



Housing and
Communities



CENTRE FOR ANALYSIS OF SOCIAL EXCLUSION

Belfast City Story



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Contents

List of Boxes	3
List of Figures	3
About LSE Housing and Communities	5
Foreword and acknowledgements	5
1. About Belfast.....	6
2. History	7
Belfast's Industrial Decline	8
Population Decline and Suburbanisation	9
The Troubles.....	11
The Housing Divide	12
Peace and Recovery	13
Northern Ireland Peace Fund.....	15
Rebalancing the Economy.....	16
Population re-growth and immigration	16
3. Financial crash.....	20
4. Reshaping the Economy.....	23
SME Sector	25
Finance	27
Services	28
Collaboration.....	28
Training	28
Marketing.....	28
City Centre Regeneration.....	28
Upgrading.....	30
The Core: improving retail provision.....	30
Lagan Corridor: the Belfast riverside	32
Culture and tourism	33
Titanic Quarter	36
Northern Ireland Science Park	37
5. Energy and the Next Industrial Revolution	39
Energy challenges and the role of renewables	39
Wind energy.....	40
Tidal energy.....	40
Proposed projects to boost Belfast's Green Industry	41
6. Reorganisation of housing provision, local governance and devolution of powers.....	43
Changes to the Northern Ireland Housing Executive (NIHE)	43
Local government reform	43
Devolution from Westminster to Northern Ireland.....	45
7. Social inclusion	46
Economic deprivation and inequality	46
Education	48
Welfare reform	51
Demographic trends and implications for social inclusion	52

Sectarian and racial tensions	53
8. Neighbourhood and community projects.....	55
9. Concluding thoughts	58
Bibliography	61

List of Boxes

Box 1: Giro d'Italia 2014.....	35
Box 2: Why capturing methane from landfill matters	41
Box 3: East Belfast Network Centre – Templemore Avenue	56

List of Figures

Figure 1: Map of Ireland and Northern Ireland	6
Figure 2: Timeline of important events in Belfast's History.....	7
Figure 3: Percentage of workforce in manufacturing employment, Belfast (1951 – 1991)	8
Figure 4: Population decline, Belfast (1951-1990).....	9
Figure 5: Trends in Annual Total Net Out-migration in Northern Ireland (1973 – 1990)	10
Figure 6: Belfast's suburbanisation: City and Metropolitan Area population (1951 - 2011).....	11
Figure 7: Belfast population by religious affiliation (1861 – 2011).....	13
Figure 8: Population Change - Belfast (1981-2013)	17
Figure 9: Northern Ireland migration trends (1991 – 2010).....	18
Figure 10: Northern Ireland Worker Registration Scheme Applicants by Age (May 2004 to March 2011).	19
Figure 11: GVA and GDP Growth (%) in Northern Ireland, UK and Republic of Ireland (2008 – 2011) 20	20
Figure 12: Claimant count rate	21
Figure 13: Youth claimant count rate in Northern Ireland (aged 18 to 24).....	21
Figure 14: Redundancies in Belfast as a % of Northern Ireland total	22
Figure 15: FDI businesses by Belfast regions	23
Figure 16: Assisted investment by parliamentary area (£m)rea (£m)	24
Figure 17: Registered businesses by employment size band, March 2014	25
Figure 18: Belfast number of businesses by employment size band (2014)	26
Figure 19: Top ten industries in Belfast by number of SME businesses (2014).....	26
Figure 20: SME index of Belfast and Northern Ireland	27
Figure 21: Victoria Square, Belfast.....	29
Figure 22: Donegall Place – City Hall.....	31
Figure 23: The River Lagan.....	32
Figure 24: Full-Time Equivalent Jobs Sustained by Tourism in Belfast	33
Figure 25: Belfast tourism numbers and spend (2006 – 2012).....	34
Figure 26: Titanic Belfast.....	37
Figure 27: Belfast Met College, Titanic Quarter.....	37
Figure 28: The Innovation Centre, the Northern Ireland Science Park.....	38
Figure 29: Percentage of electricity generation accounted for by renewables (2012)	39
Figure 30: Map of new Belfast Council boundaries - shaded areas show new areas under the Belfast jurisdiction	45
Figure 31: Table showing the levels of deprivation in Belfast compared with Northern Ireland.....	46
Figure 32: Economic Activity (2012)	47
Figure 33: Multiple deprivation measure rank	48
Figure 34: Northern Ireland GCSE results	49

Figure 35: Percentage of School Leavers in Northern Ireland achieving 2+ A Levels Grades A*-E (including equivalents) 2010/11	50
Figure 36: School performance in Belfast, Northern Ireland, and the United Kingdom	50
Figure 37: Belfast population re-growth.....	52
Figure 38: Religion in Northern Ireland by percentage (1981 - 2011).....	53
Figure 39: Components of expected population change (2011 – 2021)	53
Figure 40: Racially motivated incidents in Northern Ireland (1996 - 2013).....	54
Figure 41: Connswater Community Greenway.....	56

About LSE Housing and Communities

LSE Housing and Communities is a research unit within the Centre for Analysis of Social Exclusion (CASE) at the London School of Economics led by Professor Anne Power. CASE is a multi-disciplinary research centre which focuses on the exploration of different dimensions of social disadvantage, particularly from longitudinal and neighbourhood perspectives, examining the impact of public policy. We aim to understand the social dynamics of disadvantaged neighbourhoods; promote models of housing and neighbourhood management; develop ways to support community and resident self-help action, especially in social housing areas; and shape government policy.

Foreword and acknowledgements

La Fabrique de la Cité, a French foundation sponsored by Vinci, funded LSE Housing and Communities to produce seven updated city reports on Belfast and six other European cities, following our initial reports in 2007. The financial crisis, Eurozone troubles and six-year recession have changed the fortunes of these hard-hit, former industrial cities yet again. These seven stories are up-to-the-minute, grounded evidence of the capacity of cities to recreate themselves as the Phoenix. Each city story is unusual in focussing on a single city and looking in depth at how it survives and thrives, or struggles.

The reports draw on the earlier work of Jörg Plöger and Astrid Winkler who wrote the original city reports published in 2007, and we owe a deep debt of gratitude to them for their outstanding research, their meticulous evidence and their direct accounts of visits to the sites. We revisited all the cities several times since 2008, and this report is based on visits to Belfast and interviews with city stakeholders. It also draws on previous research, city reports and wider evidence. We want to thank all those we met and interviewed, the projects we spent time in, all the residents, officials and programme leaders who shared their insights. In particular we thank John McGrillen, Clare McKeown, Claire Patterson. Without their input, the reports would not reflect the dynamic reality of changing cities.

The majority of images in this report have been taken by the authors. Where other images have been used, copyright permission is being sourced. **We fully accept responsibility for errors and omissions and welcome feedback on any of the evidence that needs expanding, updating or correcting.**

1. About Belfast

Belfast is the capital of Northern Ireland, a province of the United Kingdom and a devolved region or country within the UK, like Scotland and Wales. Northern Ireland has unique governance arrangements, and is part of the island of Ireland. In 2013 the city was home to 281,735 people, an increase of nearly 2.3% since 2003¹. Belfast is situated within the wider Belfast Metropolitan area which has a population of 673,800². This includes Belfast, Carrickfergus, Castlereagh, Lisburn, Newtonabbey and North Down. This represents over one third of the population of Northern Ireland in 2013 which totalled 1,829,700 people³.

Figure 1: Map of Ireland and Northern Ireland



Source: Lonely Planet

Belfast dominates Northern Ireland economically and politically, as the regional capital. From April 2015 local government reforms will see Belfast City Council extend its geographic boundaries to take in around 53,000 additional residents and 21,000 more households. The reform will also transfer powers from central government departments to local councils, including planning, urban regeneration and community development, local economic development, local tourism as well as introducing a new power of community planning. These powers all became devolved functions within the Northern Ireland government when it was established in 1998.

¹ NISRA, Mid-Year Population Estimates; Census. 2013

² Centre for Cities, 2014.

³ NISRA, Mid-Year Population Estimates. 2013

2. History

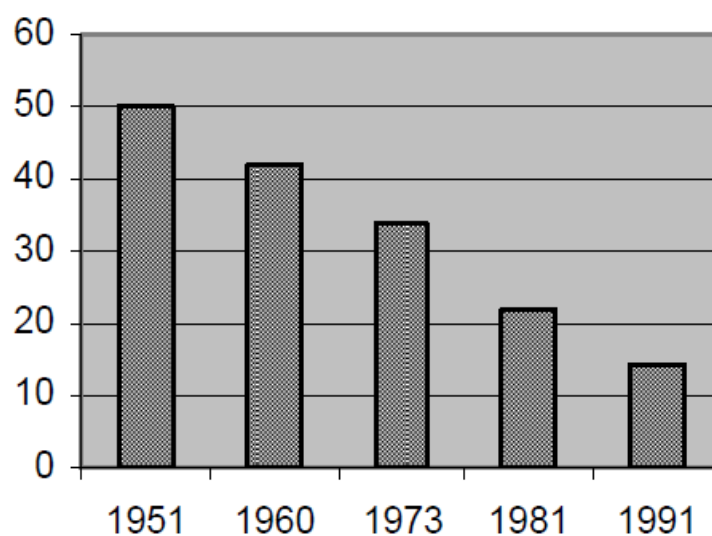
Figure 2: Timeline of important events in Belfast's History

1177	Castle built at the current site
17 th c.	Protestant settlers brought in from Britain (mostly Scotland) in order to gain control over rebellious Ulster, a province of Ireland
1603	Town of Belfast founded under leadership of Sir Arthur Chichester (Baron of Ulster from 1613)
1750s	Start of linen production - reaches peak in 1777 but continues into 20 th century
1801	'Act of Union' with Great Britain (England and Scotland) and all of Ireland
1845	Queen's University Belfast founded
1862	Harland & Wolff shipyard founded
1888	Belfast received city status
1906	City Hall completed
1910	Titanic built in Harland and Wolf dock, Belfast, the largest ocean-going liner ever built
1912	The Titanic sets sail from Belfast
1912-1914	Dispute over Home Rule for Ireland between Unionists and Nationalists
1920	Cycle of sectarian violence in Belfast. 465 people, 90% civilians, died between 1920-1922
1921	Ireland divided by Government of Ireland Act (1920) into the Irish Free State (26 southern Ireland provinces) and the province of Northern Ireland as part of the UK
1921	Establishment of a Northern Ireland Parliament at Belfast City Hall built as a miniature replica of Westminster.
1932	Stormont building, a miniature replica of Westminster is completed and Northern Ireland Parliament meets here
1939	Shorts Brothers and Harland and Wolff begin production of aircraft for use in World War II
1941	Population peak in Belfast
1968	Slow decline of major industries – ship building and textiles 'The Troubles' break out following violence at Civil Rights march in Derry
1972-1999	Northern Ireland under 'Direct Rule' of Westminster
Mid 1980s	Peak of crisis due to industrial decline and opposing violent conflict as paramilitaries gain control
1989	Laganside Redevelopment Corporation founded
1994	Paramilitary ceasefires
1998	Good Friday (Peace) Agreement between opposing political parties and British government and Northern Ireland Act
1999	End of Direct Rule and re-installation of Northern Ireland Assembly in Stormont
2002	Titanic Quarter redevelopment begins
2003	Launch of Belfast State of the City initiative, Belfast Masterplan and the <i>People and Place – A strategy for Neighbourhood Renewal</i> policy.
2004	Launch of Belfast City Council's Renewing the Routes project (awarded the British Urban Regeneration Association (BURA) award for Best Practice in Regeneration in November 2009)
2005	IRA declares total end of armed struggle
2008	Victoria Square shopping mall in city centre opened – wins major awards
2009	Tall Ships Atlantic Challenge reaches Belfast
2011	MTV European Music Awards held in Belfast in November 2011
2012	Launch of Titanic Belfast Signature Project – Centenary of the sinking of the Titanic
2014	Giro d'Italia visits Northern Ireland; Local Elections held for 11 new Councils in Northern Ireland, as part of local government reform
2015	Reform of Public Administration implemented

Belfast's Industrial Decline

The worldwide economic recession of the 1930s badly affected Belfast's export-dependent economy. During World War Two Belfast was a target for German air raids, due to its shipbuilding and engineering industries. Although Belfast enjoyed a brief post-war boom, the city began to decline earlier than most Western European industrial cities. Belfast's linen industry (the city was once known affectionately as 'Linenopolis') was among the first to decline in the 1950s, followed by shipbuilding in the 1960s⁴. During the 1960s, 26 per cent of all manufacturing jobs were lost. Most job losses in Belfast from 1973 to 1991 came from crises in large industrial companies like Harland & Wolff (shipbuilding), Mackie's (engineering) and Shorts Brothers (aircraft manufacturing)⁵. From the early 1970s, Northern Ireland had the UK's highest unemployment rate, peaking in Belfast at 17 per cent in 1987⁶.

Figure 3: Percentage of workforce in manufacturing employment, Belfast (1951 – 1991)



Source: Plöger 2007

During this period, Belfast's severe employment losses were a precursor of the dramatic global economic restructuring that was under way and coming to Europe. It fitted with the trends in many of Europe's former industrial cities.

By the 1970s, manufacturing decline could no longer be offset by service and public sector growth and unemployment soared. Unemployment was particularly concentrated in the working class areas of East Belfast where shipping-related jobs were lost while middle-class areas to the South were less affected by the crisis⁷. A high proportion of households became dependent on benefits and the proportion of long-term unemployed among those without work reached 50 per cent during the 1980s, almost double the

⁴ Hart, 2006.

⁵ Hanna, 1999.

⁶ Borooah, 1998, p. 273.

⁷ Hart, 2006; OECD, 2000, p. 20; Leonard, 1998.

UK average⁸. Until the early 1990s, Northern Ireland ranked among the 25 per cent poorest regions in the whole of the EU⁹.

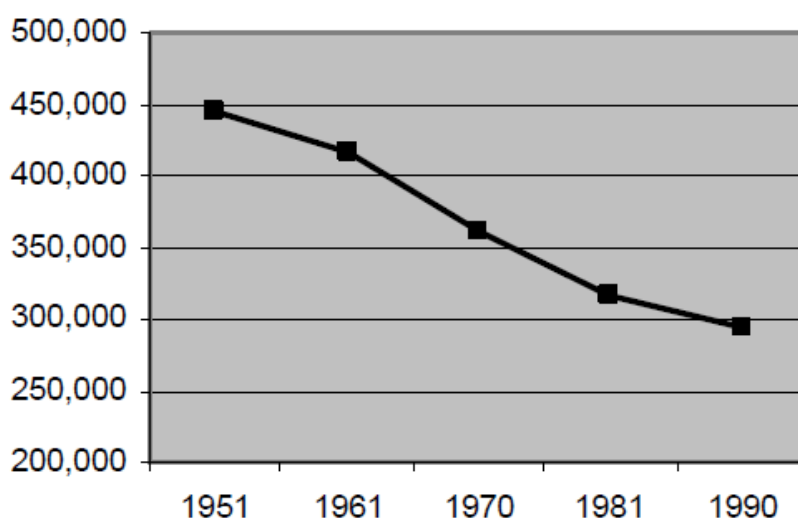
One outcome of this industrial decline was that Northern Ireland and Belfast both became heavily dominated by public sector jobs during this period (a trend that would continue following the peace process). This was partly due to the security jobs and the concerted attempt to create equal opportunities for both communities. Almost three quarters of public sector jobs were located in the greater Belfast area, partly in order to even up the skewed overall employment patterns in industry, services and professions that had traditionally favoured Protestants.

Suburbanisation also contributed to Belfast's industrial decline - a process which emerged from the 1950s. Due to the sectarian violence that dominated inner-city Belfast, many companies chose to locate in industrial estates outside the city boundaries.

Population Decline and Suburbanisation

During the second half of the twentieth century, Belfast suffered from a sharp population decline from a late 1940s peak of 444,000 inhabitants. The most dramatic decline occurred during the 1970s and 1980s. Although other UK cities such as Liverpool and Glasgow also experienced steep declines over this period, Belfast saw one of the most dramatic population falls among European cities¹⁰.

Figure 4: Population decline, Belfast (1951-1990)



Sources: NISRA, Plöger 2007

This decline was driven in part by a general exodus from Northern Ireland caused by a decline in manufacturing employment and later, by escalating sectarian divisions. During the 1970s and 1980s, Northern Ireland experienced a consistently large decline as a result of net outward migration. For

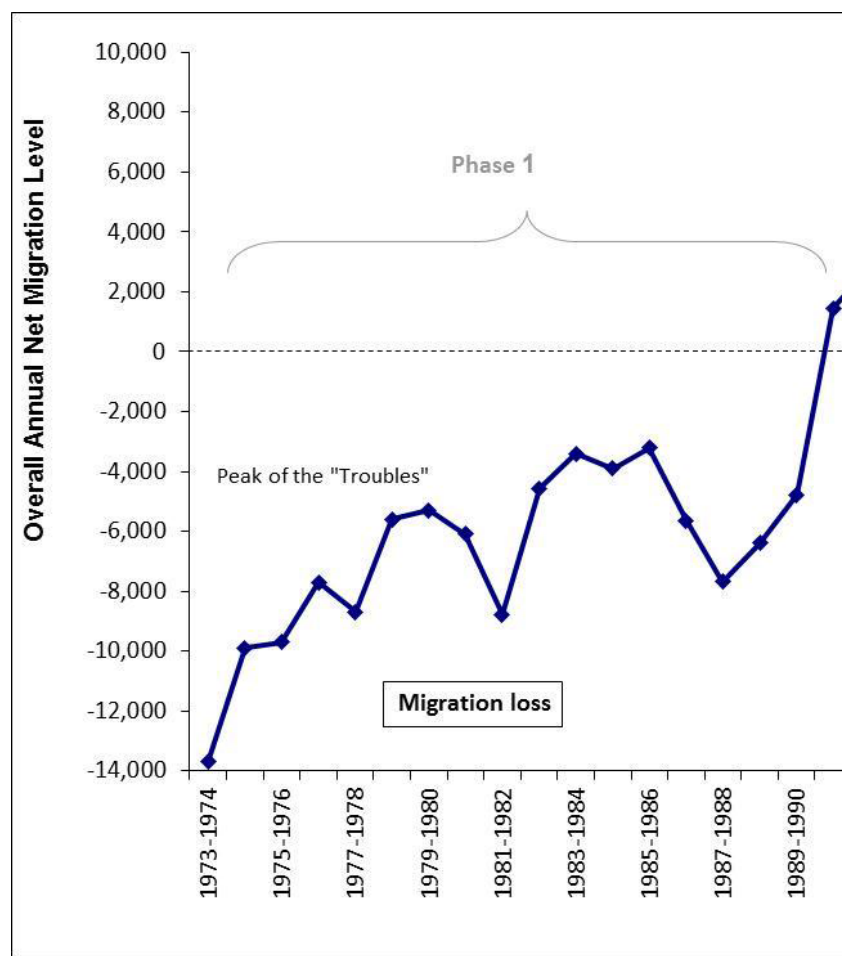
⁸ Gaffikin and Morrissey, 1999a; 1999b.

⁹ OECD, 2000.

¹⁰ Ploger, 2007.

example, in 1974, Northern Ireland had a negative net migration of 13,700, and even by 1989, this figure was still as high as 4,800¹¹.

Figure 5: Trends in Annual Total Net Out-migration in Northern Ireland (1973 – 1990)



Source: Northern Ireland Assembly 2012

Belfast suffered during this period from the migration of many of its residents to the city's suburbs. The impact of the Troubles on quality of life and the shortage of well-paid jobs meant that more highly skilled workers tended to leave Belfast, and the working class inner areas of the city became more dominated by worklessness. Middle class residents moved to the suburbs to avoid the sectarian divisions and insecurity of the city centre.

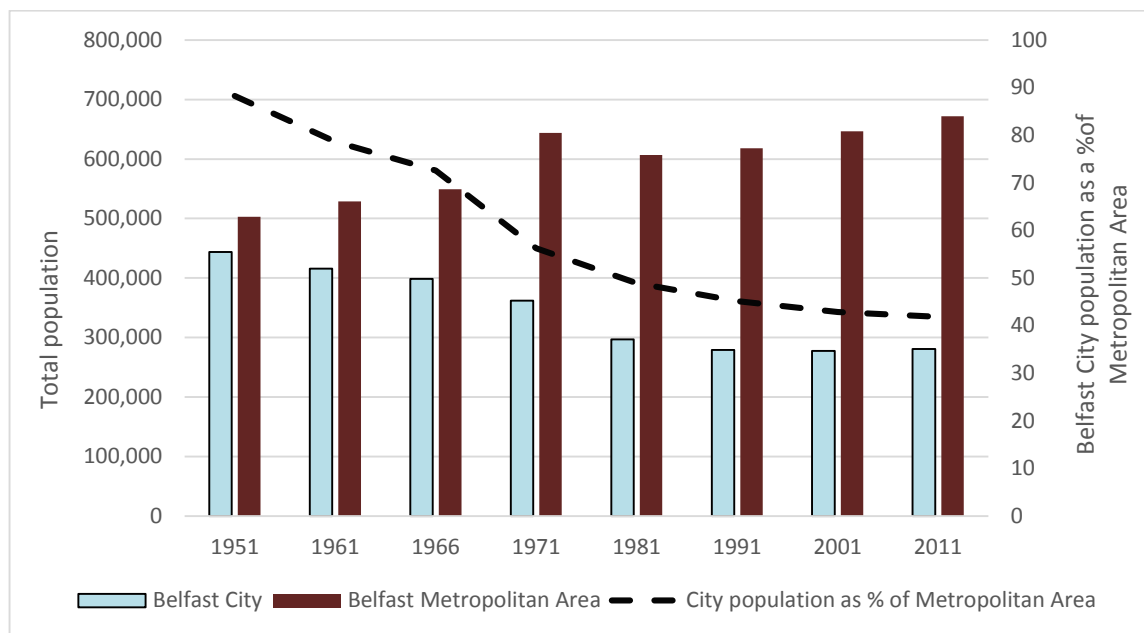
The extent of suburbanisation around Belfast was exceptional. Between 1951 and 1991 the City of Belfast lost about 205,000 inhabitants, while the adjacent suburban counties grew by about 237,000. Planning policy reinforced this suburbanisation; for example, the 1964 Regional Plan for Northern Ireland provided for peripheral growth poles and new towns¹², as well as improvements to road infrastructure such as new motorways¹³.

¹¹ Russell, 2012.

¹² Morrison, 2006.

¹³ Smyth, 2006.

Figure 6: Belfast's suburbanisation: City and Metropolitan Area population (1951 - 2011)



Source: Census (1951- 2011)

Suburbanisation was followed by commercial developments outside the city centre that sought to cater to the purchasing power of the middle-classes. During the 1970s, Belfast showed the highest rates of retail decentralisation in the UK.

However, Belfast was poorly equipped to cope with these trends of suburbanisation and decentralisation and remains so today. Its public transport system is sparser than in other UK cities, is poorly organised and is in need of modernisation. All of this has made the city one of the most car-dependent metropolitan areas in the UK and Western Europe - yet more than a third of Belfast households (38%) do not have access to a car, thereby exacerbating social inequalities.¹⁴

By the early 1990s, news was beginning to leak out that there was interest in attempting to negotiate a ceasefire. The signing of the 'Good Friday' or 'Belfast Peace Agreement' in April 1998 marked the official end of the Troubles. This breakthrough raised hopes and expectations for rebuilding the fortunes of this once-wealthy city.

The Troubles

It would be impossible to understand Belfast's recent history without placing it within the context of the sectarian violence that occurred between the Catholic and Protestant populations in the latter half of the twentieth century. Until the late 1960s, religious tensions in Northern Ireland were visible in sectarian marches and in sporadic violent outbursts. The so-called 'Troubles' entered a new and far more violent phase in the late 1960s and only ended with the 1990s peace process. In 1969, the IRA started a substantial Republican campaign against what they called the British military occupation of Northern

¹⁴ McEldowney et al 2003; Smyth 2006, 100.

Ireland. The Republicans had never accepted the UK's claims to the province of Northern Ireland as part of the UK.

The sectarian tensions that drove the Troubles came to a head when civil rights abuses, gerrymandering of voting boundaries to secure Protestant majorities, discrimination in job hire and violence against civil rights demonstrators caused mass demonstrations.

Initially, UK troops were welcomed as protection against sectarian attacks. Within a few years that changed; the key catalyst for this change in perception was the killing of 13 Catholic civilians by members of the Parachute Regiment at 'Bloody Sunday' in 1972.

The British government responded to the conflict by increasing its military presence. The 1972 killings in Londonderry stand out as the turning point in the long-run conflict which provoked frequent violent clashes, murders and a state of siege in the city of Belfast. That year, the UK government suspended Northern Ireland's parliament at Stormont and imposed 'Direct Rule'¹⁵.

Bombing attacks by the IRA focused on central Belfast, which was regarded by the IRA as a legitimate economic target in the 1970s and 1980s¹⁶. Many areas became insecure and some, including most of central Belfast, were effectively turned into 'no-go zones'. Vulnerable areas were cordoned off, streets were barricaded and military posts and checkpoints occupied key positions.

The bombing campaign by the IRA spread to England. Both Manchester city centre and central London were bombed. Margaret Thatcher, the British Prime Minister, narrowly escaped a direct bomb attack in Brighton. One of her senior ministers and the British ambassador to Ireland were both killed in the sectarian violence. During the three decades of conflict over 3,600 people were killed and 40,000 injured; two thirds of victims were civilians.

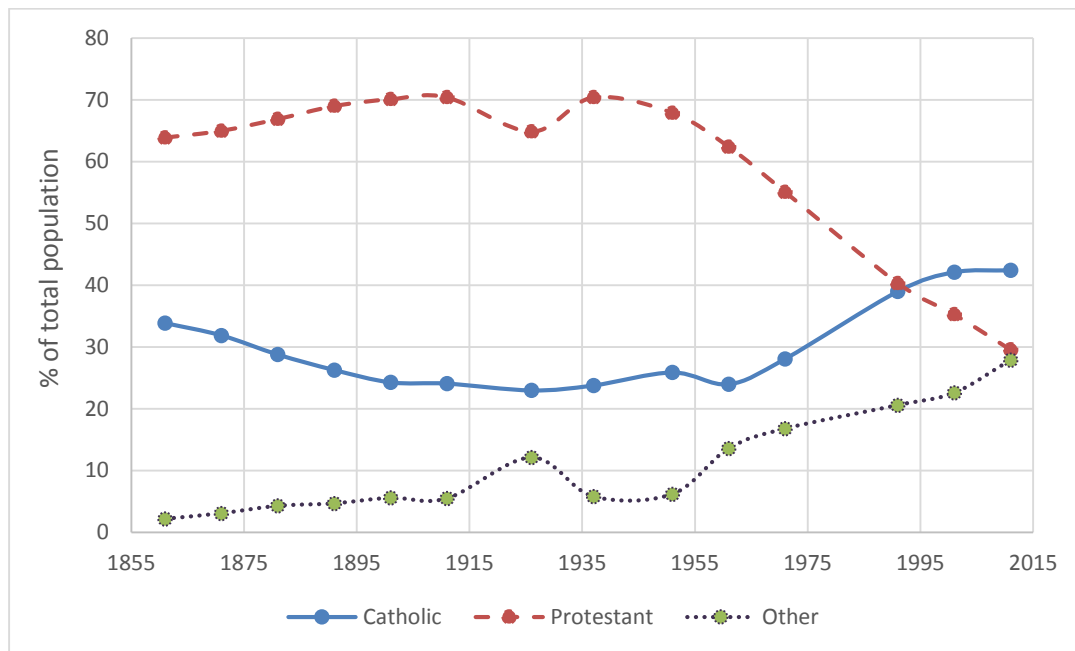
The Housing Divide

In the 1960s unfair housing allocation processes helped to fuel civil disturbances and housing became an extremely contentious issue in Northern Ireland. This was partly due to the strong area-based sectarian divisions in housing, but also exacerbated by the small and often segregated nature of much of Belfast's traditional, unmodernised housing stock. In the past, Councils played a big role in building and allocating council housing and were dogged with problems of sectarian tensions. Because historically the country's Protestant population was larger than the Catholic one, more of its councils were dominated by Protestant council leadership. This often resulted in preferential access to council housing in these areas for Protestants. Demographic shifts added to the tensions. The post-World War Two Catholic population grew rapidly while the Protestant one declined. This shifted the boundaries between the two communities, making the allocation of council housing both more contentious and more vital to the growing Catholic community.

¹⁵ Knox and Carmichael, 2006, p. 945.

¹⁶ OECD, 2000.

Figure 7: Belfast population by religious affiliation (1861 – 2011)



Source: NISRA, Census 1861 – 2011

As a result of these tensions, in 1971 the British government created a unitary Northern Ireland Housing Executive (NIHE), directly under the Housing Corporation and the British government in order to take council housing out of local government hands. It invested a very large amount of money into demolition of unfit housing, house building and rehousing communities leading to more housing being destroyed through demolition and rebuilding than bombing. One result of the rehousing process in the 1970s was that as people were moved into new communities, they often chose to move to areas dominated by their community, as they felt safer. De facto, this increased segregation. Many areas of traditional Belfast became less mixed as a result. The east of Belfast is predominantly Protestant, and the West largely Catholic.

Areas where the two communities share boundaries are called ‘interface areas’. In the most segregated areas, so-called ‘Peace Lines’ have formed a physical divide between Protestant and Catholic neighbourhoods. Many of these persist today.

Peace and Recovery

The peace process of the mid to late 1990s was a catalyst for change, activating a whole range of recovery projects and initiatives which preceded the 2007 crash, survived it, and continue today. The first regeneration efforts were made in the 1980s with Belfast Action Teams, and then the ‘Making Belfast Work’ programme in 1988.

The Belfast Urban Area Plan in 1990¹⁷ laid out the focus of intervention for policy-makers and identified three major tasks for recovery:

- strengthening the city's role as a regional centre for Northern Ireland;
- creating a physical environment and framework for social and economic activity to improve urban living;
- facilitating an efficient, economic and orderly pattern of development.

Two of the main initial regeneration projects were the Laganside redevelopment, a recovery plan for the river Lagan, and the revitalisation of the city centre, which had suffered severe, bombing. These developments greatly facilitated the peace process by introducing new forms of partnership and breaking down barriers by creating 'neutral' zones which had previously been virtually sealed off and now became open to all communities.

Important steps towards rebuilding Belfast were taken during this time of violent conflict including:

- significant improvements to public housing by the Northern Ireland Housing Executive;
- major infrastructure improvements in roads, railway, energy supplies and telecommunications, including greatly improved links to Dublin, the capital of the Republic of Ireland;
- regeneration of the Port of Belfast by the Belfast Harbour Commissioners and its modern extension towards the sea;
- large-scale regeneration of the Lagan riverside as a Northern Irish version of a government-sponsored Urban Development Corporation.

The peace process catalysed substantial support for and investment in city rebuilding. A number of important projects have developed since, building on the city centre revitalisation and upgrading the public realm. These include:

- the transformation of the city's Cathedral Quarter into a magnet for arts-related activities using its old warehouse and workshop buildings;
- a new development in the Titanic Quarter within the old Belfast docks which now serves as a major tourist attraction and caters to the city's growing high-technology and renewable energy sectors;
- the Connswater Community Greenway - an imaginative environmental reclamation project along the famous central and inner Belfast canal/river system celebrated in the songs of Van Morrison who grew up there. It involves cleaning the polluted water, planting native waterside vegetation, creating an attractive foot and cycle path right through the city;
- a major landfill reclamation at Belfast's North Foreshore on the edge of the city overlooking the estuary. The project has high environmental ambitions, already reclaiming escaping methane

¹⁷ OECD, 2000.

from the site for energy purposes, and planting the landfill site to turn it into a national environmental treasure.

Northern Ireland Peace Fund

From the start of peace talks in the late 1990s, Northern Ireland and Belfast both benefitted from substantial EU funding. During the peace agreement, the EU agreed a special investment fund (PEACE) for Northern Ireland which would encourage community relations projects. It was mainly aimed at supporting the development of open spaces where communities could come together to foster peace and reconciliation. The initial support lasted from 1995 to 2006 and amounted to a total of €1,822 million. It has since been extended in several phases.

In 2005, the EU agreed to a further programme of financial support with the aim of reinforcing progress in Northern Ireland towards a peaceful and stable society (PEACE III). The fund covered the period 2007 to 2013 and was primarily financed by the EU (€225 million) along with further national contributions (€108 million). It sought to carry forward some of the key work of the previous EU peace funds with a renewed emphasis on supporting intercommunal reconciliation. Peace funding has supported a number of vital community initiatives in Belfast, including:

- the GROW Project: involving the development of a community garden within the Waterworks Park- an interface area of Belfast that is marked by high peace fences and has a history of pipe and petrol bombings. The project has seen high engagement among local residents and has contributed to a decline in violence in the park.
- The REAL Project: steered by residents from both sides of the sectarian divide in the areas of New Lodge and Mount Vernon. This project has established joint tours of famous inner city sites, and increased intercommunal communication. A street party was held for all children from the area on the interface at the Duncairn Gardens.
- Local Area Networks- a variety of intercommunal projects that have helped to develop health and wellbeing projects throughout the city and have created shared spaces for the safe interaction of Belfast's different communities¹⁸.
- The Corrymeela centre outside Belfast provides facilities where inter-communal reconciliation can occur. In 1997 it was awarded the Niwano Peace Prize for its work.
- Mediation Northern Ireland- a third sector organisation that promotes mediation between divided communities within the province. Their success was illustrated when they were brought over to the Lancashire mill towns in the wake of riots in 2000 to assist with cross-community mediation.

The EU's upcoming Peace IV fund opened for applications in the summer of 2015.

¹⁸ Belfast City Council, 2010.

Rebalancing the Economy

In the decades preceding the financial crash of 2008, Northern Ireland became over-reliant on the public sector - shaped not only by steep industrial decline but by 30 years of sectarian violence and the associated security problems. In 2007 the percentage of Belfast's employees working in the public sector (35%) was higher than that in Northern Ireland (31%) and substantially higher than the average in Great Britain (23%)¹⁹.

Following the Peace Agreement in 1998, special public funds, both British and EU, became available to help the transition to peaceful self-government and local economic development. To compensate for the impact of civil disorder, Northern Ireland's industrial sector received far higher subsidies from the British government than any other region of the UK²⁰. There was also considerable duplication in public appointments in order to represent all sections of the still divided communities. In addition, local authority and parliamentary areas were smaller, entailing more elected officials making decision-making and co-ordination difficult and costly. Northern Ireland and Belfast have been described as "over governed and under managed"; Professor Michael Parkinson has also highlighted the challenges that remain with Belfast's governance and decision-making system²¹. Due to these difficulties and the progress needed in order to "hold the peace", extra public support was justified.

Despite the challenges private investment gradually took off; as the private sector grew, along with wider economic growth, there were signs that the balance was shifting. Prior to the 2008 recession Belfast was one of the fastest growing regional economies in the UK. The city experienced extraordinary growth in the late 1990s and early 2000s with unemployment rates dropping by 75% between 1991 and 2007²². Before the recession hit, Belfast had the fourth highest employment growth out of 64 UK cities - a growth of 6.5% or 18,000 job gains from 2006 to 2008²³.

Population re-growth and immigration

One remarkable proof of Belfast's new found resilience following the Peace Agreement was that its population, following decades of decline, began to grow again. The city's population decline began to slow following the peace process and finally registered new growth in 2005.

¹⁹ Northern Ireland Census of Employment 2013; ONS, Annual Population Survey 2007.

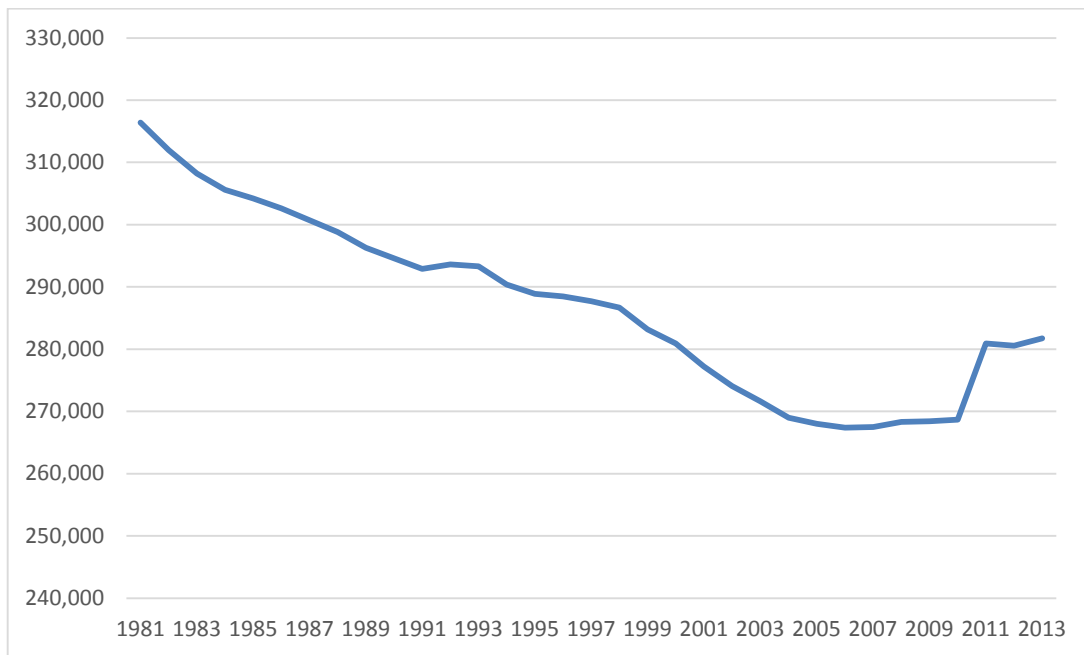
²⁰ OECD, 2000, 23.

²¹ Parkinson, M 2014

²² McGrillen, J. 2011.

²³ Centre for Cities, 2010.

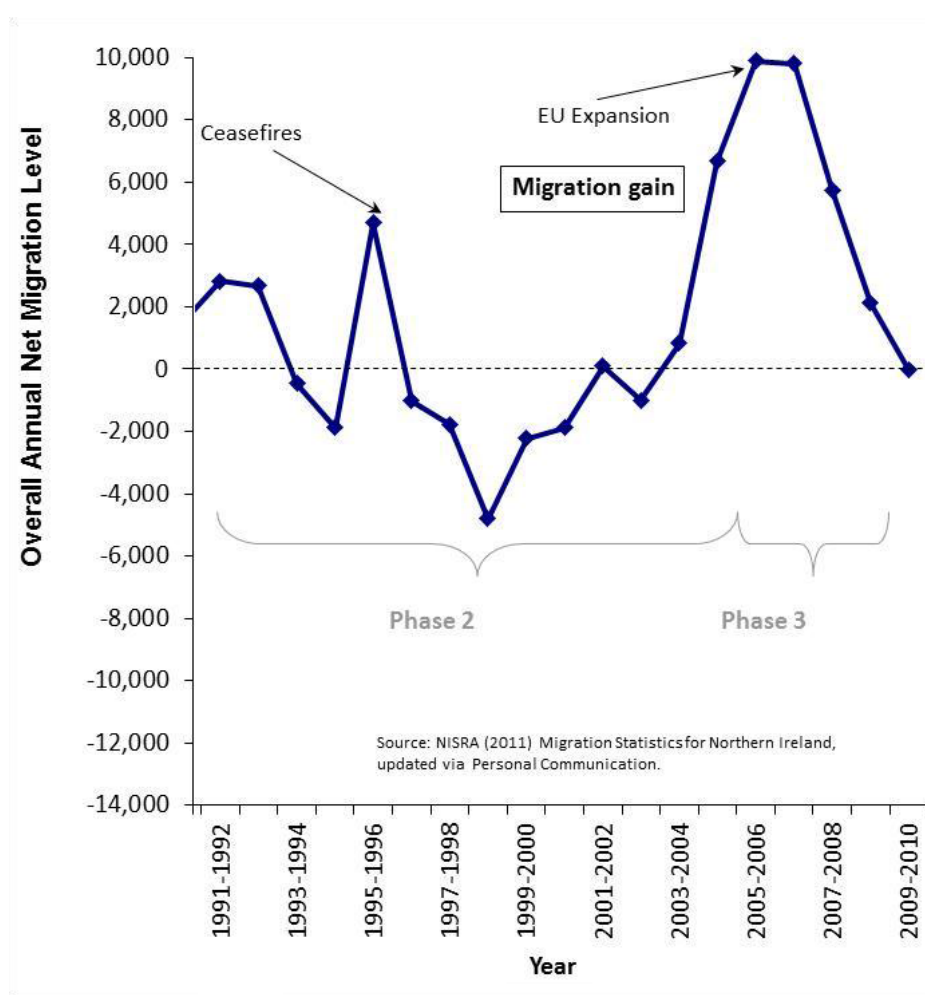
Figure 8: Population Change - Belfast (1981-2013)



Source: NISRA

A key driver of this newfound growth was a shift in Northern Ireland's migration trends. Following decades of net outward migration, there was a new phase of migration in the late 1990s and early 2000s when migration levels balanced out. Between 1990 and 2004 on average 20,000 people both left and moved to the country as the graph below shows. Then, in 2004, the accession of a number of Eastern European countries to the EU triggered a strong positive net migration into Northern Ireland, peaking at 32,000 inward migrants in 2007.

Figure 9: Northern Ireland migration trends (1991 – 2010)



Source: Northern Ireland Assembly 2012

Between 2004 and 2011, over half of applicants for the Workers Registration Scheme (WRS) in Northern Ireland were Polish citizens (55.5%). Other significant groups included those from Lithuania (18.8%) and Slovakia (13.3%)²⁴. These proportions are high in comparison to the UK as a whole. During the same time period, Northern Ireland had 25% more WRS applications from the 2004 accession countries as a share of the population than the rest of the UK²⁵.

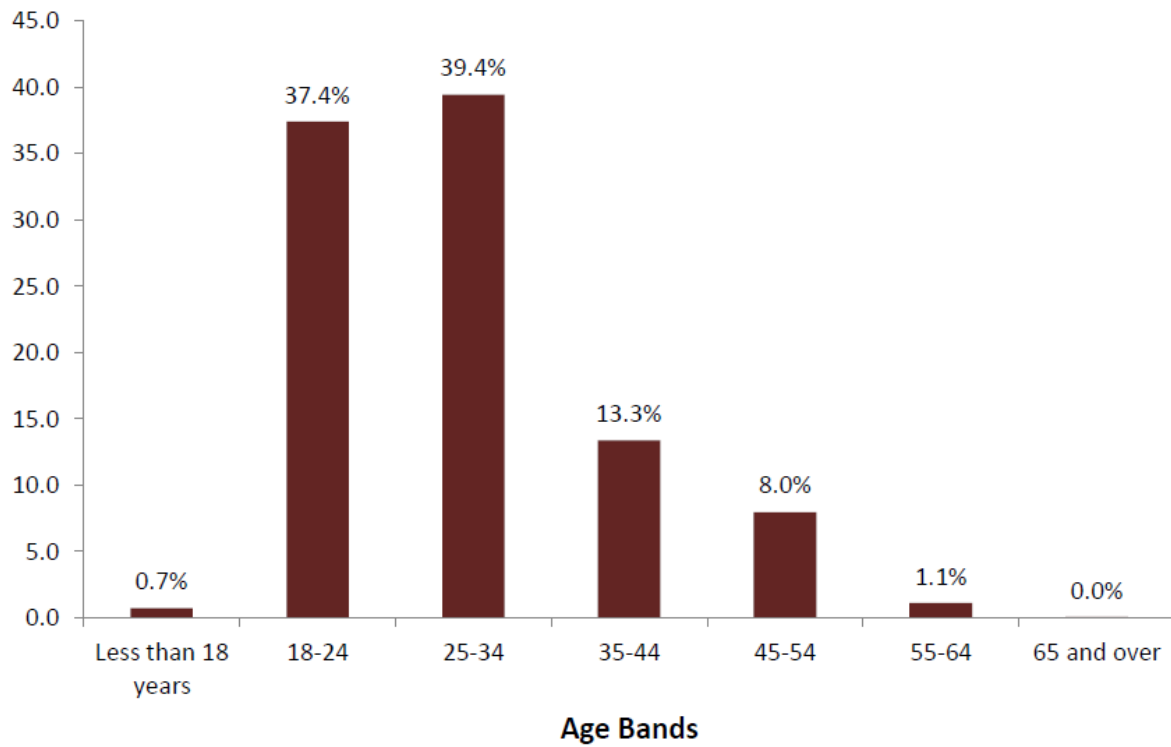
The migrants that moved to Belfast after the EU enlargement were typically young, male and migrated primarily for work. This, along with other demographic factors, resulted in Belfast developing a more youthful population over recent years. Between 2000 and 2010 the number of people aged 16-24 in Belfast increased by 5.1%. The average age of its citizens now stands at 35 years, with over 60% of the city's population being of working age²⁶.

²⁴ Russell, 2012.

²⁵ Russell, 2012.

²⁶ NISRA 2011; Department for Employment and Learning, 2011.

Figure 10: Northern Ireland Worker Registration Scheme Applicants by Age (May 2004 to March 2011).



Sources: NISRA 2011; Northern Ireland Assembly 2012

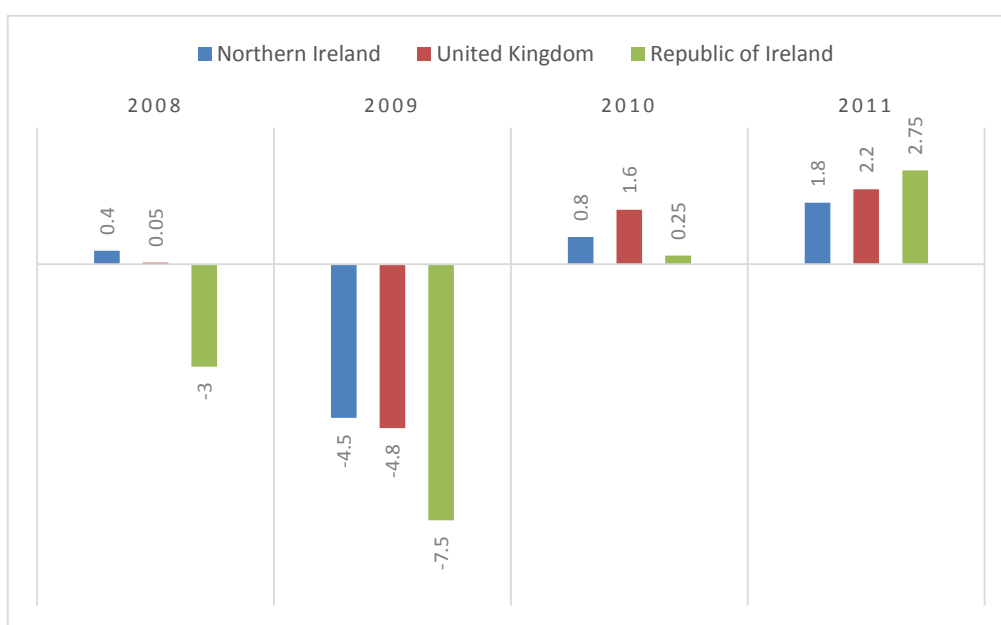
This change is a positive sign in Belfast and Northern Ireland, but these figures should be viewed within the overall demographic breakdown of the city; where there remains a relatively small ethnic minority population in Belfast – only 3.2% of the resident population are from an ethnic minority population²⁷.

²⁷ NISRA, 2011.

3. Financial crash

The 2008 recession resulted in the stalling of the economic progress made by Belfast since the Peace Agreement. However, in some ways, both Belfast and Northern Ireland's economies avoided some of the worst effects of the recession - particularly in comparison to the Republic of Ireland, with which the economy is tightly entwined. Firstly, Northern Ireland benefited from special support from the British government to minimise the risk of further violence. Secondly, Northern Irish political leaders on both sides made a dignified return to government in 2007 following several years of Stormont being suspended. This restored confidence in local leadership. Finally Northern Ireland also benefited during this period from the effect of a weaker euro in terms of cross-border trade with the Republic of Ireland²⁸.

Figure 11: GVA and GDP Growth (%) in Northern Ireland, UK and Republic of Ireland (2008 – 2011)



Source: Department for Social Development, 2013

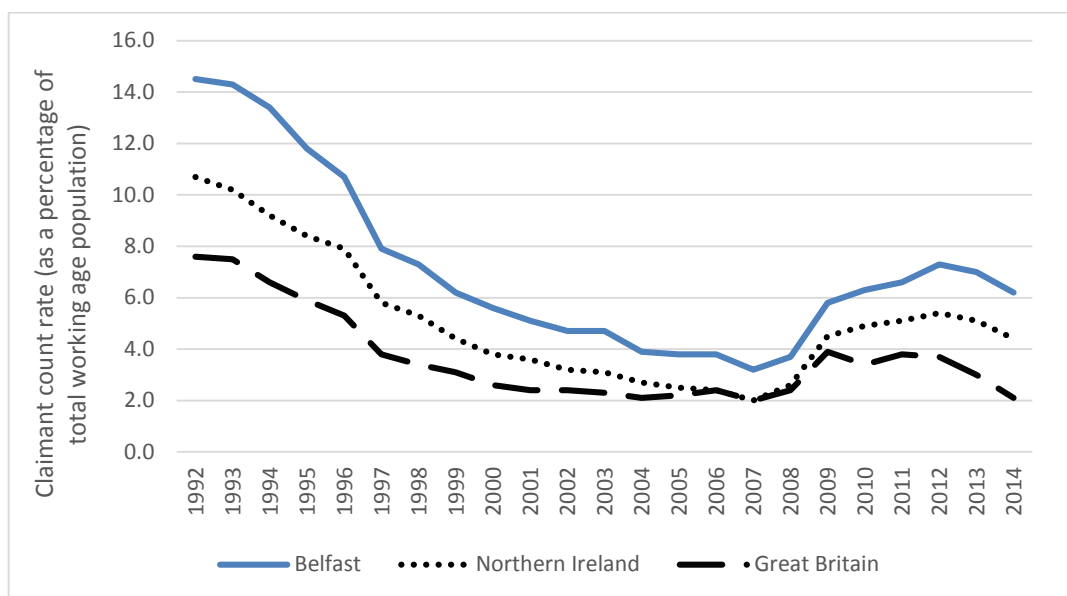
The financial crisis, followed by the Eurozone crisis in 2009, led to increased numbers of shoppers and visitors coming from the Republic of Ireland – Belfast and Dublin are only a two-hour train ride away. Visitor spending in the city peaked in 2009 - possibly due to this effect²⁹. In addition, a lot of investment in Northern Ireland following the Peace agreement came from the Republic. However, the severe banking crisis in the Republic of Ireland and the extremely tough bail-out conditions led to those resources drying up. The knock on effect on the Northern Ireland economy was very serious. Between September 2007 and April 2009, the number of unemployment benefit claimants in Belfast rose by 58% from 5,969 to 9,428³⁰.

²⁸ Morris, 2009.

²⁹ Belfast City Council, 2012; 2015; Belfast City Council and the Northern Ireland Tourist Board, 2014.

³⁰ Morris, 2009.

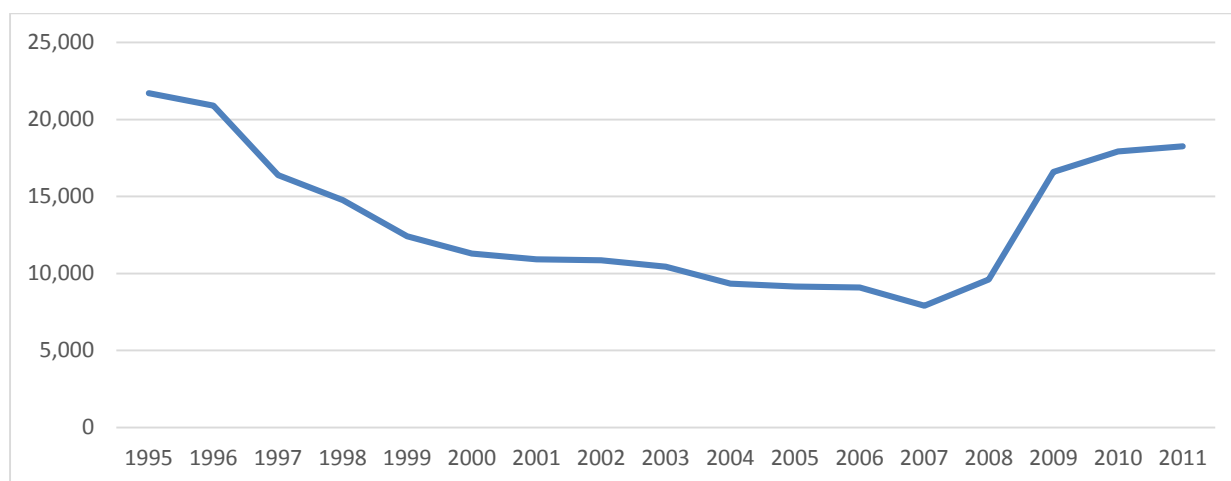
Figure 12: Claimant count rate



Source: Nomis 2014

The impact of the subsequent recession on young people in Belfast and Northern Ireland was particularly pronounced. By 2012 almost a quarter (24.4%) of all 16-24 year olds in Northern Ireland were not in education, employment or training - although this figure has fallen slightly since then³¹.

Figure 13: Youth claimant count rate in Northern Ireland (aged 18 to 24)



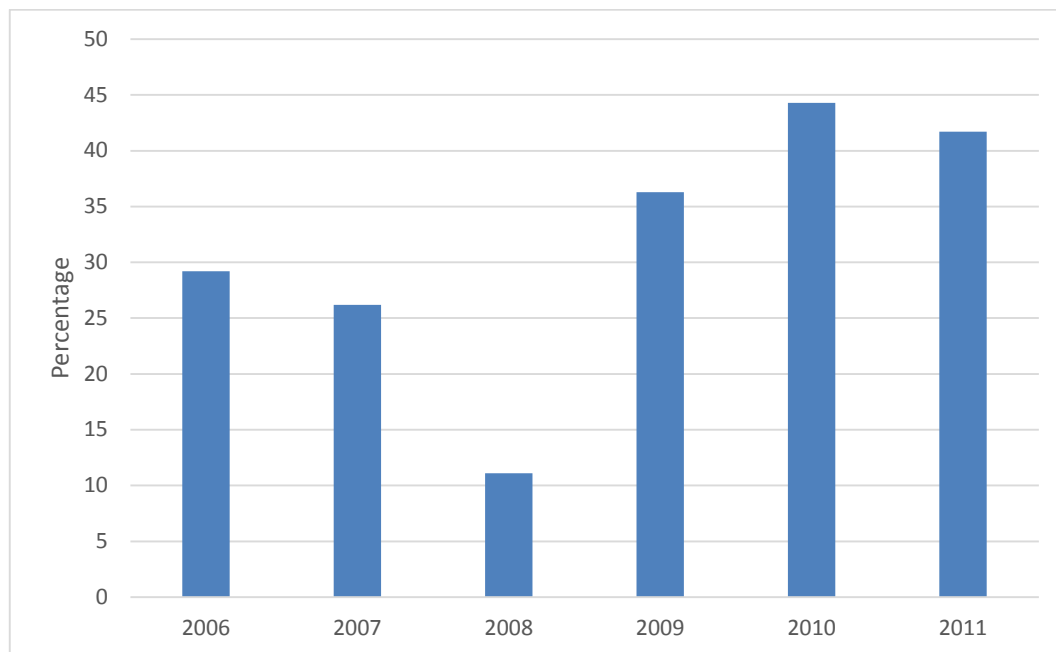
Sources: NISRA; Department of Finance and Personnel

The employment market across Northern Ireland became increasingly strained in the wake of the recession, and Belfast suffered particularly, because it lay at the heart of some of the worst affected industries, including manufacturing. Between February and April 2009, a series of high profile Belfast-based manufacturers announced significant job losses, including: Visteon UK, Bombardier, Nortel, and

³¹ Murphy, 2013.

Hughes Christensen³². Nearly 2% of all Northern Irish manufacturing jobs were lost in the week prior to Easter 2009 - with losses heavily concentrated in Belfast. As shown below, during the recession Belfast shouldered a significant share of the redundancies in Northern Ireland.

Figure 14: Redundancies in Belfast as a % of Northern Ireland total



Source: Department for Employment and Learning

House building and construction generally suffered during the recession. By the end of 2009, around 28,000 construction jobs had been lost since the downturn. Northern Ireland's construction industry took longer to pick up again than the rest of the UK³³.

The stalling effect of the recession on the Belfast housing market left large numbers of empty or unfinished homes in the city. In 2011 the city had 9166 empty dwellings³⁴. In response, Stormont officials have set up an Empty Homes Unit tasked with helping to reduce the number of empty homes in the province by 4 per cent by 2018.

³² Morris, 2009.

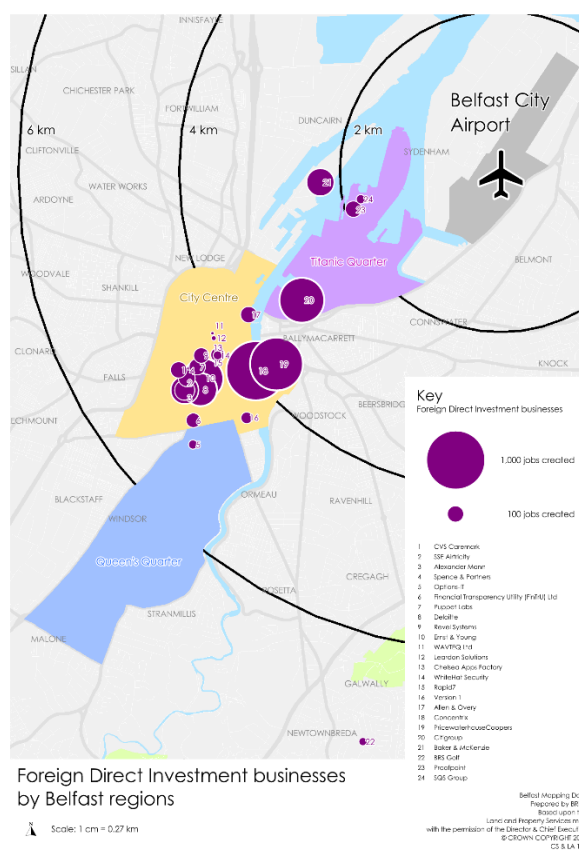
³³ Experian, 2012.

³⁴ NIHE, 2013. NB: this figure does not distinguish vacant from second/holiday homes.

4. Reshaping the Economy

Belfast City Council is now attempting to rebuild the city's economy in the aftermath of the 2008-2013 recession by re-centring it on high-growth and hopefully sustainable sectors. However it must do so in a challenging climate – the economic downturn created heavy financial burdens for the city³⁵. Yet Belfast has significant potential for economic growth. It has been successful in attracting inward investment, for which it describes itself as the second most successful city in the UK, behind London. Between March 2010 and 2011 the city saw a total of £636 million of investment commitments by both foreign and locally owned businesses, in addition to over 2,800 new private sector jobs secured from 41 separate inward investors. 81 per cent of these newly created jobs are paying above the Northern Ireland private sector average. The city centre, particularly towards the east of the centre has been particularly successful at attracting investment in recent years – as shown by the graph below³⁶.

Figure 15: FDI businesses by Belfast regions

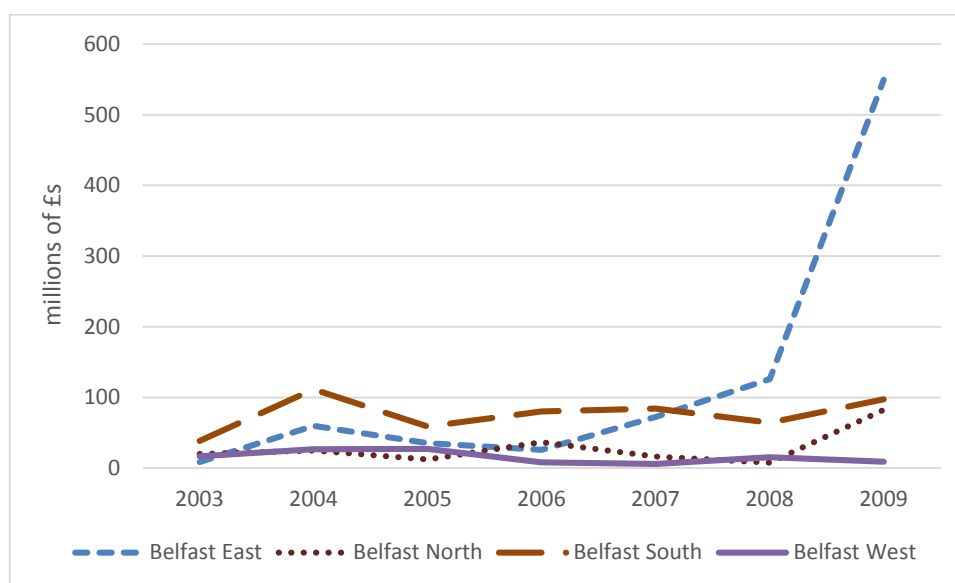


Source: Belfast City Council

³⁵ Belfast City Council Financial Report 2011 – in 2011, the City Council had nearly £30 million of outstanding external loans.

³⁶ Department for Social Development, 2013.

Figure 16: Assisted investment by parliamentary area (£m)rea (£m)



Source: Invest Northern Ireland 2010

Belfast is expected to have increasingly ‘graduate hungry’ employers over the next five years³⁷, with a corresponding depletion in jobs for the lowest skills cohorts. This is a significant challenge for the city where 41 per cent of residents over 16 years have no or low qualifications³⁸; particularly when only one in six jobs for new entrants between now and 2020 are forecast to be for people with low qualifications – compared to one in five in 2005 to 2010. In contrast, the higher skilled proportion of the workforce may need to increase from 28 per cent in 2005 to 43 per cent in 2020. As a result of these trends, there will be considerable pressure for Belfast to ‘upskill’ its current workforce to ensure it meets these demand³⁹.

Sectors of expected employment growth up to 2020 include; tourism, construction, retail and business services. Although manufacturing employment is expected to continue to decline, the rate may be much slower than in previous decades, with some growth opportunities in hi-tech manufacturing⁴⁰.

By working with key city stakeholders, Belfast City Council has been proactive in supporting economic growth areas, while upskilling the city’s workforce and providing the capital investment to stimulate growth through its Investment programme 2012-2015. Since 2012, several ambitious employment and skills initiatives have been implemented, including: the provision of 600 council employment, work placement, internship and apprenticeship opportunities; the introduction of social and community benefit clauses to contracts to provide employment opportunities for local people; and the implementation of a £300,000 bursary scheme to support 16 – 24 year olds to move into further education, training and employment.

As part of this Investment Programme, the Council has invested £150 million in projects throughout the city - upgrading existing community facilities, creating new ones, and investing in economic and social

³⁷ Department for Employment and Learning, 2009.

³⁸ NISRA, 2011.

³⁹ Oxford Economics, 2010; Department for Employment and Learning, 2009.

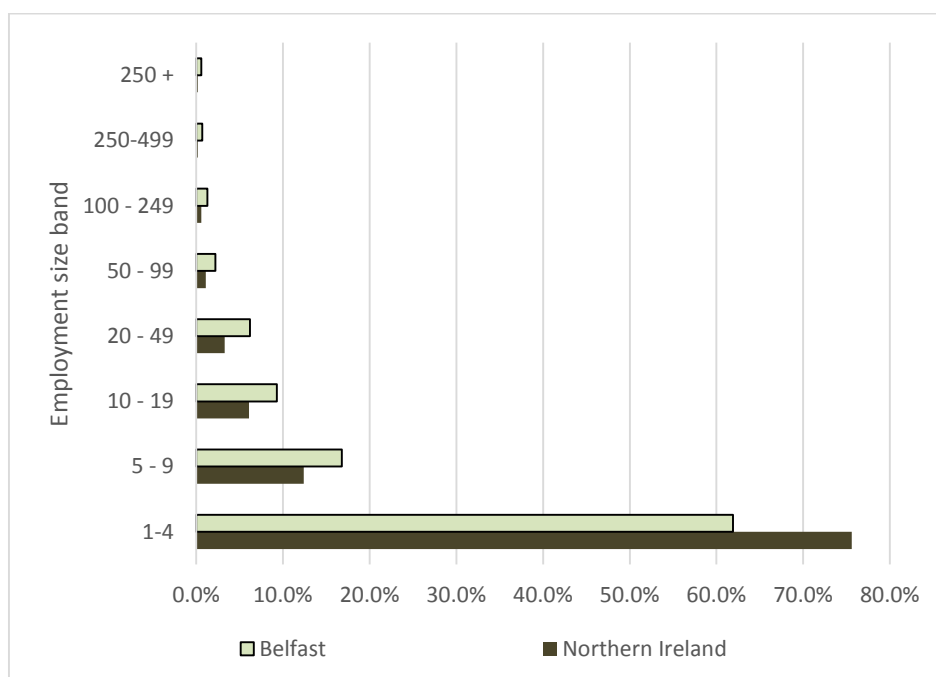
⁴⁰ Department for Employment and Learning, 2011.

development. This includes: £75 million in council facilities for local communities; £20 million in partnership projects; and £50 million levered from Europe and other sources to deliver economic infrastructure to support the development of key employment sectors including retail, creative industries, financial and business services and connected health. The Belfast economy appears to have weathered the worst of the 2008 recession and its resilience is at least in part explained by the strength of its SME sector.

SME Sector

The decline of major industries over recent decades has led to the Northern Ireland economy becoming heavily reliant on the contributions made by SMEs. In 2012, SMEs made up 75.6 percent of total private sector employment in the country (385,000)⁴¹. In 2014, Belfast was home to 8,635 SMEs, 13 per cent of the country's total, almost double the next highest Local Government District⁴². However, very small businesses (under four employees) constitute a smaller proportion of the city's economy than elsewhere in Northern Ireland. Businesses that employ more than four people represent 37.1 per cent of the total in Belfast, but only 24 per cent in Northern Ireland. Similarly, businesses with a small turnover (less than £100,000) constitute 31 per cent of Belfast's total, compared to 47 per cent in Northern Ireland.

Figure 17: Registered businesses by employment size band, March 2014

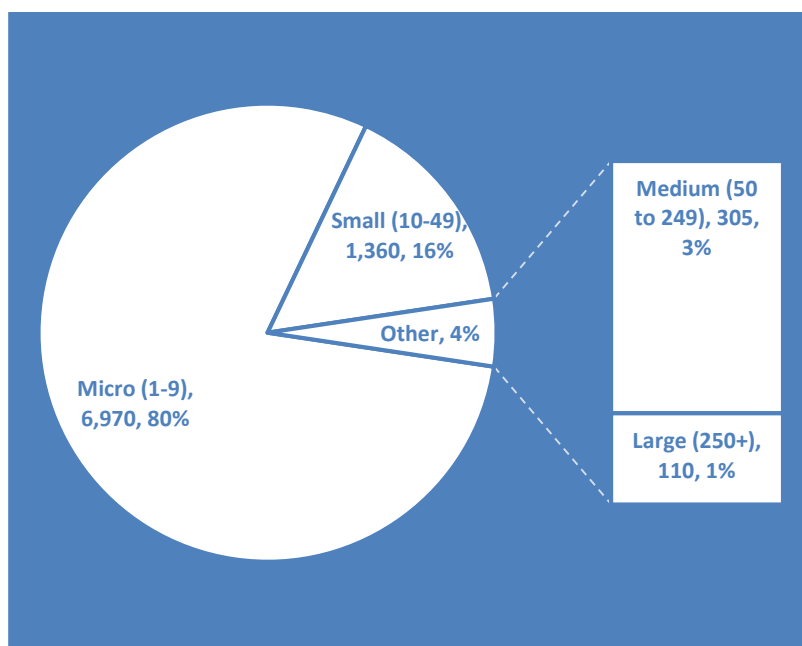


Source: Inter-Departmental Business Register, 2014

⁴¹ The Contribution of Small Businesses to Northern Ireland, 2015.

⁴² Inter Departmental Business Register, 2014.

Figure 18: Belfast number of businesses by employment size band (2014)



Source: Inter-Departmental Business Register, 2014 ⁴³

Outside the public sector, Belfast’s SMEs constitute the overwhelming majority of the city’s businesses (approximately 99 per cent). The sector with by far the largest number of SME businesses is the Professional, scientific and technical industry sector which has 1600 SMEs city-wide. The following figure shows the breakdown by sector.

Figure 19: Top ten industries in Belfast by number of SME businesses (2014)

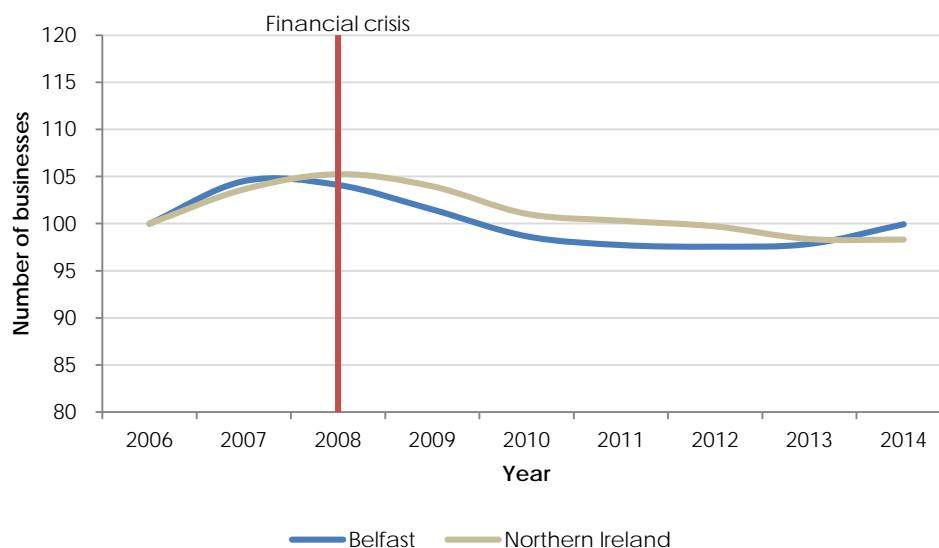
Industry	Number of businesses
Professional, scientific & technical	1600
Retail	975
Arts, entertainment, recreation and other services	835
Construction	755
Accommodation & food services	715
Health	705
Property	505
Information & communication	500
Wholesale	430
Business administration and support services	380

Source: Inter-Departmental Business Register 2014

⁴³ Definition of business: an enterprise which has its registered address in NI or operates in NI. From: Department of Finance and Personnel, 2014.

The SME sector in Belfast and Northern Ireland was hit by the 2008 recession. As shown below, the downturn had a more pronounced and extended impact on the numbers of Belfast SMEs than the rest of Northern Ireland as a whole due to Belfast’s closer links with the global economy.

Figure 20: SME index of Belfast and Northern Ireland



Source: Inter-Departmental Business Register

By 2011, Belfast’s SME sector was starting to regain confidence and buoyancy as 73 per cent of Belfast businesses at that time were expected to stabilise or grow in the coming year and 41 per cent expected an increase in turnover⁴⁴. In 2013 and 2014, the number of businesses in Belfast grew by over 2 per cent - almost the highest in Northern Ireland. The City Council is targeting support at ‘opportunity sectors’ for economic growth through SMEs: telecoms, ICT, professional and administration services, advanced manufacturing (including renewable and low carbon technologies), creative and cultural industries, and tourism⁴⁵.

Despite the positive outlook for Belfast’s SME’s, many firms struggle to grow and expand. Northern Ireland has the lowest rate of the UK regions for businesses surviving until the 5th year. Belfast had a survival rate of 29 per cent in 2014⁴⁶. A number of schemes and programmes have been introduced to support the sectors relating to: finance, services, collaboration, training and marketing.

Finance

Access to finance poses a real challenge for SMEs seeking to expand. In 2011 one third of Belfast businesses were finding it difficult to access finance and to maintain their cash flow⁴⁷. This is a particular problem in sectors associated with high research and development costs like advanced manufacturing.

⁴⁴ Belfast Business survey, 2011.

⁴⁵ Belfast City Council, 2012.

⁴⁶ Inter-departmental Business Register 2014; DETI

⁴⁷ Belfast City Council. 2011.

The Northern Ireland Assembly and Belfast City Council have offered their support for a proposal to undertake a new 'research and technology capabilities' study to identify priority sectors for state investment. The City Council also encourages key city research institutes to help small businesses leverage funding from the EU. Foreign investment is another vital source of finance for the Belfast business community and over the coming years, the City Council will seek to leverage more of this through the regeneration of Belfast's city centre.

Services

SMEs often lack access to the digital services available to larger firms and as a result the City Council have set up a number of schemes to support them. The Super Connected Broadband project will see over £13 million invested into the city's tech infrastructure. This includes: improved city-wide Wi-Fi access; public Wi-Fi hotspots in public buildings; and a connection voucher scheme offering grants of up to £3000 towards the cost of high speed broadband installation for SMEs and voluntary organisations. Attached to this programme is an investment in the Council's community centres to create IT hubs to promote digital literacy and access.

Collaboration

The potential benefits of collaboration for SMEs are significant. However, they often face barriers of time commitments and fears of being open with other companies about new methods for generating business growth. Belfast City Council is seeking to foster collaboration among the city's SMEs through the Belfast Entrepreneurs Network (BEN) - a discussion and networking forum for small businesses.

Training

A number of training programmes for entrepreneurs and small business owners are provided by the City Council. These include: skills for craft and food businesses (including the opportunity to test trade the products at a local market); training for product development, finance, sales and marketing; and the Belfast Enterprise Academy- a programme for degree students living in Belfast area who would like to become entrepreneurs.

Marketing

Even where SMEs have developed internationally competitive products, many find that they are unable to market them abroad successfully. In 2011 only 33 per cent of Belfast businesses had exported their products and services in the previous year, and over 75 per cent of those that did, only to the Republic of Ireland. In October 2013, the City Council completed its first trade mission to the west coast of the USA - attended by the city's two universities and 18 local SMEs.

City Centre Regeneration

Because of its pivotal role in drawing investment and visitors to the whole province, Belfast city centre is arguably the most important public space in Northern Ireland. There has been a concerted effort since the Peace Agreement to regenerate the centre and to maximise its potential to attract tourists and investors. Perhaps the most impressive achievement thus far has been the remodelling of the main streets in the city centre from around the City Hall to the main shopping areas into pedestrianised and

attractive, safe zones. This makes the area a welcoming, shared and comfortable space for all sections of society with no hint of the divides that still feature in Belfast.

Other important achievements are visible:

- The Cathedral Quarter, an old part of the city, has been transformed into a successful arty, alternative and attractive neighbourhood. There are also ambitions for this area to maximise its appeal and build on the relocation of the Ulster University to create an innovation and creative zone in the city.
- In 2008 the city also saw the completion of a £160 million mixed-use city centre shopping centre at Victoria Square. The ambitious project provides a total of 75,000m² of retail space as well as Northern Ireland's largest underground car park. It has been carefully designed to fit into the existing surrounding urban fabric.

Figure 21: Victoria Square, Belfast



Source: Belfast City Council

Despite these achievements, the city centre still lacks a significant residential population and there remains a strong outward trend of people and shopping. The centre is also beset by significant congestion problems and has an inadequate public transport system. In many ways the city centre still does not function strongly enough. Recognising that the city centre plays a key role in driving economic growth in Belfast, the City Council commissioned a new plan to strengthen it by attracting more people, as shoppers and visitors, but also as residents and particularly to bring in the students.

Following extensive consultation with city stakeholders, a City Centre Regeneration Strategy and Investment Plan was published for public consultation in January 2015. This plan examines proposals for regenerating the city centre over the coming decade and a half and identifies eight overarching policy objectives:

1. **Increase the employment population** - capitalise on Belfast's competitive advantage of comparatively low space and labour costs and well-educated workforce. Develop new office space and connect existing office space with city centre.
2. **Increase the residential population** – add vibrancy to the city centre by supporting residential developments at key locations.
3. **Manage the retail offer** – address retail decline in the centre through a targeted and proactive approach.
4. **Maximise the tourism opportunity** – complement existing tourism offer with big attractions and festivals and foster greater buzz in the city centre.
5. **Create the region's learning and innovation centre** – address the city's low rates of innovation and entrepreneurialism by providing cheap and flexible space for new businesses.
6. **Create a green, walkable, cyclable centre** – provide more open spaces along with a comprehensive streetscaping programme.
7. **Connect to the city around** – reduce barriers to the city centre, for example through the provision of two new pedestrian bridges over the River Lagan and streetscaping key corridors.
8. **A shared space** - use design and programming of space to ensure that the city centre is a welcoming and attractive place for all.

The City Centre Regeneration plan is designed around four pivotal areas; the South Centre, the Core, the North Centre and the Lagan Corridor. Each area has specific projects which tie into the eight policy objectives above. In addition, five special action areas in the city centre have been identified which require further, more detailed consideration

Upgrading

South Centre: A commercial hub

The South Centre is and will be the primary focus for Belfast's office sector and Northern Ireland's knowledge economy. A series of strategic moves will seek to revitalise its office function and ensure it retains its primacy in related industries.

- The **development of a new Grade A office district** around the new transport hub supported through investment from the City Council.
- **Streetscaping to improve the quality of the public realm**, including a grand central avenue to anchor the office core.
- A **new transport hub** at Great Victoria Street – increasing the area's rail connectivity with the rest of Northern Ireland.

The Core: improving retail provision

The Core's retail offering will be developed- building upon the historical retail spine of Donegall Place and Royal Avenue and the newer developments at Victoria Square and CastleCourt. A redeveloped Royal Exchange block will be the centrepiece of a new reinvigorated retail core.

- The report recommends a feasibility study to examine whether the **Belfast Investment Fund (BIF) could support retail development** around the Royal Exchange block.
- It proposes a proactive approach to **improving quality of retail offer in Donegall Place area**, including identifying needs, preparing sites and attracting retailers.

Figure 22: Donegall Place – City Hall



North Centre: a centre for learning and innovation

The North Centre will be the home of a growing learning and innovation centre for Belfast. Building upon existing institutions such as the University of Ulster, the Cathedral Quarter and Belfast Central Library- the area will be the centre of Belfast’s digital and media growth.

- **Development of a new city centre campus for the University of Ulster (UU).** This will be transformational and may generate up to £300 million worth of investment from one developer alone. Other proposed changes to the area include the enhancement of pedestrian provision, incubator uses for vacant buildings, and the creation of an innovation district north of the Dunbar Link.
- **There is an opportunity for the BBC to relocate some of its offices to the North Centre.** The City Council will play an active role in supporting, including conducting a site options analysis and facilitating preparation of a preferred site. New BBC facilities have had powerful regeneration effects previously on communities in Salford (Manchester) and Cardiff (Wales).
- **Expansion of Belfast Central Library** to make it more modern, user-friendly and geared towards multi-media use.
- **Creation of a large public open space** through the combination of Buoy's Park, Writer's Square and nearby areas. In the long term Cathedral Gardens may also be expanded.

- **The City Centre plan will encourage collaboration between two universities, Ulster and Queens,** feeding into a greater student presence in the centre.

Lagan Corridor: the Belfast riverside

A major integrated urban design, redevelopment and programming initiative to make the Lagan Corridor an attraction for locals and tourists alike. The proposals will re-orient the centre of Belfast toward its river and transform the once negative area into a significant public asset.

- The **rationalisation of Oxford Street will focus on pedestrian, cyclist and public transport** and unite the centre and its waterfront. Vehicular traffic will be calmed through the alteration of road space use- enabling greater pedestrianisation.
- The **development of a continuous promenade along both sides of the river** for both pedestrians and cyclists. This will be enhanced with public art installations, the provision of bike stands and sharing docks and larger open spaces along the promenade.
- **Two new pedestrian bridges** will increase connectivity along the river.
- **Increased residential development along the riverfront** will be promoted on publicly owned sites, with funding packages for private developers. The potential for retrofitting some of Belfast’s former industrial structures will also be assessed.

Figure 23: The River Lagan



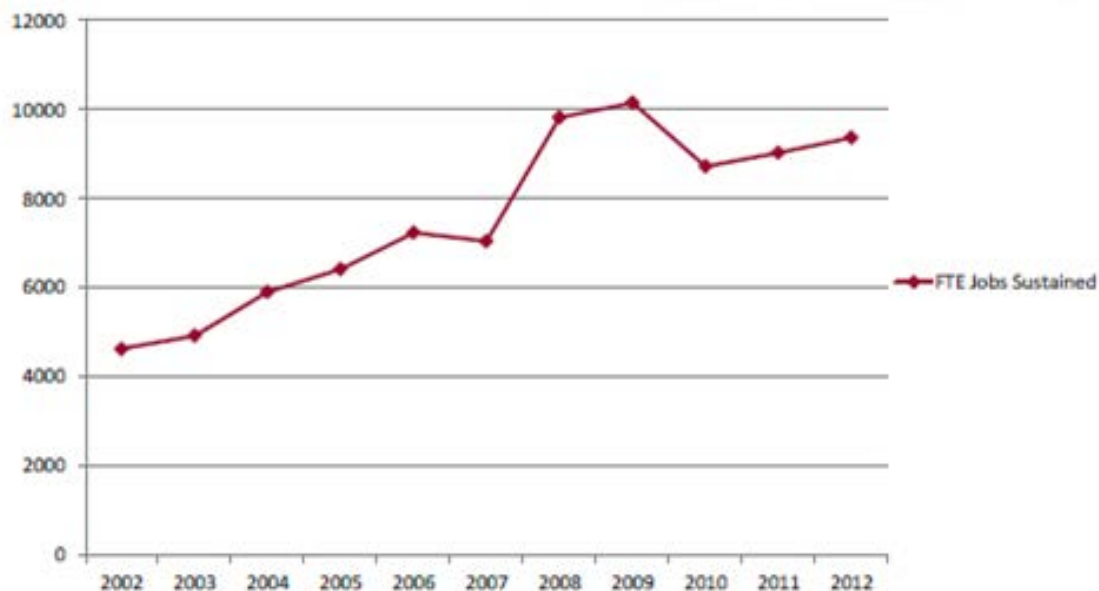
Source: Belfast City Council

Culture and tourism

Ever since the Peace Agreement, Belfast has become an increasingly popular tourist destination. Some of the city's main attractions tell the story of its turbulent past, such as Shankill/Falls Roads, Crumlin Road Gaol and the community murals on end-of-terrace walls. In this way, ironically, tourism has contributed to the healing process. One such example is where former IRA and Ulster Volunteer Force gunmen have, since the Peace Process, been trained as city tourist guides. They must be qualified for this work and demonstrate they are willing to negotiate and deal with their counterparts from former opposition groups. The guided visits to former trouble spots are particularly popular with American visitors.

The growth in tourism has been fairly continuous since 2000. Since 2006 the annual Belfast visitor economy has grown by over £113 million - an increase of over 35 per cent. Tourism now plays a significant part in the local economy - in 2013 it was responsible for over 9,300 full time equivalent (FTE) jobs. The city accounts for 60 per cent of all tourist expenditure in Northern Ireland⁴⁸.

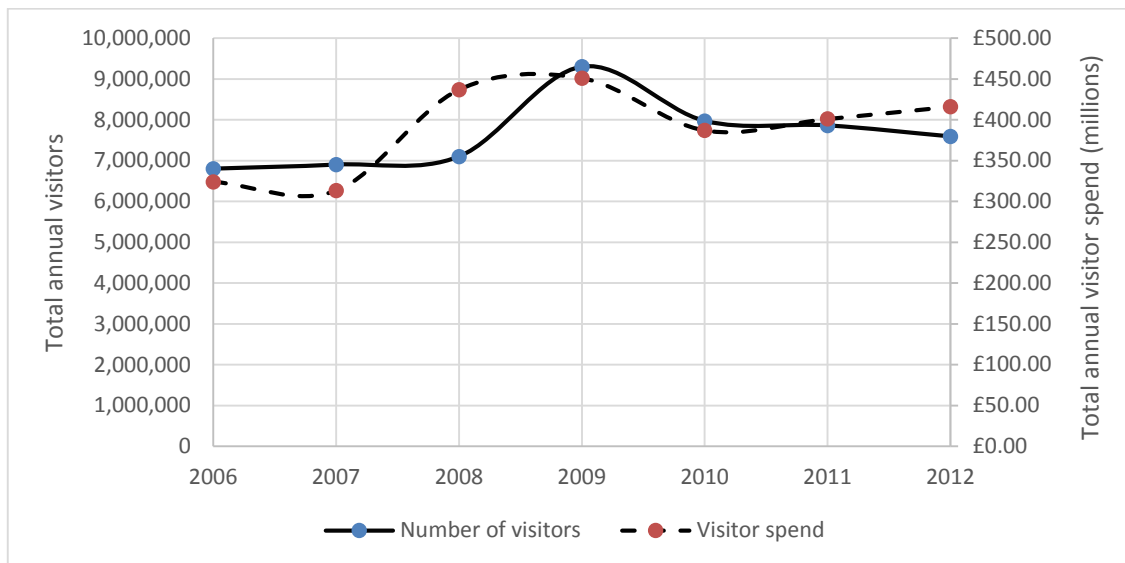
Figure 24: Full-Time Equivalent Jobs Sustained by Tourism in Belfast



Source: Belfast City Council, 2012

⁴⁸ Belfast City Council and Northern Ireland Tourist Board, 2014.

Figure 25: Belfast tourism numbers and spend (2006 – 2012)



Source: Belfast City Council Tourism Facts and Figures

Belfast City Council has identified tourism as a key ‘opportunity sector’ for economic growth in the coming years, particularly business tourism and young travellers. In the five years from 2015 to 2020, the Council estimates that the total value of tourism to the city’s economy could be in excess of £3 billion. With the aim of building prosperity by becoming a world leader in innovative, dynamic tourism development and marketing the Council, working with its key partners aims to double the value of tourism in the city by 2020 - resulting in tourist revenue of £870 million per annum within five years. Local Government Reform in Northern Ireland will put Belfast in a stronger position in the coming years to develop its tourist industry. From April 2015 Belfast City Council will have greater responsibility for economic development and local tourism along with its new power of general competence.

The city has identified a number of key areas of work if the ambitions of the tourism strategy are to be met by 2020:

- Clear positioning: understanding and expressing Belfast’s unique selling points and communicating that message to key markets
- Establishing a reputation as a global leader for delivering innovative, highly satisfying, tourism experiences that will strengthen the emotional connections between the tourist and the city
- Making Belfast a destination of choice for increasing numbers of leisure and business tourists
- Increasing the city’s year-round appeal as a value added, high quality, leisure and business tourism destination, thus increasing visitor satisfaction, length of stay and expenditure;
- Creating prosperity and new opportunities to improve the quality of life for all residents and securing widespread community support and recognition of the importance of tourism to the city’s economy.

There is reason to be optimistic. City tourism is increasingly driving global tourist growth, and Belfast is capable of tapping into this market far more. At the moment its appeal to the wider global market is still relatively limited – 95 per cent of external visitors come from the Republic of Ireland and Great Britain⁴⁹. Belfast has already shown signs that it can successfully develop its global tourism. In 2012 the Financial Times listed Belfast as one of the *'Top 10 places in the world'* to hold a conference or major event and Trip Advisor chose Belfast as the best value city break. In recent years it has also successfully hosted a number of high profile world events (a vital way of boosting the city's global appeal), including the 'Tall Ships' races in 2009, the 2011 MTV Music Awards and the 2014 Giro d'Italia cycling competition.

Building on this success and the growing reputation of the city, there has been a focus on infrastructure investment to improve the visitor experience and to attract new visitors to the city such as the development of a new state of the art Visit Belfast Welcome Centre in the city centre and the extension to the Belfast Waterfront Exhibition & Convention Centre which will double the existing facilities and help Belfast tap into the growing business tourism market; it is estimated that this will contribute £45m towards the local economy each year.

Box 1: Giro d'Italia 2014

Northern Ireland beat a rival bid in 2013 from Venice to secure the start of the Giro d'Italia international cycling competition. Around 5,500 people gathered in May 2014 at City Hall for the start of the event.

The success of Belfast's hosting of the event also triggered talk of re-launching the Tour of Ireland – a professional cycle race that was held from 2007 to 2009 but ceased after the global economic crisis led to funding cuts.

The Tourism Strategy 2015-20 recognises that there are a number of macro-issues that unless addressed by all levels of government will continue to limit the city's tourism potential.

1. **Air access** – in comparison to Dublin, Belfast has limited air routes linking it to important leisure and business tourism markets. In the summer of 2014, the two Belfast airports were reporting a 7 per cent fall in carrying capacity compared to the previous reporting period - primarily driven by reduced services to and from Great Britain⁵⁰. This was contrasted with a 14 per cent increase in the overall air capacity of the Republic of Ireland over the same period. Officials from NI's Department for Enterprise Trade & Investment (Northern Ireland Executive) are now working on securing an 'Air Route Development Fund' - focusing on developing new European routes into Belfast, particularly from European hubs like Schiphol (Amsterdam), Charles de Gaulle (Paris) and Frankfurt.
2. **Visa requirements** – The issue of differing visa requirements of UK and Irish governments places Northern Ireland at a significant competitive disadvantage. It is particularly impacting on tourism in Belfast.
3. **Currency and VAT** – travel between the Republic of Ireland and Northern Ireland is also restricted by the differing currencies in use in the neighbouring countries. One suggestion made

⁴⁹ Belfast City Council, 2012.

⁵⁰ Northern Ireland Tourist Board, 2014.

in Belfast's Draft Tourism Strategy is for businesses in Belfast to either accept Euros or to offer prices and payment options that recognise Euros - making it easier for cross-border travellers⁵¹.

The city still needs to work on altering its image and actively promoting itself globally. The Council, working with key partners has begun work on developing a city positioning strategy which will develop a shared narrative for the city which can be used by all stakeholders to promote Belfast internationally – while this is at an early stage there is a recognition that the unique history of Belfast with the legacy of the conflict acts as both an attraction and a detractor for certain tourist groups.

Titanic Quarter

The Titanic Quarter is one of the best examples of how Belfast's rich history is being woven into new developments with contemporary cultural appeal. The quarter, in the old docks, lies on the fringe of Belfast's city centre and is one of Europe's largest waterfront regeneration developments with around 185 acres of former shipyard lands. It is being transformed into a new mixed use maritime quarter with a mile of water frontage and many investment opportunities.

There are three main elements to the project:

- Titanic Signature project – identified by Northern Ireland Tourist Board in 2004 as one of five key tourism developments to enhance the Northern Ireland tourism offering. The site's attraction is based on the Titanic and Maritime Belfast theme and encompasses a number of elements:
- Titanic and Olympic slipways – the location where the Titanic first touched water in 1911.
- Thompson Dry Dock and Pump-House – now situated within the Northern Ireland Science Park, where the Titanic was built.
- Harland and Wolff's former headquarters and drawing offices – an early 20th century office block, once home to the administration and drawing office centre for the world famous Harland and Wolff shipyard, now a public visitor attraction.
- SS Nomadic – the world's last remaining and fully restored White Star Line ship. The original tender ship to the Titanic, situated at Hamilton Dock.
- Titanic Belfast which sits within the wider Titanic Signature project, is a world-class visitor attraction, drawing on Belfast's shipbuilding and maritime history located in the heart of the Titanic Quarter. The building commemorates the fateful design and building of the Titanic. The new building opened in 2012 to mark the centenary of the sinking of the Titanic when 5,000 passengers drowned. In addition to drawing over a million visitor experience ticket sales already, the site has also welcomed more than 60,000 people for private conferences and banqueting events.
- Titanic Quarter Development - the long term regeneration of the overall area will cost £7billion and take until the 2030s to complete.

⁵¹ Belfast City Council, 2014.

Figure 26: Titanic Belfast



New developments in the Titanic Quarter include: the relocation of the Public Records Office of Northern Ireland (PRONI); a new Premier Inn Hotel; and the opening of Titanic Studios, film and television studios used for the HBO hit series, Game of Thrones, from 2010-14. In 2011, the Quarter also saw the opening of a new £44 million campus for Belfast Metropolitan College – the largest further and higher education college in Northern Ireland. The new campus, situated at the heart of the Titanic Quarter, caters for 2,500 additional full-time students, and offers a variety of vocational and academic qualifications.

Figure 27: Belfast Met College, Titanic Quarter



Northern Ireland Science Park

One of the flagship developments at the Titanic Quarter is the Northern Ireland Science Park - the new home to Belfast's burgeoning high-tech and renewables sector.

The Northern Ireland Science Park (NISP) was first conceived under the 1998 Good Friday agreement and formed a year later by the University of Ulster, Queen's University of Belfast and members of the local business community. The foundation, initially funded through a number of UK government economic initiatives, has since become home to a growing technology sector in Belfast including: digital services; advanced manufacturing; and renewables. In 2014 its turnover reached £4 million and its pre-tax profit grew from £226,000 to £612,000. The NISP is located on Queen's Island in Belfast- a location perceived as neutral ground by the whole city.

The Innovation Centre is an award winning workspace facility for high growth sectors located at the NISP. It was set up in 2003 through funding from the International Fund for Ireland and Northern Ireland's Department of Enterprise, Trade and Investment. It primarily acts as a 'staging post' for rapidly growing companies, including those that have already outgrown their facilities but are in the process of transferring to larger premises within the Science Park. It has been particularly successful at attracting technology start-ups using an innovative short-term leasing structure along with the most up-to-date digital infrastructure.

Figure 28: The Innovation Centre, the Northern Ireland Science Park



5. Energy and the Next Industrial Revolution

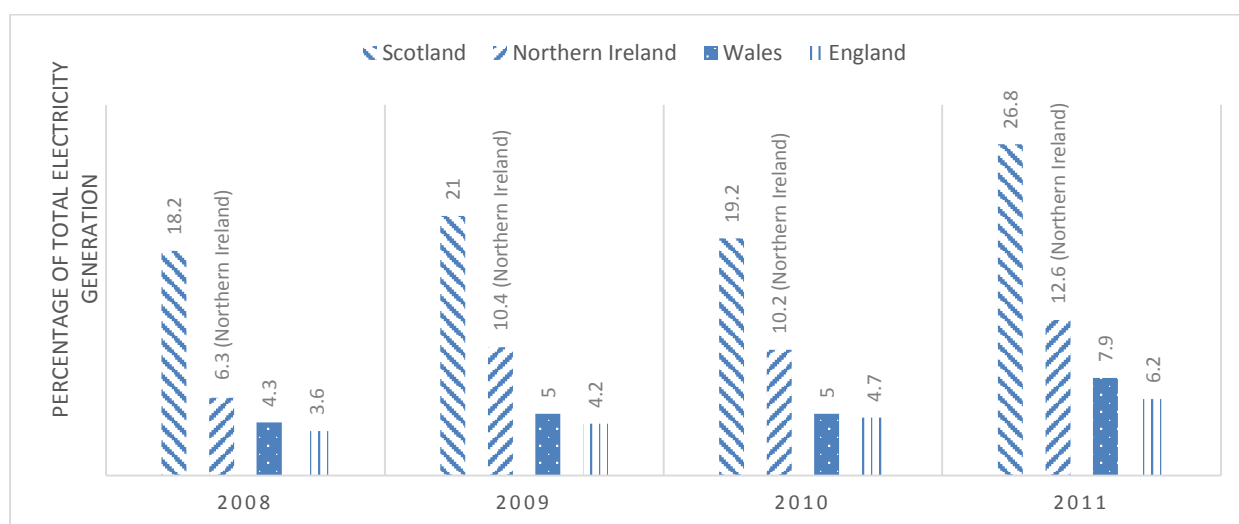
Energy challenges and the role of renewables

Energy supply, energy use and fuel poverty are extremely serious challenges for Northern Ireland. The province and republic have no coal, oil or natural gas and are virtually 100 per cent dependent on energy imports. Belfast has the highest per capita carbon emissions of the top 20 UK cities. Northern Ireland's electricity is the most expensive in the UK and less than 20 per cent of its homes are connected to the gas grid⁵². Northern Ireland has a fuel poverty rate of 44 per cent; with Belfast standing at 45.4 per cent⁵³.

Yet Northern Ireland is richly endowed with both wind and marine energy and is developing those fast. Northern Ireland, and Belfast in particular, also have the engineering skills, the research and technical capacity, the well-qualified workforce and the disused infrastructure to facilitate a major shift in energy production and use. This shift is happening, supported by the Northern Ireland government, Belfast City Council, the universities and education sector and private sector interests.

Between 2003 and 2013 there was a 1,368 per cent increase in generation from renewables in Northern Ireland – the highest of any region in the UK, which itself had a growth rate of 407 per cent⁵⁴. Although Northern Ireland currently lags behind Scotland in terms of the percentage of its electricity generation coming from renewables, it produces a bigger percentage than England or Wales. It has been expanding this sector for 10 years. In 2010, renewable energy sources accounted for just under 10 per cent of all electricity consumed in Northern Ireland, but the target is to raise this to 40 per cent by 2020. Belfast is driving much of this growth.

Figure 29: Percentage of electricity generation accounted for by renewables (2012)



Source: Department of Energy and Climate Change, 2012

⁵² Belfast City Council, 2012.

⁵³ NI House Condition Survey, 2009.

⁵⁴ NB: these figures should be treated with some caution due to the low baseline numbers from which they are derived.

Wind energy

Wind energy already constitutes over 87 per cent of the province's electricity generation from renewable sources⁵⁵. Belfast's geography and skills base in particular mean that it has huge potential to expand its wind powered electricity generation. Belfast Harbour Estate encompasses 2,000 acres (20 per cent of the Belfast city area) and offers large scale development opportunities for offshore wind projects.

In 2012 Belfast Harbour invested £53 million in the UK's first bespoke offshore wind terminal - capable of pre-assembling and installing over 100 wind turbines. The terminal was constructed on a 50 acre greenfield development site and was subsequently handed over to DONG Energy and Scottish Renewables. It will be used as a hub to help service a UK market valued in excess of £100 billion and is expected to create up to 300 jobs, ranging from welders to electricians and engineers. The terminal represents the largest single investment in the 400 year history of Belfast Harbour.

The UK is the leading offshore wind generator in Europe and aims to construct a total of 11,000 new offshore wind turbines. A quarter of these are planned to be built within 150 nautical miles of Belfast- with almost 2,500 off-shore wind turbines to be installed within reach of the Harbour by 2020.

Tidal energy

Although the majority of Northern Ireland's renewable energy generation presently comes from wind, Belfast is leading the way in tidal energy production using giant sea turbines fixed to the sea bed and driven by fast flowing tides both in and out. The continuous tidal flow makes their energy generation both predictable and virtually without intermissions (unlike wind).

In July 2008 Northern Ireland saw the commissioning of the world's first commercial-scale tidal turbine at Strangford Lough near Belfast. The £12 million project is the world's first commercial energy generator from tidal steam. The tidal current at Strangford Lough is more than four times more powerful than the world's second most powerful tidal current. Strangford Lough has a highly energetic tide flow, among several around the UK's coastal waters. The Pentland Firth of the North East of Scotland is another.

The tidal turbines at Strangford Lough have acted as a prototype for even larger installations. Marine Current Turbines (the company responsible) has since secured approval to deploy this award-winning tidal current technology off Brough Ness, on the southernmost tip of the Orkney Islands. The Brough Ness tidal array will have a total generating capacity of 99MW – enough power for nearly 100,000 homes.

Academics at Queen's University Belfast have been responsible for a £2m research programme to monitor the environmental impact of the tidal turbine system in Strangford Lough. The university is now home to a world renowned wave power research team that has contributed to the development of three prototype wave power devices. This project is indicative of Queens' longstanding application of academic research in order to cross-fertilize with industry. They were one of the first universities in the UK and Ireland to form spin-off companies. In 1984 it established QUBIS Ltd, a holding company that provides funding and intellectual property rights to new spin-off ventures. Since its launch, QUBIS has been involved in the creation of 65 companies. It is second only to the University of Cambridge for job creation through its spin-off companies, having generated 1,350 high quality jobs.

⁵⁵ Department of Energy and Climate Change, 2014.

Queens University have also, since 2013, hosted the Centre for Advanced Sustainable Energy (CASE) research centre - an organisation that focuses on the development of innovative technologies for the sustainable energy sector. The £7 million research centre, funded by Invest Northern Ireland, also draws upon the research capabilities of the University of Ulster and the Agri-Food Biosciences Institute. It aims to bridge the gap between universities, research institutes and innovative businesses in order to strengthen Belfast's capacity to compete in the global sustainable energy market.

Proposed projects to boost Belfast's Green Industry

1. Waste heat at the North Foreshore Landfill site

The North Foreshore landfill is a 340 acre site used for waste and rubbish dumping by the city and is now closed. It is now home to a renewable electricity generation plant that, since 2009, has been extracting and producing clean electricity from methane gas. The site currently generates 2mw/h of electricity that is sufficient to power 2,500 homes. The income from the sale of the renewable electricity into the grid to date is approximately £4million.

Box 2: Why capturing methane from landfill matters

The capture and use of methane gas has a twin positive environmental impact - both producing clean energy and preventing damage to the environment. Typically, landfill gas is comprised of 60 per cent methane and 40 per cent carbon dioxide. Methane is a greenhouse gas 21 times more potent than carbon dioxide, but if it can be collected and turned into electricity this can have a dramatic effect on greenhouse gas emissions that would otherwise result from the escaped methane. It greatly reduces the negative impact of methane leakage into the atmosphere and offsets fossil fuel consumption and the carbon dioxide emissions associated with this. One megawatt of electricity generation from landfill methane gas over a period of 10 years prevents the release of 35,000 tonnes of carbon dioxide emissions from fossil fuel power stations over the same period.

Belfast City Council has applied for £6 million of part funding from the European Regional Development Fund under the European Sustainable Competitiveness Programme for Northern Ireland and Invest Northern Ireland, to promote and develop the environmental resource park. Construction work to prepare the development sites, and build the roads is due to be completed in summer 2016 The Environmental Resource Park is an innovative concept to create a sustainable decentralised renewable energy hub, and to promote the development of a cleantech cluster with a focus on resource management, renewable energy, and environmental technology.

One potential opportunity that could be considered is the use of the waste heat at North Foreshore produced by the Landfill Gas Generators for horticultural growing in glasshouses. The waste heat could potentially serve up to 2.3 hectares of glasshouses for tomato production and payback the initial capital outlay in just over three years. Research is underway to investigate the efficiency of Organic Rankin Cycle to use the waste heat to generate further electricity (125kW of electricity can be produced from approximately 1MW of waste heat). This could have a payback of around three years subject to the technology adopted.

2. Water projects

Ligoniel is an area on the north-west periphery of Belfast- home to a series of historic dams that powered the city's early industrialisation during the late 1700s. Belfast City Council, with the support of Innovate UK has proposed reusing these existing structures to build modern hydro-electric schemes for electricity production as has been done in Torino.

This will involve the installation of three hydro-electric generator systems that will produce a steady renewable energy flow and income for the local economy from the sale of hydroelectricity to the national grid for the island of Ireland (the Single Electricity Market). The total projected electricity output for the three turbines is 115kWe with an annual revenue of around £72,000 per year. The scheme may also introduce flood relief systems to protect Belfast from the severe flooding it has suffered in recent years.

Additional proposals at Ligoniel include the use of the profits from the hydro-electric power generation to support community based organic food production and commercial flax and linseed oil production.

3. Glencairn energy and food project

The aim of this project is to investigate the possibility of developing urban agriculture and biomass production in a built-up area. Glencairn is a deprived peripheral ward in the North-West of Belfast with high levels of benefit dependency - 49% of those living in the Glencairn ward were economically inactive in 2012. This project proposes an investment of £1 million over the course of 10 years- the equivalent of the ward's annual benefit bill. The £1 million investment would be used to develop facilities for the farming of willow, snails, and a range of vegetables and herbs as well as the construction of a 1MW biomass and Combined Heat and Power (CHP) plant.

The 10 year programme aims to transform the area into a resilient and self-sustaining part of the city. It would also contribute to closing Northern Ireland's energy deficit.

Overall, Northern Ireland, with Belfast at the heart, is taking many proactive steps to tackle what is one of its biggest challenges – a critical energy deficit and severe economic pressure, alongside truly path breaking environmental potential.

6. Reorganisation of housing provision, local governance and devolution of powers

Northern Ireland has evolved extremely complicated and in many ways heavy-handed systems of government. It combined both more layers of bureaucracy than the rest of the UK, and simultaneously far more localised political and community structures. At all levels of governance, the need to represent different interests, while retaining some sense of balance, is a constant challenge. Major changes to Northern Ireland's local governance structures are being introduced in the coming years. This section looks in turn at these reforms: first, changes to the Northern Ireland Housing Executive; second, alterations to the country's local government structure; third, plans to devolve further powers from Westminster to Stormont.

Changes to the Northern Ireland Housing Executive (NIHE)

Proposed changes to Northern Ireland's centrally administered public housing, in order to devolve responsibility, are currently under discussion. The Housing Executive is large, controlling a rented stock of almost 90,000 subsidised homes. It is an expensive bureaucracy. The reforms are still under consideration, but whatever the decision, there will be major implications for Belfast's low income communities.

Through the Social Housing Reform Programme (SHRP) the Department of Social Development proposes that:

- The Department take responsibility for overall Housing Strategy, policy, legislation and funding, as well greater regulatory and inspection powers.
- A Regional Housing Body support the delivery of strategy and policy- staffed by housing professionals. This will in effect deliver the non-landlord functions of NIHE.
- The development of a new landlord function at arm's length from the public sector- focusing on services to tenants which will allow access to private investment.
- An Independent Social Housing Rent Panel be established- which will agree annual rent levels.
- The Housing Council (a body representing all of Northern Ireland's local councils) be dissolved. However, some housing functions are to be transferred to the 11 new amalgamated councils established by Local Government Reform in 2015.

At the time of publication, discussion around the SHRP is still ongoing and unresolved.

Local government reform

Changes to Northern Ireland's local government began on April 1st 2015 and will transform the landscape of local politics in Belfast. The reforms in Northern Ireland are long overdue, having been on the table since 1998. The need to accommodate all parties and communities in public structures resulted over decades in an over-proliferation of councils, council bodies, elected and appointed officials, ultimately

making decision making very complicated, costly and often inefficient. Many services were duplicated in communities that were traditionally divided.

One of the main aims of the reforms is to rationalise the size of area and number of elected officials. Elected local councils in Northern Ireland will be reduced from 26 to 11. The reforms will also transfer functions from the Northern Ireland Executive to the 11 new 'super-councils' including:

- Local development planning;
- Development control and enforcement;
- Enterprise and business development
- Social entrepreneurship, youth enterprise and targeted enterprise support;
- Tourism development;
- Authority to identify buildings of architectural and/or historic interest;
- Neighbourhood renewal and community development (due to be transferred in 2016);
- City centre regeneration (due to be transferred in 2016)
- Off-street car parks
- Functions associated with physical development, e.g. environmental improvement schemes (April 2016).

The new councils will also be granted the General Power of Competence - meaning in broad terms that they will be able to act with comparable freedom to an individual on behalf of the community they serve - unless legally prevented from doing so. The reforms will allow Belfast City Council to act in its own interest and develop innovative approaches to addressing local issues.

Belfast City Council will take in additional 53,000 residents and 21,000 households under the reforms. In order to protect affected ratepayers from possible increased payments as a result of the changes - the Northern Ireland Executive has committed £30 million to subsidise those affected over the four years following the introduction of the reforms across Northern Ireland.

Figure 30: Map of new Belfast Council boundaries - shaded areas show new areas under the Belfast jurisdiction

Source: Belfast City Council, 2015

Devolution from Westminster to Northern Ireland

In addition to the devolution of powers occurring *within* Northern Ireland, proposals are also in place for further powers to be transferred to the Northern Ireland Assembly. While Stormont was suspended from the early 1970s to the late 1990s due to the conflict in Northern Ireland; and again after the peace agreement in 2004 for four years, due to a break down in the cross-party agreement; it has been restored since 2008. There are plans for a major devolution of power from Westminster to Northern Ireland, as well as the process of local government reform which has transferred powers from Northern Ireland central government departments to local government in 2015 and 2016. The implications are significant, particularly for Belfast City Council which has not had responsibility for planning or regeneration.

In his 2014 Autumn Statement, the UK Chancellor of the Exchequer George Osborne proposed the devolution of corporation tax setting powers to the Northern Ireland Assembly. In December a political agreement among the main political parties in Stormont paved the way for the introduction of legislation before the May General Election, with the aim of devolving the tax powers in April 2017.

Supporters of the move argue that it would enable Northern Ireland to compete for investment with the Republic of Ireland which has significantly lower corporation tax rates than the UK (12.5 per cent and 21 per cent respectively). However, any reduction in tax revenues resulting from a cut in corporation tax rates would have to be funded by the Northern Ireland Assembly through corresponding cuts in public spending.

7. Social inclusion

Economic deprivation and inequality

Belfast is one of the most deprived local authority areas of the UK and it has the fifth highest rate of child poverty in the country with just over one third of all children living in poor families⁵⁶. Belfast has higher rates of poverty and deprivation than the rest of Northern Ireland. The percentage of its population considered income deprived in 2010 was 35 per cent, compared to 25 per cent in Northern Ireland as a whole. In 2010 Belfast was the most deprived Local Government District in Northern Ireland with:

- A higher percentage of the population living in the most deprived Super Output Areas (SOAs) in the country
- A higher percentage of the population being income deprived
- A higher percentage of working age people being without jobs

The following table shows this.

Figure 31: Table showing the levels of deprivation in Belfast compared with Northern Ireland

	Belfast	Northern Ireland
Percentage of population living in most deprived Super Output Areas (SOAs) in country - 2010 ⁵⁷	46%	18%
Percentage of population income deprived – 2010 ⁵⁸	35%	25%
Percentage of working age population employment deprived – 2010 ⁵⁹	16%	13%
Homes in fuel poverty (2013/2014)	38.5%	34.2%

Source: NINIS, 2014

The following figure shows that Belfast underperforms compared to the rest of Northern Ireland on work, employment and economic activity.

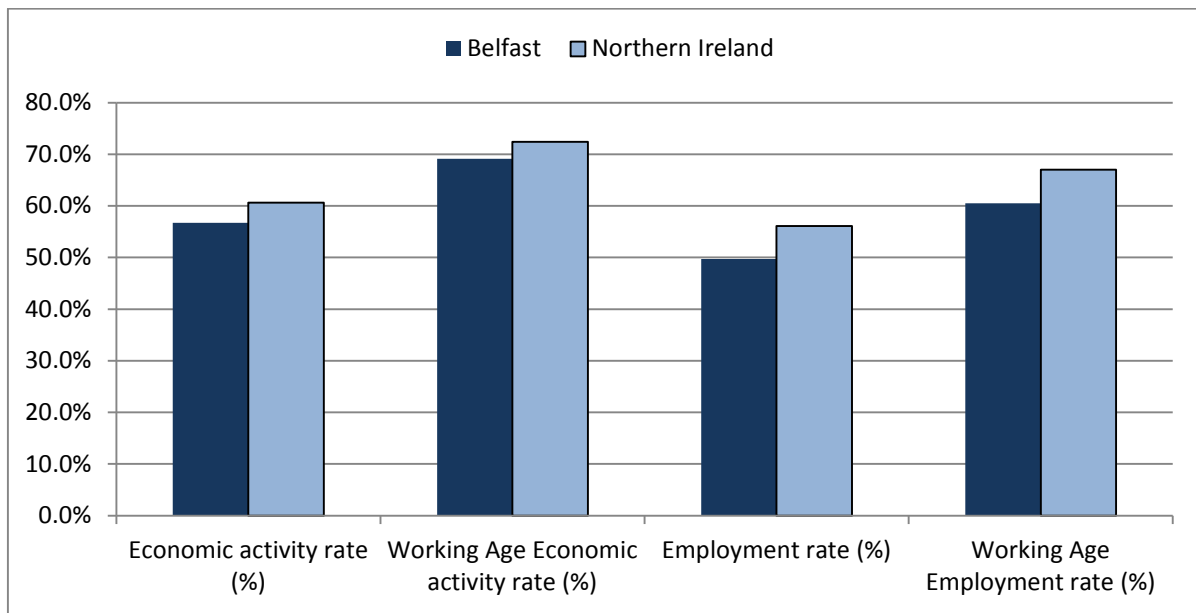
⁵⁶ Child poverty is measured by the percentage of children living in families on out of work benefits.

⁵⁷ This includes 100% of the people living in the top 10% most deprived SOAs plus a proportion of those SOAs in the next two deciles.

⁵⁸ Individuals living in households in receipt of income related benefits and tax credits.

⁵⁹ Individuals of working age involuntarily excluded from work.

Figure 32: Economic Activity (2012)



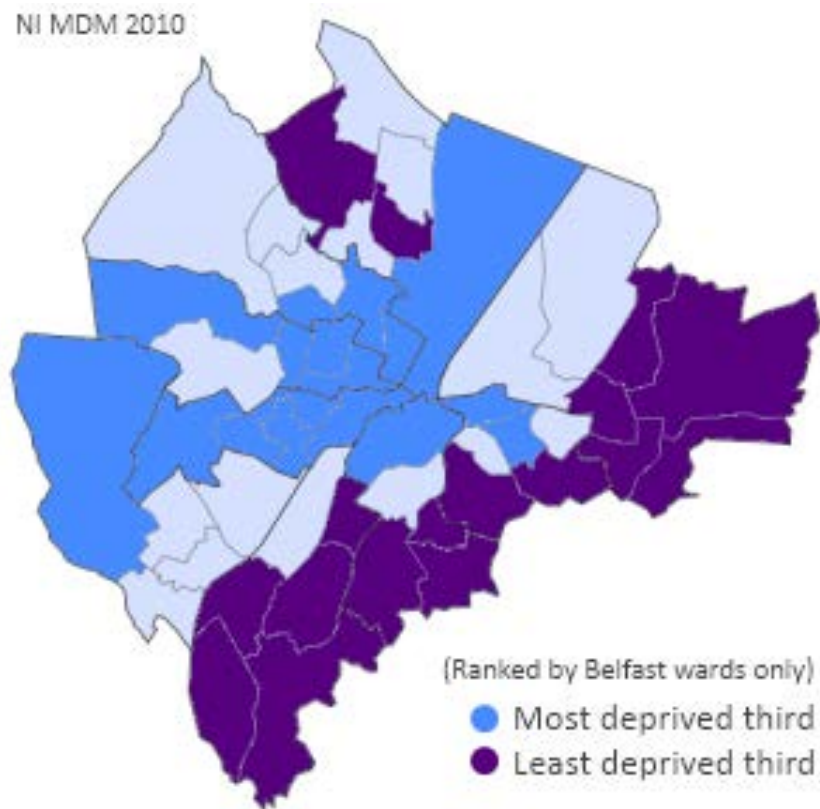
Source: NINIS Economic Activity and Qualifications

As well as having some of the country’s poorest areas, Belfast is home to areas of considerable wealth. It is a highly unequal city. Over three quarters of the most deprived 100 Super Output Areas (SOAs) in Northern Ireland are in Belfast – mostly in the north and west of the city, while many of the country’s least deprived areas are found in the south and east of Belfast⁶⁰. The parliamentary constituency of West Belfast has the second highest child poverty rate in the whole of the UK⁶¹. The map below shows the clustering of poverty and wealth within the city; however, it is worth noting that at a small area level there remain pockets of deprivation and poverty across the entire city. As in other cities, poverty and deprivation is an issue that crosses the political divide.

⁶⁰ Department for Social Development, 2013.

⁶¹ Nolan, 2013.

Figure 33: Multiple deprivation measure rank



Sources: *Index of Multiple Deprivation 2010; Northern Ireland Greenways, 2013*

Education

Northern Ireland and Belfast have high levels of tertiary education compared with other parts of the UK and a very popular and successful grammar school system. The primary school system in Northern Ireland has been very successful in recent years and in 2011 achieved higher scores than any other English speaking country for reading and maths⁶². Northern Ireland consistently outperforms the rest of the UK in exam results and in 2012, its average success rate at GCSEs was 5.5 points ahead of the UK as a whole in achieving 5 A*-C grades.

⁶² Nolan, 2013; Trends in International Mathematics and Science (TIMMS) 2012; Progress in International Reading Literacy Study (PIRLS) 2012.

Figure 34: Northern Ireland GCSE results

HOW NORTHERN IRELAND OUTPERFORMS THE OTHER UK JURISDICTIONS - GCSE RESULTS 2009-2012					
Country	Grades	2009	2010	2011	2012
UK average	A*	7.1	7.5	7.8	7.3
	A*&A	21.6	22.6	23.2	22.4
	A*- C	67.1	69.1	69.8	69.4
	A* - G	98.6	98.7	98.8	99.0
England	A*	7.1	7.5	7.8	7.3
	A*&A	21.5	22.6	23.3	22.3
	A*- C	66.9	69.0	69.8	69.5
	A* - G	98.6	98.7	98.8	99.0
N. Ireland	A*	9.1	8.9	8.5	8.9
	A*&A	27.1	27.5	27.7	27.9
	A*- C	75.1	75.3	74.8	75.6
	A* - G	98.6	98.7	98.7	99.0
Wales	A*	6.2	6.1	6.6	6.5
	A*&A	18.9	19.2	19.5	19.2
	A*- C	66.5	66.4	66.5	65.4
	A* - G	98.5	98.7	98.7	98.7

Source: Nolan, 2013

However, substantial educational inequalities persist in Northern Ireland and a large minority lack the skills needed to find employment. Nearly a third of adults in the province (29 per cent) have no educational qualifications⁶³. This continues to be a problem – 40 per cent of pupils in the province are still leaving full-time education without having achieved basic standards in literacy and numeracy⁶⁴. This includes a total of 10 per cent of pupils that leave school without having achieved a single grade G at GCSE English or Maths⁶⁵. This is far worse than the UK average and it is arguable that the grammar school system serves the more able and more middle class children and will create a large divide with the rest of the population⁶⁶. The school system also reinforces divisions between different faiths. Some examples of integrated cross-denominational schooling are proving popular and successful.

As shown below, Northern Ireland has large disparities in the achievement of its pupils according to gender, school, religion and socio-economic status.

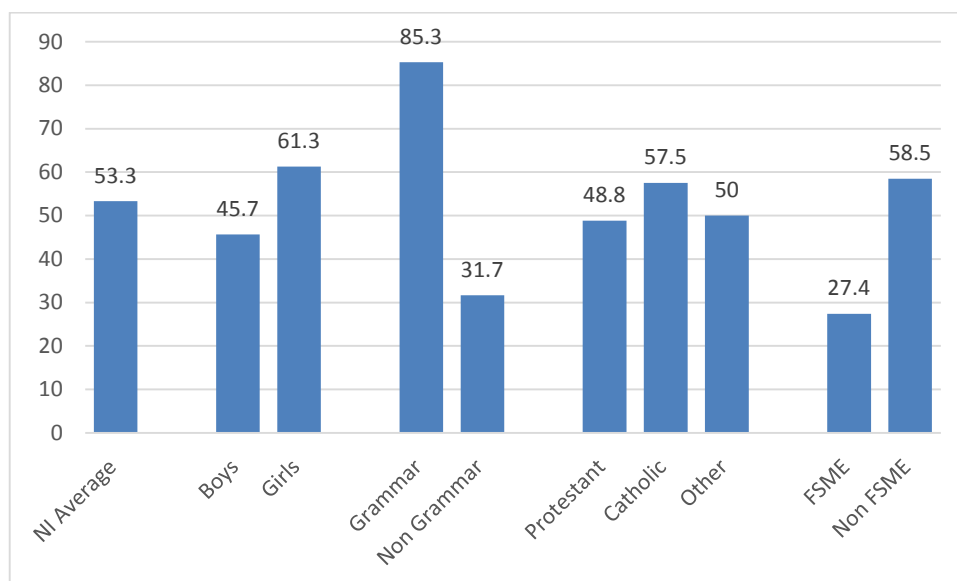
⁶³ Nolan. 2013; Census 2011 data.

⁶⁴ Nolan, 2013; Northern Ireland Audit Office, 2013.

⁶⁵ Nolan, 2013; Northern Ireland Audit Office, 2013.

⁶⁶ Department for Education, 2013.

Figure 35: Percentage of School Leavers in Northern Ireland achieving 2+ A Levels Grades A*-E (including equivalents) 2010/11



Source: Nolan, 2013

NB: FSME refers to Free School Meal Entitlement.

Belfast lags behind the rest of Northern Ireland in terms of school performance. In 2010/11, of the four worst performing parliamentary constituencies in Northern Ireland at GCSE level, three were in Belfast.

Figure 36: School performance in Belfast, Northern Ireland, and the United Kingdom

	Belfast	Northern Ireland
Pupils who achieved Level 4 or above in Key Stage 2 Assessments in Maths in the most disadvantaged primary schools (%) (2011/12)	70.8%	74.6%
Pupils who achieved Level 4 or above in Key Stage 2 Assessments in English in the most disadvantaged primary schools (%) (2011/12)	69.8%	73.9%
Pupils who achieved Level 4 or above in Key Stage 2 Assessments in Maths in <i>all primary schools</i> (%) (2011/12)	78.2%	83.7%
Pupils who achieved Level 4 or above in Key Stage 2 Assessments in English in <i>all primary schools</i> (%) (2011/12)	76.9%	82.8%
School Leavers who gained 5 or more GCSE's at grade C and above (%) (2012/13)	74.0%	78.5%

Source: NINIS, 2014

The Belfast Metropolitan College has in recent years developed a number of innovative programmes designed to tackle the city's skills gaps. Firstly, the College has sought to tackle the problem of graduate unemployment, with Belfast being home to large numbers of graduates but not enough with the skills that match Belfast's growth sectors, such as ICT, cloud computing, data analysis and analytics. In response to this, Belfast Metropolitan College established a pilot programme in collaboration with Deloitte aimed at graduates that have not studied subjects relevant to consulting. It is a 4-month intense programme that brings the graduates up to speed with skills such as Data analytics that are attractive to employers like Deloitte. The pilot was a huge success and the College has run it for a further 6 cohorts since. Other firms have joined Deloitte in collaborating in the programme, including PWC and Alexander Mann. All 170 students that had completed the course by the end of 2014 were subsequently working.

A second skills challenge is in supporting those without basic numeracy and literacy to gain the essential skills needed in the modern workplace. In response to the large numbers in Belfast without basic skills, the Metropolitan College set up a 3-month programme that teaches numeracy and literacy to young people that are not in education, employment or training (NEET). The programme is innovative in a number of ways: it works with community groups to find the young people that are hardest to reach by conventional means; it uses coaches and mentors in local communities to help keep young people on the programme; and it offers taster sessions to allow interested young people to find the course that suits their needs and interests. As a result, the programme has a much higher retention rate than comparable programmes that work with similar groups. The course has been so successful that elements of it are now also being incorporated into some of the College's other courses.

Welfare reform

Northern Ireland has been exempted from many of the welfare reforms and spending rules introduced in the UK over the last 40 year period since the Troubles. Since the UK passed the Welfare Reform Act in 2012, the Northern Ireland Executive has delayed implementing large parts of the latest reform programme.

It took until January 2015 for the main Stormont parties to reach an agreement on the implementation of £250 million of the total £750 million reform programme. This has resulted in substantial delay in the introduction of the bedroom tax, the time-limiting of non-means tested entitlement to Employment Support Allowance, the replacement of Disability Living Allowance, and the introduction of a household benefits cap.

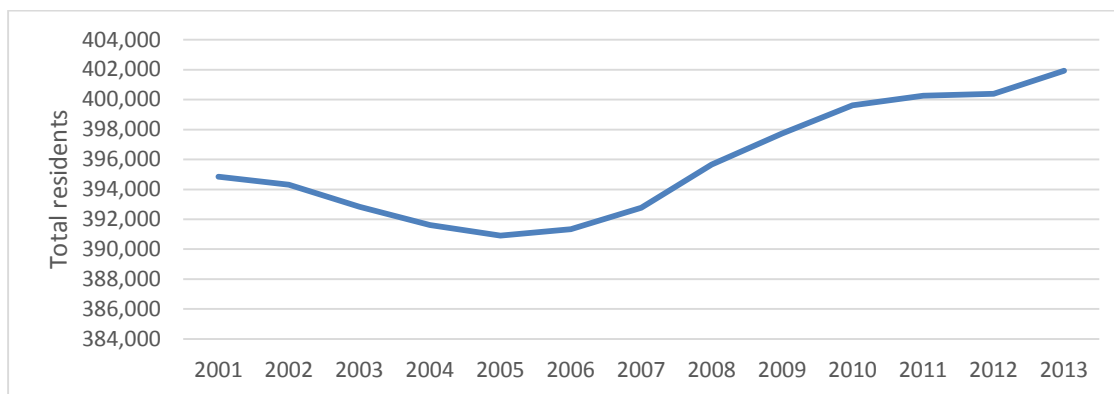
These delays have resulted in a £114 million shortfall in the Northern Ireland Executive's budget for the next financial year, and meant that it has been forced to take an emergency £100 million loan from the UK Treasury. However, if the welfare reforms are introduced in 2015/16, the £114 million deduction from the province's budget will be reduced. A number of 'mitigation schemes' are expected to be introduced in 2015 by the Northern Ireland Executive to reduce the impact of the welfare reforms, including: providing greater flexibility for those receiving universal credit; subsidising those disadvantaged as a result of the spare room subsidy, or 'bedroom tax'; providing discretionary support to those on low incomes and those claiming benefits; the application of the Disability Protection Scheme for those switching to the new Personal Independence Payments; and the introduction of a new Supplementary Payment Scheme.

It is estimated that the Welfare Reform programme will impact on Northern Ireland disproportionately in comparison to the rest of the UK. Although the province only has 3 per cent of the UK population, it faces 4 per cent of the overall financial loss arising from welfare reform. Belfast is particularly badly affected. The financial losses arising from welfare reform are greater in Belfast than in any other major UK city (£840 a year per adult of working age) - higher for example than both Liverpool (£700) and Glasgow (£650).

Demographic trends and implications for social inclusion

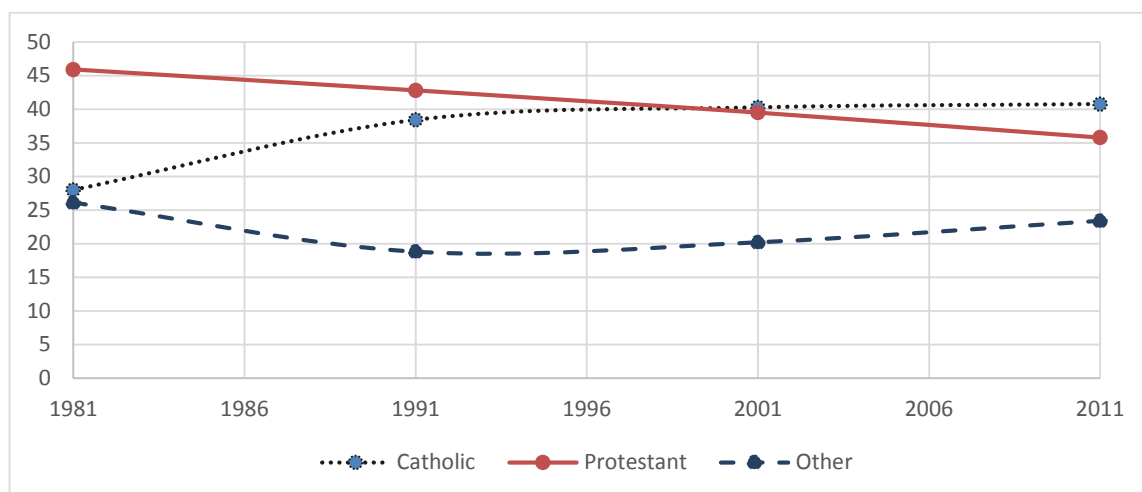
Belfast's population re-growth has been sustained throughout the 2008 recession and the city is expected to continue to grow in the coming years. The trends that are driving that growth may have important implications for social inclusion in the city. Firstly, Belfast's Protestant and Catholic populations are on very divergent growth trends which has posed challenges for the city. In recent decades the Protestant share of the population has been shrinking while at the same time the Catholic population has been growing. This has caused tensions as Catholics are facing over-crowding and increased housing demand while the Protestant communities are reluctant to allow for the need for more housing for Catholics and resist the encroachment into historically Protestant areas of the growing Catholic population. In addition, high rates of immigration into Northern Ireland that were witnessed throughout the 2000s are now slowing. Despite this slow-down, Belfast and Northern Ireland will see increasing numbers of births to women born outside the UK in the coming years. This is due to the migrant populations already in the country, their youthful age and the resulting high birth rates of some of these groups.

Figure 37: Belfast population re-growth



Source: NISRA, Mid-Year Population Estimates

Figure 38: Religion in Northern Ireland by percentage (1981 - 2011)



Source: Census 1981 – 2011

Figure 39: Components of expected population change (2011 – 2021)

	United Kingdom	England	Wales	Scotland	Northern Ireland
Natural increase	57.1	58.2	34.9	29.6	93.6
Net migration	42.9	41.8	65.1	70.4	6.4

Source: ONS, 2009

Sectarian and racial tensions

In some areas of Belfast the divisions that fuelled the Troubles continue today, particularly in several strategic ‘inter-face communities’, where Protestants and Catholics live in very close proximity. Peace Lines (the physical barriers erected to keep the communities apart during the Troubles) continue to exist today - there are still nearly 100 in Belfast⁶⁷. These security divides are usually closed at night and on weekends, but open all day, ostensibly to protect communities from possible hostilities. The Stormont Executive has set a target of having all interfaces removed by 2023 with the consent and support of the people who live there. These areas have been damaged by urban blight and interface communities generally suffer from high levels of deprivation.

Between April and December 2014, the province saw a total of 600 interface incidents - ranging from intimidation and anti-social behaviour to petrol bombings, although there are signs sectarian conflict is declining. In reality, open hostilities and violence have become far rarer than 20 years ago. A recent study found that young people living in inter-face communities consider themselves to be ‘less sectarian’ than

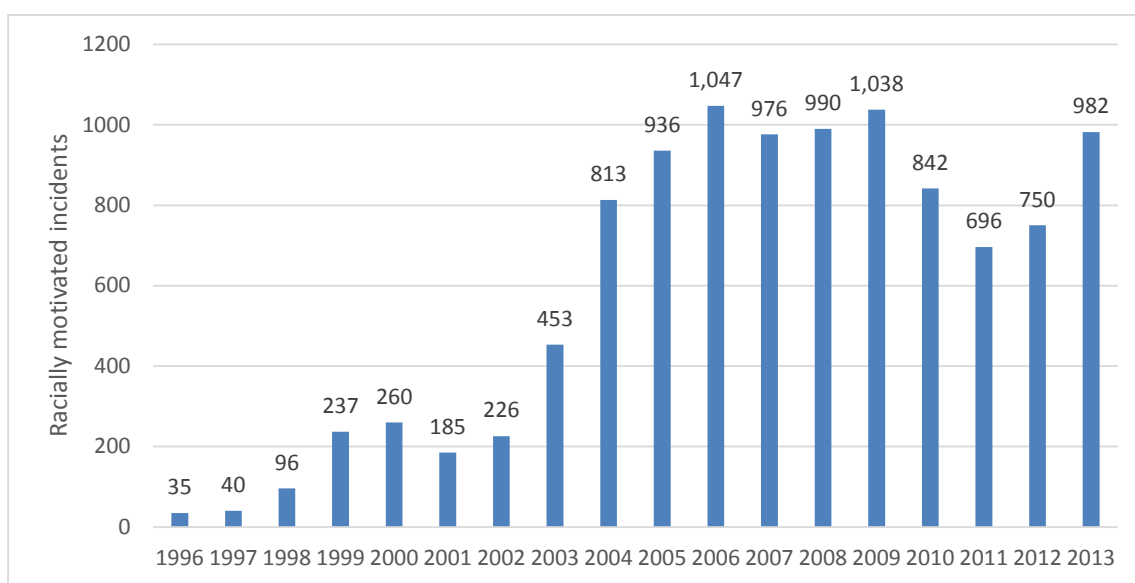
⁶⁷ Nolan, 2013.

previous generations, and believe relations between Catholics and Protestants to be better than they have ever been⁶⁸.

Tackling these issues in inter-face areas, inevitably results in complex negotiation around projects, festivals, events and regeneration projects. A good example comes from the Crumlin Road Gaol site- an historic Victorian jail that has been transformed into a museum and visitor centre. The Gaol lies in the heart of an area deeply affected by the Troubles - it became symbolic of the large volume of untried arrests that happened during the period. Community support for its conversion took a long time due to the sensitivities about the community history. It was closed as a working prison in 1996, but it took until 2009 to agree a way forward before finally being re-opened as a museum in 2012.

As Northern Ireland’s sectarian tensions have eased following the Peace Process, new ethnic tensions have arisen. Following the accession of East European countries to the EU and the Peace Agreement, Belfast has seen an increase in East European migrants along with the Republic of Ireland and the UK. Between 2000 and 2004, racist incidents in the province tripled from 285 to 813. In 2009, a high profile attack on a Romanian Roma community in Belfast led to the evacuation of 115 migrants from their homes to a local church hall for protection against further racist attacks.

Figure 40: Racially motivated incidents in Northern Ireland (1996 - 2013)



Sources: PSNI, 2014; Office of the First Minister and Deputy First Minister, 2002, 2003; Northern Ireland Policing Board, 2006

There was a drop in racist incidents reported in Northern Ireland between 2010 and 2012 with a substantial increase since then. Most of this increase has been focused on Belfast, where the largest concentration of ethnic minorities is found and where racially motivated incidents occur on average once a day. Fostering inclusion for its new communities will be one of Belfast’s major challenges in the coming years.

⁶⁸ Nolan, 2013; Bell. 2012.

8. Neighbourhood and community projects

Northern Ireland has a very active third sector. Its community voluntary organisations employ just under 30,000 people and are supported by around a further 45,000 volunteers. In a typical month, 55 per cent of UK citizens report giving to charity, compared to 73 per cent in Northern Ireland⁶⁹. The province's third sector contributes around 3 per cent of the total GVA of the region's business sector. Belfast is also a particularly prominent location for community organisations. Although it is the location of 12 per cent of all businesses in Northern Ireland, it provides the base for almost 30 per cent of the third sector organisations⁷⁰.

In 1995, Northern Ireland Executive established five partnerships across Belfast which were designed to contribute to the regeneration of the city through the inclusion of the business, community, political and statutory sectors. The partnership areas spanned across Belfast: North, South, West, East and Greater Shankhill. Their core funding comes from the Belfast Regeneration Office - which is linked to the Northern Ireland Department for Social Development (and this will transfer to Belfast City Council in 2016).

One example of how these partnerships have been involved in area regeneration activity is the East Belfast Partnership's success in funding an annual summer Eastside Arts Festival since 2012. This is a welcome addition to the range of festivals in Belfast, previously only 4 per cent of the arts spending in the city went to the East. The latest festival saw a performance by Van Morrison who grew up in the area. One of the partnership's most successful ventures has been the Connswater Community Greenway.

Connswater Community Greenway

The Connswater Community Greenway (CCG) is a £40 million investment in East Belfast. The project has been developed by the East Belfast Partnership and is funded by the Big Lottery Fund, Belfast City Council and the Department for Social Development. The project will create a 9km linear park through East Belfast along the course of three rivers: the Connswater; Knock; and Loop.

The Connswater River was for a long time dirty and neglected. In 2008 it was graded an E on a biological test for pollution levels (letters from C to F were considered below standard). Part of the project will be to clean it and bring it back to life. The Greenway aims to create vibrant, attractive, safe and accessible parkland for leisure, recreation and community events and activities.

The project will improve the quality of life for the people of east Belfast. These include; the 40,000 residents, pupils and students attending the 23 schools and colleges, visitors and tourists to east Belfast and those who chose to work and invest in east Belfast. A whole new greener environment will emerge to link local residents to parks, leisure facilities, businesses, shopping centre, schools and colleges.

When completed in 2016 the Connswater Community Greenway will:

- Create 9km linear park for walking and cycling
- Create 30 new or improved bridges

⁶⁹ NICVA. <http://www.nicva.org/resource/charitable-giving-northern-ireland-2013>. Accessed 3 March 2015; CAF. <https://www.cafonline.org/PDF/UKGiving2012Summary.pdf>. Accessed 3 March 2015.

⁷⁰ PWC. 2013. "A survey of Northern Ireland's third sector and its potential to become more enterprise driven." http://www.detini.gov.uk/deti_-_dsd_3rd_sector_final_report_160513.pdf. Accessed 26 February 2015.

- Serve 23 schools and colleges
- Clean up 5 km of rivers
- Create hubs for education, interpretation points and tourism and heritage trails
- Create a civic square for celebrations and events
- Provide a wildlife corridor from Belfast Lough to the Castlereagh Hills

Phase One of the project was completed August 2014 and Phase Two will start in September 2014 and end by end of 2016.

Figure 41: Connswater Community Greenway



Source: Connswater Community Greenway

Box 3: East Belfast Network Centre – Templemore Avenue

Templemore Avenue School - a former school in one of the most violent interface areas in East Belfast during the Troubles has since been reopened as a networking centre offering facilities and space for both Protestant and Catholic communities living locally. The project aims to support the reconciliation of the two communities in the years to come.

The building has been completely refurbished and has now reopened as the East Belfast Network Centre – a number of services are operating from the building including: an advice centre; a youth project; and a community café.

Work started on site October 2011, previously derelict for 10-15 years, and the building opened in June 2013. The cost of developing the East Belfast Network Centre was around £4.5million. Funding came from a combination of sources including government departments, trusts and private donations.

There is also the Girdwood development in the north of the city – one of the most contested sites – which is being transformed into a shared space with funding from EUSPB Peace III funding and support from BCC working with key community partners and others⁷¹. The Innovation Centre in the west of the

⁷¹ The Department for Social Development and Belfast City Council:
<http://www.belfastcity.gov.uk/business/regeneration/girdwood.aspx>

city is another example. It is hoped will act as a catalyst for the development of the former Mackies site and to complement the Belfast Metropolitan College's E3 campus⁷².

⁷²Belfast City Council, *Innovation Factory*:
<http://www.belfastcity.gov.uk/business/regeneration/innovationcentre.aspx>

9. Concluding thoughts

Belfast's long and troubled history has made its decline much steeper than other industrial cities. However, since the mid-1990s it has undergone a remarkable turnaround, from a city virtually under military occupation to a magnet for urban tourists. It has restored its city centre to public use and has attracted many admiring visitors as a result. It has restored its riverside and port areas in an ambitious regeneration project which is being extended even further. The Northern Ireland government has been restored following 30 years of suspension. Despite a hiatus and many continuing difficulties, Northern Ireland has become largely self-governing again, with greater devolution of powers under way. Formerly divided communities now work together within an agreed political framework.

Belfast was partly sheltered from the big financial crisis of 2008 by the Westminster government because of Northern Ireland's troubled history. The banking collapse in the Republic of Ireland, and the subsequent austerity regime encouraged many to visit Northern Ireland for shopping, tourism and it also encouraged investment opportunities. Delays in implementing the government cuts and Welfare Reform also helped sustain the economy of Belfast for some time with far less severe spending cuts and job losses than in the Republic of Ireland. But with the introduction of Welfare Reform, Belfast expects to be particularly harshly hit due to the high level of benefit dependency in the city.

There have been several breakthroughs in the last few years. One big breakthrough for Belfast is local government reform. Belfast and Northern Ireland as a whole, have been over-governed leading to very complicated and fragmented local authority and government structures, far more than the rest of the UK. Local Government Reform will enhance council's place-shaping and leadership powers which provides an opportunity to transform how services are delivered and potentially eradicate some of the anomalies that have grown up through Northern Ireland's troubled history.

In another major departure, Northern Ireland will be allowed by the Westminster government to reduce business taxes on inward investors by cutting the rate of corporation tax. This should attract more private sector activity and help Northern Ireland reduce its dependence on the public sector. It will also make it more competitive with the Republic of Ireland where corporation tax is extremely low. The Northern Ireland government will have to cut other parts of public spending to fund this tax concession which will limit what is possible; however, it will put Northern Ireland in an equivalent position to the Republic of Ireland and encourage cross-border links - already travel, tourism and investment flows are very significant.

A third success of the rapid growth in the production of renewable energy. This is having a significant effect on the Belfast economy. Belfast Harbour is building new port facilities and expanding capacity to develop a large number of jobs in this field but the industry is in its early days in Belfast. The Northern Ireland Science Park in the Titanic Quarter is the base for the development of special port facilities to allow the construction, shipping and installation of off-shore wind, as well as the production of wind turbines and advanced research in the renewable energy field. It is also the site for the production of the world's first commercially viable sea turbines. These are major breakthroughs for the economies of Northern Ireland and Belfast.

Northern Ireland also has the advantage of strong community engagement, although this has its down sides in housing and schools which remain largely segregated in Belfast. However, community involvement does mean that community projects are readily supported; there is a large volume of community activity; and many residents are willing to volunteer. There is a general sense of strong

community spirit, neighbourliness and friendliness in the city which is widely recognised. This feature helps the process of reconciliation and also helps deliver projects on the ground.

The expansion of higher education, both in the further education field to develop the skills of less qualified young people and at university level, is leading to greater cooperation between the two main universities. The aim is to create greater connectivity through the middle of Belfast from the two university campus locations and further education campus locations which will greatly enhance the city's young population and liveliness.

One of the most remarkable achievements over the last 15 years has been the integration of policing across community and religious divides. Following the Patten Reforms, the Police Service for Northern Ireland now better reflects the population of Northern Ireland. This is a huge advance on the situation that prevailed until a generation ago in the policing of communities in Belfast.

Belfast must tackle some as yet unresolved problems. Firstly, the Northern Ireland government has accumulated significant debt because of the delay in implementing welfare reform. This will limit the budget devolved to local government while the council will have to take on greater responsibility and shoulder a share of the debt burden, higher than the rest of the province due to higher welfare receipts. Secondly, the precarious political balance in the Northern Ireland government raises frequent fears of further stalemate, although the main parties have committed resolutely to working together no matter how difficult. Thirdly, the divided communities are a challenge for more integrated housing and education to which no one has yet found an answer, even though the status quo seems seriously out of tune with modern conditions. Fourthly, there are many low skilled, unemployed people at the bottom of the labour market in spite of Northern Ireland's achievements in higher education, a problem made even more difficult by the weakness of the private sector job market. Fifthly, public transport has long been underdeveloped in Belfast, compared with other British cities, and car congestion is serious. This has partly been reinforced by the legacy of the Troubles. But changes are taking place, with a Belfast Public Bike Share scheme becoming operational in April 2015 in the city centre and efforts to streamline bus services, create bus lanes and introduce far more modern, public transport. Work is now underway to introduce the Rapid Transit Scheme which will improve east-west linkages across the city.

In summary, Belfast faces 6 main challenges:

1. To repopulate the city following extreme suburbanisation - more than other comparable European cities.
2. To push integration and cooperation between the communities to the point where it is a truly shared city.
3. To develop marine and off-shore wind technologies because of the lack of other ready energy sources. This will help meet the European Union and UK ambitions for renewable energy production.
4. To use the corporation tax concession prudently in order not to damage public sector services by budget cuts while attracting more enterprise and investment.
5. To respond to the demographic changes, with the accompanying pressures on schools and housing.

6. To develop a stronger skill-base among lower income communities and to strengthen the growth of the private sector.

All of these challenges are somewhat unique to Belfast, but the signs are good that the city will grasp the nettle and continue along the path of city recovery.

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