plans, etc.

• **Highway Impact** - capacity of the highway network to accommodate the scheme and the implications of new infrastructure in terms of environment (noise and air pollution) and severance.

• **Parking** – compliance with policy and adequacy of provision, replacement of displaced parking, contribution to overall City Centre parking supply, etc.

• **Servicing** – adequacy of servicing proposals, impact on residential amenity, impact on public realm, etc.

• **Pedestrian and cyclist accessibility** – ease of access and use for pedestrian and cyclist, conflict with vehicular traffic and severance issues.

• **Access for mobility impaired** – provision for disabled users.

5.33 In Section 4, specific criteria have been identified which are locationally specific to the four quarters of the Shopping Core and which should be applied to scheme proposals in those locations.

5.34 It is not possible to be totally comprehensive at this stage – the above acts as a guide. Indeed the preparation of appropriate design guidance and development briefs can significantly ease scheme assessment. In particular, the preparation of a detailed strategy for the North Street area, north of CastleCourt, needs to be explicit about the requirements for future development.
6 Conclusions

6.1 Belfast is at the start of a new era in its evolution. It stands on the threshold of change. It faces not only an immense challenge, but a huge opportunity to redefine its future and maximise its economic and cultural potential. The City Centre needs to lead and dictate this change. This must be recognised at all levels of policy and most importantly it must be at the very heart of BMAP.

6.2 This Policy Framework starts the process of guiding and directing this change. It builds upon the City’s many strengths and takes care to ensure that there is a recognition that only the best is good enough for this City. The temptation to think that any development or investment is good enough must be avoided. Mistakes now will remain with the City for generations.

6.3 The framework recognises the need to establish investment priorities. It is not possible for the public sector to facilitate regeneration in all parts of the City at once, nor it is desirable. There is a need to give a clear message to the market on what the priority developments are and to control development in order to maximise rental growth, thereby making development and investment viable.

6.4 The Regeneration Framework takes cognisance of policy and guidance set down in the RDS, the RTS, opportunities outlined in the BMAP issues paper and the Victoria Square Development Scheme and Brief. It also utilises the wealth of excellent research and studies completed by others over recent months, and in some cases still ongoing.

6.5 The Framework provides a medium to long term, integrated and sustainable strategy which has regard to the provisions and requirements of the Victoria Square scheme. It establishes regeneration objectives for the City based around the four key Quarters of the Shopping Core and five key themes whilst taking into account considerations such as tackling dereliction, conservation and the built heritage, a 24-hour environment and the need for a mix of retail and other uses. Areas and sites are identified for retail, office, residential, tourism and leisure developments which are cemented together through the identification of areas for public realm improvements. The Framework sets down priorities for future development and criteria to assist DSD in assessing schemes when judging whether to support them.