



Topic Paper: Employment and Economy

Local Development Plan 2020-2035



Belfast
City Council

Executive Summary

Context

This paper considers the future provision of employment land to enable conditions that will promote new employment, increase economic development and investment. Policy directs towards Belfast as the regional driver and aspires to furthering economic growth and prosperity by competition and innovation.

Employment lands comprises the City Centre of Belfast, the Harbour and North Foreshore as regional significant areas of employment and regional gateways for air and freight which capture a large travel to work area expanding beyond the Council area and a number of key sites of various type and size in local neighbourhoods.

Belfast buildings of industrial heritage and vacant industrial lands offer potential for furthering sustainable development with proper regard to the environment, quality and design. From initial studies it is apparent that presently there is adequate land zoned for employment given that there are Invest NI sites that have not been realised. However a comprehensive review and evaluation of the quality and viability of residual lands is necessary prior to any land use allocations.

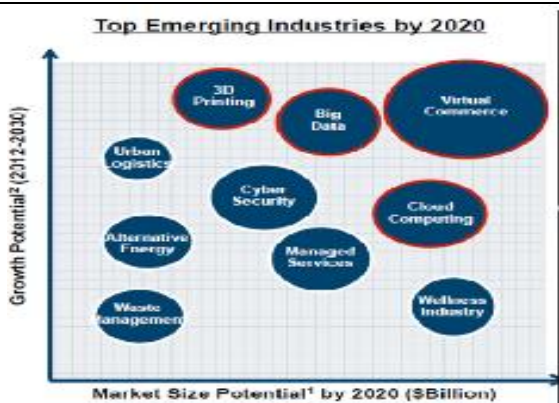
The plan will also consider the infrastructure necessary to facilitate economic growth and investment from better integrating transport so that people can access employment opportunities and providing mixed use land allocations which can encourage business start-ups and expand private sector employment.

Further work is also necessary to determine how many jobs will be required in the future to provide for a growing population; that caters for the population of the region that travel into Belfast Council area for employment and that can alleviate the socio-economic issues of unemployment and disadvantage. The plan will also give consideration of how employment market sectors will grow and change over time and how Belfast can build upon its resources.



Open floor with mezzanine

100-108



Evidence base	Social, Economic & Environmental Factors
<p>Regional Development Strategy (RDS) 2035 – Belfast as regional driver NI Economic Strategy – growth of exports DETI Innovation Strategy – knowledge based Integrated Economic Strategy – growth & prosperity</p> <p>Socio-Economic Profile</p> <ul style="list-style-type: none"> • Large travel to work area (82,000 commuters) • High rate of economic inactivity compared to NI • Highest levels of employment and income deprivation in NI • High levels of persons with no or low skills and qualifications • ¾ Jobs within the service sector (inc retail, health, professional & scientific) • High rate of public sector employment compared to NI <p>Market Context and Forecast</p> <p>Growing sectors – ICT, life and health sciences, agri-food, professional & administration, advanced manufacturing (renewable energy & low carbon technologies), creative and cultural industries, tourism and social economy</p> <p>Emerging sectors - E commerce, big data, 3d printing, cloud computing</p> <p>Key areas Whilst is evidence is applicable throughout the whole area the key areas for employment use are:- Belfast City Centre; Harbour (Dunclue, Titanic, Airport) & North Foreshore</p>	<p>How can the LDP encourage investment and economic competitiveness?</p> <p>How can the LDP promote sustainable use of vacant lands and buildings of industrial heritage?</p> <p>How can we ensure there is appropriate land in place to match the demand for jobs?</p> <p>How can the LDP ensure that everyone has access to jobs? Especially within areas of employment deprivation?</p> <p>How can the LDP promote connectivity and reduce journeys to employment areas?</p> <p>Opportunities</p> <p>Promotion of harbour growth and transport hubs for exports</p> <p>Maximizing potential of vacant lands and buildings through either urban remodelling and/or providing fit for purpose accommodation for all sectors of industry?</p> <p>Enabling Innovation/Creative Hubs to develop, encouraging, opportunities and support for business start-ups in private sector</p> <p>Ensuring growth of student campus/facilities to build a learning city and knowledge economy and providing skills and vocational courses linked to the growth sectors</p> <p>Promote clusters of economy of small businesses through mixed uses</p>

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1.0 Introduction

- 1.1 This is one of a series of 17 topic papers which have been put together to inform the Sustainability Appraisal Scoping Report for the Belfast Local Development Plan (LDP).
- 1.2 Each topic paper provides a summary of the evidence base required for the Sustainability Appraisal, Preferred Options Paper and Local Development Plan. They establish a baseline position and identify the key issues that need to be addressed.
- 1.3 By combining the evidence gathering stages for both the Sustainability Appraisal and Local Development Plan, we aim to streamline the documentation produced and avoid duplication. It will also help to ensure that sustainable development is embedded in the planning process and that sustainability appraisal is one of the main drivers informing the preparation of the Local Development Plan.
- 1.4 Each topic paper can be read separately but, inevitably, there are important related matters in other topic papers and background evidence.

Member Workshops

- 1.5 The Topic Papers were drafted in the early part of 2016 to provide elected members with baseline information to inform the preparation of the Local Development Plan. As such the information presented within this topic paper is intended to:
- Build the capacity of the members to make informed planning decisions, particularly within the plan making context;
 - Provide baseline information which will inform Development Plan Policy making at a local level;
 - Consider the Settlement Hierarchy within the new Belfast Local Government District;
 - Assess the land use needs of a growing population within the Belfast City Council area and to consider the adequacy of the existing growth strategy; and
 - To link with important ongoing work in relation to the development of a Community Plan (the Belfast Agenda) and other strategic work being undertaken by the Council.
- 1.6 These papers were presented to members for discussion at a series of informal workshops with Planning Committee Members throughout the Spring 2016, with key issues and opportunities for the City identified for consideration.
- 1.7 The original Topic paper entitled “ ” was presented at a workshop on 18 February 2016. It has since been updated to ensure the statistics referenced are up to date for publication alongside the Preferred Options Paper.

Employment and Economy

- 1.8 The purpose of this paper is to inform Council on how the provision of employment land is to be addressed in the future. It sets out the regional context for economic development, the supply of industrial zoned land and extent of past take up and an examination of the

employment and economic base of the new Council area. It provides an indication of how many jobs are required to both cater for a growing population and to address issues such as unemployment and deprivation. How these jobs can be accommodated across employment sectors and translated into a need for additional employment land up to 2030 is also considered. This paper allows members to consider of how economic policy may be formulated within the context of the RDS and the Strategic Planning Policy Statement.

- 1.9 Any future decision making will need to be made within the context of a Sustainability Appraisal under the provision of Planning (Northern Ireland) Act 2011. This paper is therefore intended to generate members' ideas on how planning can best meet the needs of Belfast LGD.
- 1.10 It is important to stress that in compiling the Position Paper the best information available has been used however, it may need revised in light of the release of any new data. The paper will provide a foundation on which work can commence on a Preferred Options Paper as part of introducing the new Plan Strategy for Belfast City Council to replace that contained in the existing Belfast Metropolitan Area Plan.

2.0 Policy Context

Strategic Context

- 2.1 Europe 2020' Strategy adopted by the Council in 2010 states three priorities as smart growth, sustainable growth and inclusive growth and five targets to raise employment rates, invest in Research and development, meet 20/20 climate/energy targets, increase third level education and to reduce poverty and social exclusion. Draft Programme for Government cites economic growth through rebalancing and rebuilding the economy as the top strategic priority.

Regional Context

- 2.2 The Regional Policy context is provided by the Regional Development Strategy (RDS) 2035 and regional planning policy statements.

Regional Development Strategy (RDS)

- 2.3 The RDS 2035 provides a framework for strong sustainable economic growth across the region and recognises that a growing regional economy needs a co-ordinated approach to the provision of services, jobs and infrastructure. It provides Regional Guidance to ensure an adequate supply of land to facilitate sustainable economic growth. RG1 ensures that there is adequate supply of land to facilitate economic growth. Land should be accessible and located to make the best use of available services, for example water and sewerage infrastructure, whilst availing, where possible, areas at risk of flooding from rivers, the sea or surface water run-off. Other regional guidance promotes transport infrastructure, telecommunications infrastructure, tourism infrastructure and delivering a supply of energy.
- 2.4 The Metropolitan Area of Belfast is one of the key components of the Spatial Framework Guidance. SFG3 enhances the role of Belfast City Council as the regional capital with focus on admin, commerce, specialised services and cultural amenities. SFG1 promotes urban economic development at key locations throughout the BMUA specially focusing on the Belfast Harbour Area and directing mixed use development towards sites such as the Titanic Quarter, Crumlin Road Gaol, The North Foreshore and the Harbour to act as catalysts for regeneration. Belfast Port is an important area for industry and trade occupying 19% of the council area and is set to grow further as the employment potential of Titanic lands are realised.
- 2.5 SFG 4 manages the movement of people and goods within BMA to integrate land use and transport so that people can access employment opportunities. Belfast LDG is the regional city gateway for the seaport and the City Airport and SFG15 strengthens these gateways for regional competitiveness of goods and passenger traffic and further recognises that the region can benefit from collaboration with its North/South and East/West neighbours to boost economic performance.

- 2.6 The quality and viability of sites zoned for economic development uses in area plans should be assessed against an Employment Land Evaluation Framework (Appendix 1) which will enable authorities to identify robust and defensible portfolios of both strategic and locally important employment sites in their development plans. This means protecting zoned land in development plans and, in order to capitalise on the development opportunities provided by a concentration of people, goods, available infrastructure and business, promoting economic development opportunities in the regional capital of Belfast.

Strategic Planning Policy Statement (SPPS)

- 2.7 The Strategic Planning Policy Statement (SPPS) was adopted in September 2015 to replace DOE PPS's as an aid to shorten and simplify the guidance. The SPPS sets objectives to:-

Promote sustainable development in an environmentally sensitive manner

Tackle disadvantage and facilitate job creation by ensuring the provision of a generous supply of land suitable for economic development and a choice and range in terms of quality, size and location to promote flexibility and meets specialised needs of specific economic activities.

Support the re-use of previously developed economic development sites and buildings where they meet the needs of particular economic sectors

Promote mixed use development and improve integration between transport, economic development and other land uses, including housing whilst ensuring compatibility and availability by all members of the community

Ensure a high standard of quality and design for new economic development

- 2.8 A system to monitor the take-up and loss of land allocated for economic development purposes should also be put in place so that any shortfalls can be identified.
- 2.9 The SPPS expresses the need in the interests of sustainability to restrict new building purposes outside settlements. PPS21 Sustainable development in the countryside sets out appropriate farm diversification and other economic activity. Following Local Government Reform Belfast City Council has extended to include lands in Colin Glen, Cave Hill, Lagan Valley Regional Park, Belvoir Park, parts of the Craginlet Hills, the Castlereagh Hills and three small settlements of Hannahstown, Edenderry and Loughview but the Council remains contextually urban. Policy is to cluster, consolidate and group new development with established buildings and the re-use of previously used land and buildings. Policies and proposals such as farm diversification, agriculture, forestry development, tourist accommodation and re-use /conversion of buildings may be considered by the LDP.
- 2.10 The RDS is complemented by the DOE's Strategic Planning Policy Statement (SPPS) Planning Policy Statements, the most relevant of which is PPS 4 Planning and economic development which sets of the Departments planning policies for economic development uses and indicates how growth associated with such uses can be accommodated and promoted in development plans. Its remit covers industrial, business and storage and distribution uses as currently defined in Part B "Industrial and Business Uses" of the

Planning (Use Classes) Order (Northern Ireland) 2004 which has since been updated to the Planning (Use Classes) Order (Northern Ireland) 2015. For the purposes of this policy economic development uses comprise the following:-

Class B1: Business

As an office other than within Class A2 (financial, professional or other services);

As a call centre

For research and development which may be carried out without detriment to amenity

Class B2: Light Industrial which can be carried out without detriment to amenity

Class B3: General Industrial for carrying out of industrial processes other than one falling within B2; and

Class B4: Storage or distribution.

- 2.11 PPS4 may also be applicable to assessing proposals for other sui generis employment uses which are land uses which do not fall into any particular use class in the Use Classes Order.
- 2.12 The key aim of this PPS is to facilitate the economic development needs of the Region in ways consistent with protection of the environment and the principles of sustainable development. It recognises that changing patterns of employment in NI require more flexible approach when determining the types of economic development that are acceptable in particular locations. For instance, high technology, knowledge driven enterprises and light industry and Class B1 high technology office uses may be compatible within an area allocated for general industrial development or modern low impact industries within residential areas without causing unacceptable disturbance and adverse impact upon amenity. It also directs Development Plans to include the safeguarding of existing expansion of this use. PPS4 details particular matters that should be assessed as appropriate in the course of preparing a development plan. A development plan will therefore provide information such as acceptable employment uses, key site requirements and economic needs etc.
- 2.13 Under the provisions of PPS4 Industrial zonings can comprise of proposed and existing industrial lands consideration should be given to identifying these as economic zonings to protect the land for economic purposes.
- 2.14 PPS5 Retailing and Town Centres also covers employment and economic development insofar that they relate to retailing and offices to be explored in further papers.
- 2.15 PPS13 Transportation and Land Use policy recognises the importance of Belfast in the regional strategic transport network providing links to infrastructure for freight and tourism both which will be examined in further papers.

Anti-Poverty and Social Inclusion Strategy

- 2.16 The Government's "Anti-Poverty Strategy" Lifetime Opportunities was published was published by the Office of the First Minister and Deputy First Minister in 2006. It outlines a

set of long-term goals and targets to work towards eliminating poverty and social exclusion in NI by 2020. A main function of the LDP is to facilitate development and create a framework to enable investment. The re-use of previously developed land can support this strategy and assist with economic regeneration and physical renewal, stimulate enterprise in disadvantaged areas to tackle long-term unemployment.

NI Executive Economic Strategy: Priorities for Sustainable Growth and Prosperity

- 2.17 The NI Economic Strategy was published by the Minister for DETI in March 2012 with the overriding vision to improve economic competitiveness by growing the export-driven private sector. This is to be achieved by stimulating innovation and research and development, improving skills, competing in the global economy, encouraging business growth, diversifying the local export base and establishing economic infrastructure. The long-term goals for the region are to grow those areas of greatest potential such as telecommunications and ICT, advanced engineering and materials. Emerging growing sectors such as business and financial services, the green economy sector, creative industries, tourism and the social economy are of importance.

DETI Innovation Strategy for Northern Ireland 2014 – 2025

- 2.18 The DETI Innovation Strategy was published by the Minister for DETI in September 2014 with the vision that by 2025 Northern Ireland will be recognised as an innovation hub and will be one of the UK's leading high-growth, knowledge-based regions which embraces creativity and innovation at all levels of society. The strategy aims to achieve this through cultural change; knowledge generation; knowledge exchange through engaging and collaboration between businesses and academia and knowledge exploitation through the transformation into products and services which can be exported. The Strategy supports the expansion of the NI Science Park and creation of open innovation centres. The NI Innovation Strategy promotes key market sectors where Northern Ireland has both the capability and the potential to compete on a global basis:
- Agri-food technology: Integrated value chain, traceability, niche / functional food, packaging and shelf life;
- Advanced manufacturing and materials: Advanced engineering, composites, electronics and electrical components;
- ICT: Software engineering, Big Data / Data Analytics, Cyber Security, Capital Markets and Digital Content).

Belfast City Council Social Clauses Framework

- 2.19 Social clauses are defined by the Cabinet Office as “requirements within contracts or the procurement process which allow the contract to provide added social value through fulfilling a particular social aim”. The Strategic Investment Board initially developed the Social Clauses toolkit that focused on construction contracts. This was reviewed and they and recently completed the Buy Social Toolkit <http://www.buysocialni.org/>. The document states that from April 2016 the Buy Social requirements are to be used in procurement above £2M for construction and above £4M for civil engineering.

- 2.20 Belfast City Council adopted a Social Clause Policy in January 2016 on an interim basis and agreed to review it within 18 months to take into consideration changes in the operating context across local and central government.

Belfast Integrated Economic Strategy 2015-2020

- 2.21 The Integrated Economic Strategy for Belfast was commissioned by Belfast City Council and Invest NI. The Strategy set out the key aspirations and priorities for Belfast City Council, Invest NI and partners in respect of the economic growth and prosperity of the Council area. The Strategy was developed around five themes of a competitive and internationally connected city; a learning city; a people centred and inclusive city; a sustainable city and an accountable city. The economic synopsis makes forecasts regarding population increase and suggests an additional 8,000 jobs that could be created between 2012 – 2025; future deprivation challenges; suggests unemployment levels of 7% of the working age population in 2022 and business challenges of entrepreneurship, business start-ups, social enterprise and FDI growth, employability and skills challenges and challenges and opportunities within different sectors.
- 2.22 There has been an improvement in the skills base over time but still gaps remain, especially in relation to the population with low or no qualifications. Progress is required to develop the skills base as a platform for the long term economic vision.

Local Policy Context

Belfast Agenda

- 2.23 There is a statutory obligation for the evolving Local Development Plan to take account of the Community Plan known as the Belfast Agenda and is about agencies working together with local communities to make a difference. It will be a joint vision for Belfast created in partnership with key partners, residents and community organisations to outline how the Council will work with statutory, business and community partners to shape future development and growth by setting medium and long term goals for social, economic and environmental improvements over the next 15 years. A number of Belfast Conversations have been held across the city and draft outcomes and high level aspirations are emerging. A draft Agenda is to be and the first community plan will be published in 2017. The emerging priorities include business and economy; living here; working and living and City development. The 'pillar' of business and economy aims to attract more investment, foster business growth, strengthen business relationships and make Belfast easy to do business with and that of 'working and learning' aims to address educational inequalities, attract and retain skilled people and match skills and employability to opportunities across Belfast.

Belfast Metropolitan Area Plan 2015 (BMAP)

- 2.24 This plan covers the former City Council Areas of Belfast and Lisburn and the Borough Council Areas of Carrickfergus, Castlereagh, Newtownabbey and North Down. Insofar as related to Belfast, this plan categorised proposals by the City Centre; the Harbour Area; Arterial Routes; Outer Belfast; the rural area and Lagan Valley Regional Park.
- 2.25 The BMA employment strategy seeks to sustain balanced economic growth and job creation by promoting city and town centres; providing a generous supply of land and promoting a balanced portfolio of sites through the zoning of a complementary range of sites on regional gateway and major transportation corridor sites; mixed use/regeneration sites close to areas of disadvantage/social need and/or in need of economic or community regeneration; sites along transportation routes and on established areas of existing employment.
- 2.26 The strategy also lists a hierarchy of sites which includes Major Employment Locations at Belfast Harbour, West Lisburn/Blaris, Purdysburn/Knockbracken and Global Point/Ballyhenry; Key Employment Sites to include the North Foreshore and Monagh Bypass; Mixed Use Sites at Crumlin Road and Barbour Threads, Lisburn and Key Local Employment Sites to include Millmount, Dundonald, Mallusk, Newtownards Road, Bangor and Lissue and Knockmore, Lisburn and various within the Metropolitan Rural Area. Major Employment Locations such as the Harbour are regional gateways and major transportation corridors and would accommodate limited office developments and Mixed Use Sites such as Crumlin Road are lands of former major industrial sites to be redeveloped to support local economic and community regeneration.

Belfast City

- 2.27 The strategic vision for Belfast city is to promote it as the regional capital and major focus for regional administration, commerce, specialised services, cultural amenities, employment and development opportunities. It is the leading regional shopping centre and primary office location with the largest concentration of employment and commercial floorspace in Northern Ireland. The City Centre is at the core of the Regional Strategic Transport Network and transportation hub for the Metropolitan Urban Area.
- 2.28 The City Centre includes some of the city's most prominent civic and historic buildings, primary pedestrian routes, the river and waterfront, former industrial and port lands, the primary office area, the Cathedral Quarter an area of cultural and heritage, entertainment areas, gateways and accessibility nodes and the orbital boulevard. The plan defined the boundary of the city centre by the inner ring road, orbital boulevard and the east bank of the River Lagan between the Albert and Queens Bridges. The City Centre includes the site of the new Transport Hub a key arrival point and link towards the Linen Quarter.
- 2.29 The Harbour Area has a vital role in the promotion of Belfast as the regional capital and focus for major employment opportunity. Port lands encompass 1565ha on the former

Harland and Wolff Shipyards on Queens Island now referred to as the Titanic Quarter; Duncrue Industrial Estate, the North Foreshore and George Best City Airport.

- 2.30 The Harbour Area Strategy seeks to facilitate and promote further development of the Port and Airport the major gateways to Northern Ireland by sea and air; provide employment opportunities to strengthen the role of BMA as the regional economic driver and improve accessibility.

Harbour

- 2.31 Belfast Harbour is a major employment location extending for approx 800ha to include the site of a former terminal building on a small portion of land abutting the Sydenham Bypass to the southeast of the City Airport.

Figure 1: Belfast Harbour Area (BMAP 2015)

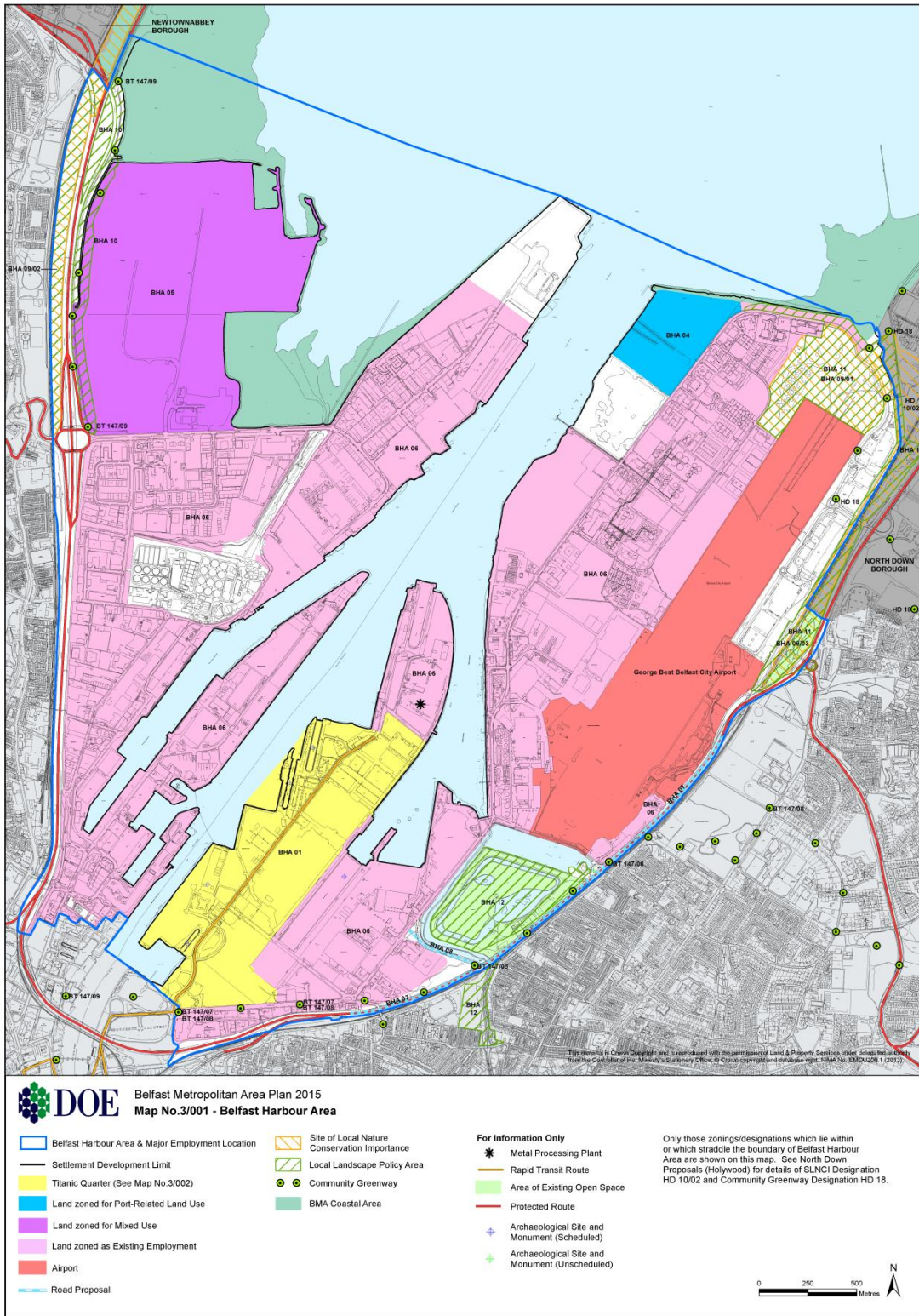
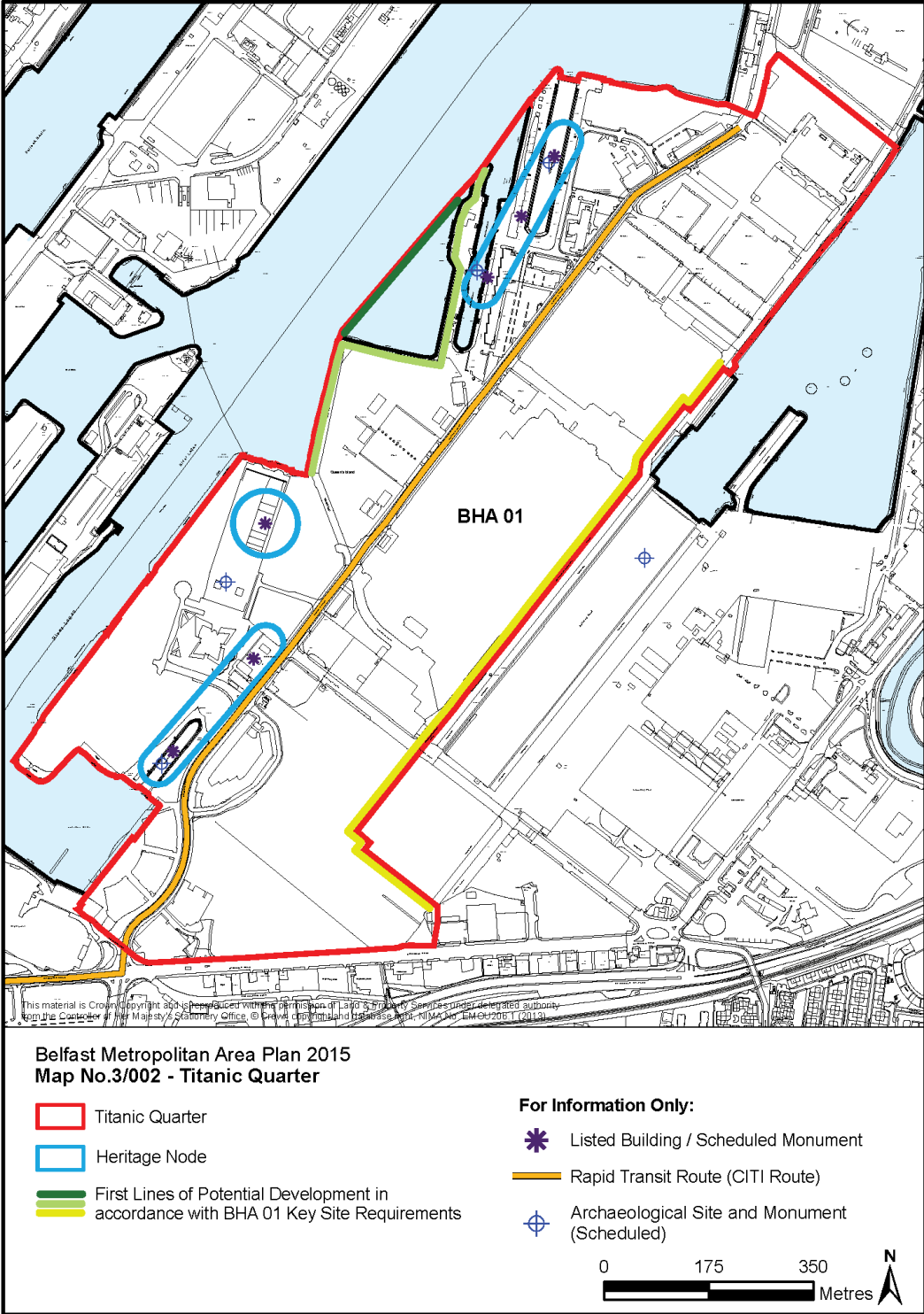


Figure 1: Titanic Quarter (BMAP 2015)



North Foreshore

- 2.32 The plan zoned 127.2ha of land within the North Foreshore for mixed development to include uses for waste management and recycling facilities; port and port-related land uses; Class B1 – B4 uses as defined in the Order and open space and associated facilities. An Environmental Resource Park known as Giants Park has been recently granted permission within this zoning. Recently planning permission has been granted for a film studio and workshop within Dargan Road.

Port

- 2.33 A significant proportion of land within existing employment lands are identified for port related operations. The plan zoned 19.1ha of land known as D3 which has been infilled and is used for port related activities which would require a waterside location such as terminals, loading and discharging facilities.

George Best City Airport

- 2.34 The development plan gives favourable consideration to proposals that are clearly related to and dependant on a site near the airport in order to capitalise on the potential provided by the concentration of people and goods at the regional gateway. Such airport related employment uses may include airline sale/reservation and booking offices, maintenance, supply and manufacture of airport equipment and warehousing for freight handlers for example. Bombardier Aerospace a worldwide manufacturer of aerospace/aeronautical equipment is situated within proximity to the airport.

Titanic

- 2.35 The Plan zoned 87.31ha with the Titanic Quarter for mixed use including employment within business uses as specified in Class B1 (a), (b) or (c) of the Planning (Use Classes) Order (Northern Ireland) 2004 updated in 2015 and light industrial use as specified in Class B2 of the same Order. Key site requirements state that the total amount of floorspace for Use class B1 (a) Offices shall not exceed 15000sqm but proposals above and beyond will be considered where it can be demonstrated that it cannot be accommodated within BCC and would otherwise result in a loss of inward investment. This area now comprises apartments within Abercorn Basin, Thompson Dry Dock and Pump House tourist facilities, Belfast Metropolitan College and sports complex, office buildings, an exhibition hall, a hotel within former Drawing Offices and film studios. A portion of land to the western waterfront has been reclaimed to form part of the zoning.

Outer Belfast

- 2.36 Whilst the City Centre is the principal focus for employment BMAP also zoned 49ha of land for mixed use and 217ha of land as existing employment within 35 sites across the Belfast

Council District to include former employment sites within Castlereagh and Lisburn Districts in order to facilitate future employment opportunities and protect from inappropriate non-employment based land uses. Acceptable uses on employment zonings except where otherwise stated in key site requirements include Classes B1 – B4 uses within Business, Industry and Distribution. BMAP specifically details key site requirements for those mixed use sites at the Monagh Bypass, Crumlin Road, Girdwood Barracks and the former Mackie's site on Springfield Road.

- 2.37 Lands at Monagh Bypass/Upper Springfield Road comprise 36ha of land zoned for mixed uses. There is an extant outline planning permission for mixed use development which was granted in 2013 to include Class B1 (a) offices totalling 1000sqm and not exceeding 200sqm individually.
- 2.38 Land at Crumlin Road to include the Girdwood Barracks comprise 12.53ha for mixed uses insofar as related to industry uses within Class B1 (a restricted to the existing Gaol and Courthouse buildings), (b) and (c), B2, B3 and B4. The Girdwood Community Hub, a multi-use sports pitch and housing are now built and occupied.
- 2.39 Existing employment lands at the former Mackies site on Springfield Road comprise 19ha of lands for industrial and business uses. An innovation centre comprising 5560sqm of lettable space of which a maximum of 1400sqm of class B1(a) 0.85ha of the site has now been constructed and is part let.
- 2.40 There are notable areas zoned for existing employment at Kennedy Way and Springfield Road; Prince Regent Road and Castlereagh Industrial Estate within the former Castlereagh District council areas and Springbank Industrial Estate within the former Lisburn District Council. The resultant areas zoned for employment average approx 3ha in size.

3.0 Economic Profile

- 3.1 Belfast developed as a market place and port around the 17th and 18th centuries with the largest period of growth around the late 19th and early 20th centuries resulting from the manufacturing industries of linen and shipbuilding. These industries have since declined in importance and are now offset by increased employment within the service sectors. Belfast today displays great economic optimism, following a period of economic growth, political stability and civic confidence. But there are pockets of social and economic deprivation within our city. Suburban expansion was accompanied by a dispersal of employment facilities and shift in employment from manufacturing industries which has resulted in pockets of land dereliction such as the Sirocco site. However, significant investments have resulted in regeneration increasing the appeal of the City. Belfast has become an attractive city for migration with approx 9% of the resident population born either in the EU or outside the EU, which has increased the working age population.
- 3.2 An understanding of Belfast's economic performance is one of the key factors in determining the well-being of Belfast, essential in assessing the provision of economic development land. Reference is made to the regional and national situation for the purpose of comparison.
- 3.3 Whilst the range of statistical data facts and figures is vast the key ones listed represent Belfast existing employment and skills profile. Issues to be mindful of in Belfast however, include those wards with persistent levels of multiple deprivations within the region in terms of education, income and employment, deprived from lack of and low qualifications (some 30% of the work age population) resulting in high levels of youth unemployment and wards which comprise the highest claimant counts in Northern Ireland and levels of economic inactivity.
- 3.5 A Vibrant economy that provides job opportunities for everyone must have a diverse range of growing sectors. Lower skilled jobs are more vulnerable to technological change and higher skills will be required.

Belfast Existing Employment Base

Belfast LGD working age population stands at 221,445 persons
Employment rate NI measures 68.4% comparison to Uk average of 73.4%

29% total jobs across NI based in Belfast and 46% in the Belfast Metropolitan Area reflecting the concentration of economic activity

Table 2 Jobs by sector 2013

	Total No of jobs	No in production/manufacturing	No in construction	No in distribution services	No in other services	Other
Belfast	210,424	12,011 (6%)	4,860 (2%)	32,956 (16%)	160,530 (76%)	0
NI	691,501	83,915 (12%)	29,382 (4%)	146,924 (21%)	430,465 (62%)	815 (0.1%)

(Belfast Regional Briefing, August 2015)

Future

- NI unemployment rate was 6.2% compared to 5.5% in the UK
- Belfast LGD travel to work area covers 2690sqm comprising 81,094 commuters representing 52% workplace population.

Figure 2: Belfast Travel to Work Area (in green)



- 3.6 According to the research, the expected path for future employment growth is broadly positive. It is estimated that current overall employment in the city is around 245,000. This is 38,000 more than in 2001 and with the exception of two years (2009 and 2012) when 10,000 jobs were lost, figures have been on a consistent upward trend. In fact since 2012, Belfast has gained 14,000 more jobs across all sectors.
- 3.7 The baseline scenario, is the estimation of the most likely economic outcomes for economy to 2035, which would result in a period of slight employment decline until 2019 followed by a return to growth from 2020 onwards. Between 2016 and 2035, this forecast suggests that Belfast's employment would be 46,000 higher than current levels. The upper scenario would result in considerably stronger job creation, adding a further 23,000 above the baseline scenario and resulting in total employment of around 286,800 in 2035.

Table 1: Demand for B Use Class Employment Space, 2016-2035, sensitivity analysis

		No Sensitivity Applied		Capacity of 10%		Capacity of 20%	
		Base Scenario Sq M	Upper Scenario Sq M	Base Scenario Sq M	Upper Scenario Sq M	Base Scenario Sq M	Upper Scenario Sq M
B1A	General Offices	283,643	510,286	255,279	459,257	226,914	408,229
B1B	R&D Space	36,643	81,429	32,979	73,286	29,314	65,143
B1C	Light Industrial	33,929	89,571	30,536	80,614	27,143	71,657
B2	Industrial & Manufacturing	6,786	25,786	6,107	23,207	5,429	20,629
B8	Storage & Distribution	103,143	157,429	92,829	141,686	82,514	125,943
B Mixed Class	Small Business Workspace	143,857	253,786	129,471	228,407	115,086	203,029
	Total	608,000	1,118,286	547,200	1,006,457	486,400	894,629

- 3.8 In the baseline scenario, with no allowance made for existing capacity, Belfast will require a total of 608,000 sq m of employment space for B Use Classes between 2016-2035, whilst in the upper scenario, this is forecast to rise to 1,118,286 sq m. Focussing on the baseline scenario, the largest requirement will be in B1A use class - General Offices. This use will require an estimated one third of the total requirement. Small business space (B Mixed Class) and Storage and Distribution (B8 Class) are also estimated to require over 100,000 sq m each.
- 3.9 Of course, not all future demand will require new buildings. Many businesses will expand within their current footprint and vacant property will also be absorbed, if fit for purpose. It was beyond the scope of this research to audit current provision of the extent to which employment growth in Belfast can be absorbed by current provision. Rather, sensitivity analysis has been applied to the numbers above on the basis that a) 10% and b) 20% of employment growth can be absorbed by current provision. These assumptions can be revised should data become available.

- 3.10 It should be noted that independent research commissioned by the Council to assess employment space requirements across the city consider the full range of economic uses, including retail, professional services and hospitality (Class A), hotels (Class C1) and leisure/cultural uses (Class D2).
- 3.11 Although the labour supply of skilled residents is set to improve, there is still forecast to be a considerable oversupply of lower skilled labour, meaning that for many, the labour market prospects are difficult as it stands. In addition, although there is forecast to be an improvement in the employment rate, the structural problems will remain and welfare reform is likely to make the situation worse for many low skilled people on low wages.
- 3.12 In Belfast the largest share of employment is based in the services sector which will be set to grow through further employment within tourism, retailing, hospitality, ICT and communications and financial.
- 3.13 There are a number of established and emerging facilities and initiatives within the local government district which build upon the City's resources and potential. These include infrastructure investments at North Foreshore and Forthriver Business Park as well as a range of business start up and growth activities supported by organisations such as Belfast City Council and Invest NI.
- 3.14 Opportunity sectors include telecoms and ICT, professional & administration (particular legal & financial admin), advanced manufacturing (renewable energy & low carbon technologies), life and health sciences, creative and cultural industries, tourism and the social economy. The RDS recognises Belfast as the regional capital and gateway for movement of people and goods through the seaport and airports. A strategic and integrated transport network sits at the heart of increasing economic competitiveness of Belfast and its export sector in the movement of freight. The City is well connected with the rest of the world with two airports, the second largest port on the island of Ireland and direct road and rail links to the capital of Ireland and proposed transport hub and rapid transport systems that will underpin the City Centre's function for investment and development.
- 3.15 The Harbour is a major economic enabler supporting 31% of NI's GDP and 27% of its employment within 700 companies and trade is expected to grow by 68% by 2030 and the Commissioner's plans indicate requirement for 82 additional acres of land to be reclaimed. Offices and a hotel are currently under construction on Harbour lands, the NI Science Park is expanding and the film industry is utilising buildings within harbour lands. The harbour lands are key locations handling liquid bulk products such as diesel, kerosene and chemicals, dry bulk sector commodities, including grain and animal feedstuffs, aggregate, coal, and scrap metal, break bulk products including steel, paper and timber. The Port also supports exports of manufactured goods, dairy, beef and poultry products supporting the agri-food sectors. The Port comprises logistics warehousing and container terminals with primary routes to the major European hub ports of Antwerp and Rotterdam. The Port is a freight and passenger route to Liverpool, Loch Ryan and Heysham handling over 500,000 freight vehicles, 275,000 cars and 1.2 million passengers annually and a Marina that has welcomed the Tall Ships.

- 3.16 Belfast Harbour Commissioners plans to invest £147m over the lifetime of its 20-30 year Corporate Plan 2012 to support 1600 jobs within major projects to facilitate a new cruise dock and the recently constructed Stena Line Terminal which will increase tourism and hospitality sectors [and land reclamation activities a deepwater quay, coal processing plant and renewable and biomass facility which will support additional employment during construction. The Offshore Wind Terminal has been constructed. It is the first of its kind in the UK and home to the world's largest developer of offshore wind, DONG Energy.
- 3.17 It is envisaged that Belfast will become a world leader in green technology through the recent approval of the £9.5m Giants Park an Environmental Resource Park of approx 65 acres promoting regeneration of former industrial wasteland and providing a sustainable development in the form of renewable energy technologies. This development has the potential to create 800 green collar jobs, provide training and construction opportunities and 1,000,000sqft of commercial floor space.
- 3.18 Belfast has made significant investment progressing towards becoming a digital city providing a high speed ultrafast network capacity and is one of only 21 Super Connected Cities in the UK which is an attractive incentive for businesses such as the creative industries which send large volumes of data. Better provision will create and support jobs, businesses, attracting major foreign investors as well as benefiting residents of Belfast. Companies such as 'Analytics Engines' specialise in 'Big Data Processing' and initiatives such as 'Smart Cities' can be used by creative industries and technological industries to promote of City in comparison to other competitors. This is in addition to Project Kelvin which provides direct telecommunications connectivity with North America via industry leading fibre optic submarine cables.
- 3.19 The City's aspirations of a 'learning city' is founded within Queens University Belfast (QUB), the University of Ulster (UU) and Belfast Metropolitan College (BMC) which have some of the leading courses and research institutes specialising in medical sciences, pharmacy, law, nursing, art and design, ICT and renewable technologies. The e3 campus within the Titanic Quarter has aided regeneration of the City waterfront area and the relocation of the £250m UU will further enhance the educational offer of the City to students, provide employment to lecturers and ancillary staff and generate complementary services. It is suggested that the Northside area has potential to generate 5000 jobs. It is estimated that higher education and students in Belfast generate £1.2bn in output, create 14,756 fulltime jobs and contribute to £700.3m to local GVA figures.
- 3.20 Belfast City Centre Regeneration and Investment Strategy (BCCRIS) recommends that the economic development of the University campus should be extended to include a proposed 'Creative Hub' with connections to an extended library and innovation uses within vacant buildings in proximity. QUB has developed over 60 spin-out companies to create over 1,500 jobs and the e3 BMC campus is dedicated to enterprise, employability and economic development. These education facilities have become leaders of health and medical research, cyber security research, food safety, advanced manufacturing and ICT. BMC has a creative media e3 hub and there are opportunities surrounding the new campus to expand the creative and digital media services that exist within the Cathedral Quarter.

- 3.21 Northern Ireland Science Park Innovation Centre located within the Titanic Quarter provides support for innovation-led, high-growth; knowledge based businesses and provides links with the Universities, Colleges and research centres and accesses to global data exchange. This centre has the opportunity for further expansion and growth. MatrixNI are the NI Science Industry Panel providing advice on the future policies necessary for NI to ensure economic growth and wealth creation through greater commercial exploitation of its science and technology capabilities.
- 3.22 Whilst there are eight local enterprise centres in the Belfast LGD providing workspace provision and business services such as social enterprises; start-ups must align to future growth sectors and jobs of the future. Belfast ranks poorly in terms of entrepreneurship, ranking last out of 64 cities. (Centre for Cities 2015). Belfast was the LGD with the 2nd lowest proportion of registered business per 10,000 population in 2014 (DETINI Inter Departmental Business Register). Belfast has potential to become a 'Creative Destination' by providing a pro- business environment through innovation centres and collaborative hubs where knowledge can be exchanged and exploited.
- 3.23 The devolution of Corporation Tax enabling Northern Ireland to set its own rates will encourage domestic business to invest and increase foreign direct investment by reducing the rate to 12.5% from 21% in line with the ROI rate and the Act which was given Assent in March 2015 and the power handed to the Executive in April 2018. Whilst it is estimated that the tax changes could create 2000 jobs in the local area, a sustained drive on skills levels would be required to ensure that Belfast has the appropriate skill sets in place to match the demand for jobs that a reduction in Corporation Tax would bring.
- 3.24 Belfast has become the second most attractive city in the UK outside London for foreign direct investment and has been named as one of the top 10 small and mid-sized cities in the world and the top small business friendly city in Europe 2016 for the second year. 60% of all FDI to NI is in Belfast. (DETI Analytical Services Unit Research Agenda 2015/16). Total inward investment from 2010-2011 to 2014-2015 totalled £981.79m within Belfast the majority originating from Great Britain and the United States.
- 3.25 Invest NI advise that almost 60% of enquires for office space were from FDI businesses. The Harbour Commission have completed construction of Grade A office accommodation at City Quays occupied by a global law firm and has further planning permission for a second Grade A office block adjacent to be completed mid 2016 to be occupied by an American technology company and also seek to develop commercial space at the Titanic Quarter and Sydenham Business Park. Grade A office accommodation was also completed at Weavers Court, Linfield Road and Forthriver Industrial Estate but there is still not choice of Grade A office accommodation comparable to the UK.

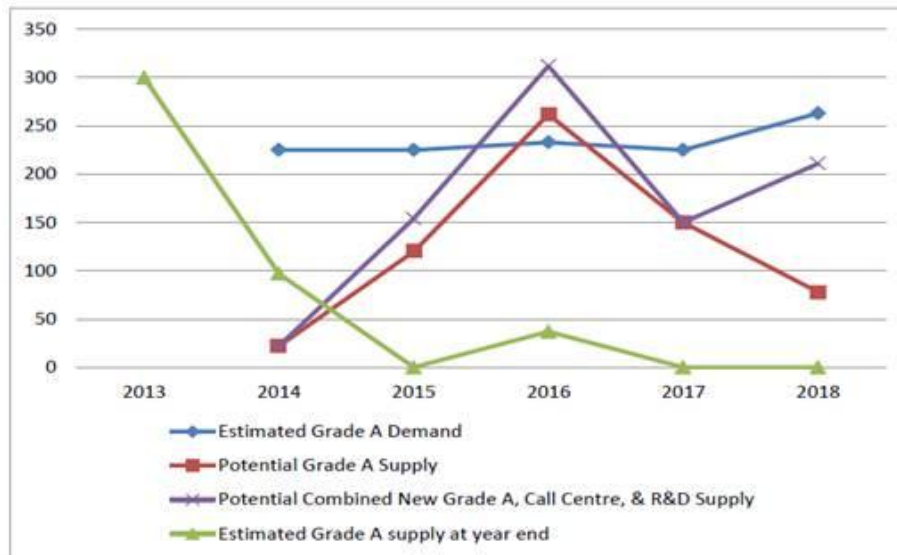
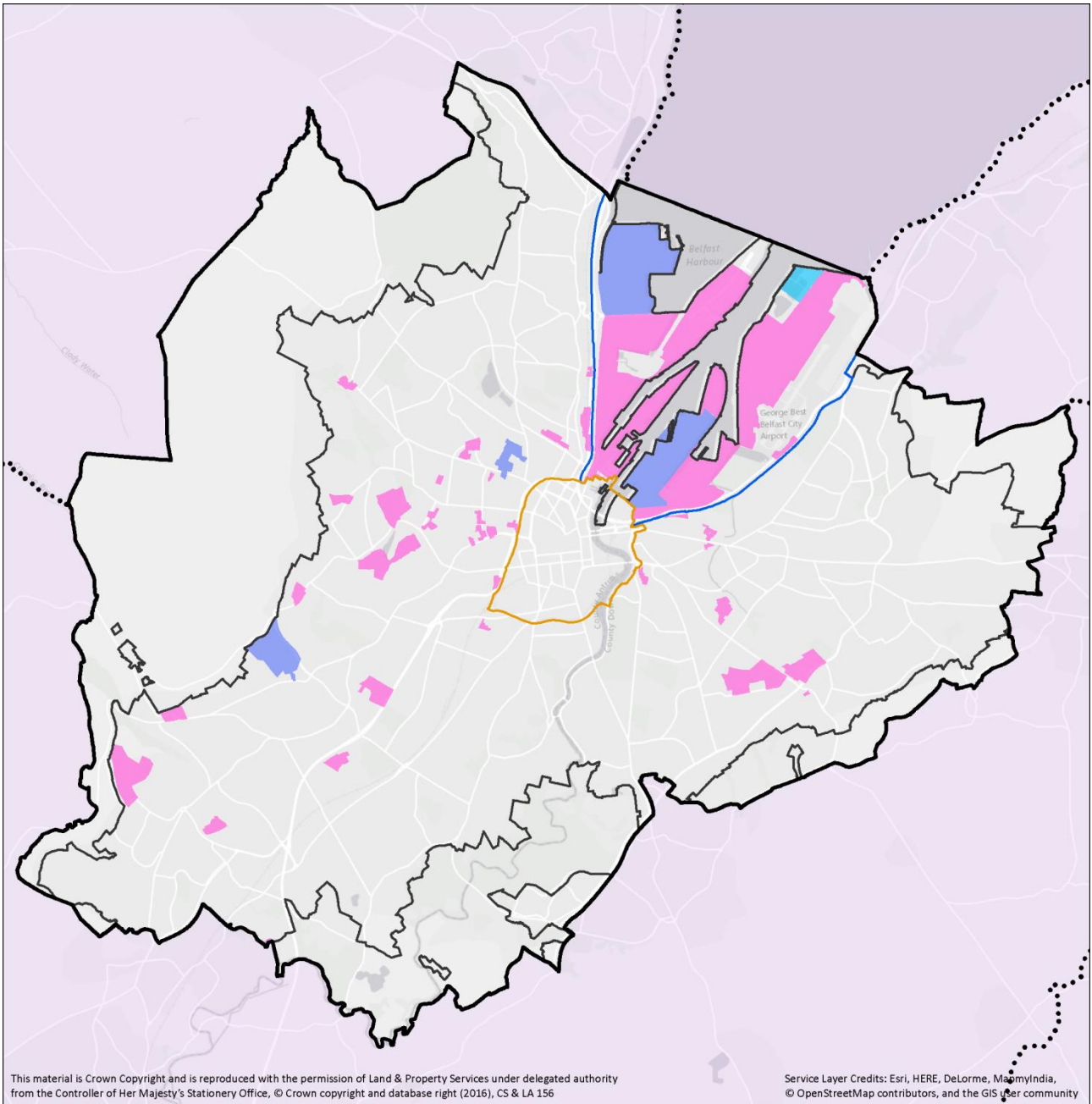


Figure 3: Belfast Grade A Office Supply and Demand Forecast (2014-2018)

- 3.26 By the end of 2014, the supply of Grade A office accommodation in Belfast city centre was estimated to be just under 100,000 sq ft. The estimated new supply of 120,000 sq ft to be provided during 2015, was predicted to be insufficient to meet the average annual demand of 225,000 sq ft. However, it is estimated that there is potential for 260,000 sq ft of Grade A space to be developed in 2016, which would be sufficient to meet the estimated average annual demand.
- 3.27 Invest NI advise that there were 29 industrial buildings in Belfast for sale or let in Q4 2013. The majority are between 10,000-20,000sqft with an under-supply of those of 10,000sqft or less and only one in excess of 50,000sqft. The bulk of accommodation is distribution/warehouse/storage in nature and due to the age of the stock would require extensive redevelopment. Speculative development is not commercially viable due to limited demand of industrial developments which is mainly indigenous. Invest NI advise that they have ownership of five sites as of March 2015 which have available land to be sold or leased to qualifying businesses situated at Springbank; Forthriver; Whiterock; Glenbank and Springvale in Belfast West and North totalling 12.99ha.



Existing Employment Designations

- Land zoned as Existing Employment
- Land zoned for Mixed Use
- Land zoned for Port Operations and Port-related Uses
- Council Area
- Metropolitan/Settlement Development Limit
- Belfast City Centre
- Belfast Harbour Area & Major Employment Location

Source: Belfast Metropolitan Area Plan 2015 (Adopted September 2014)



Figure 1: Belfast Local Government District Employment related Zonings (BMAP 2015)

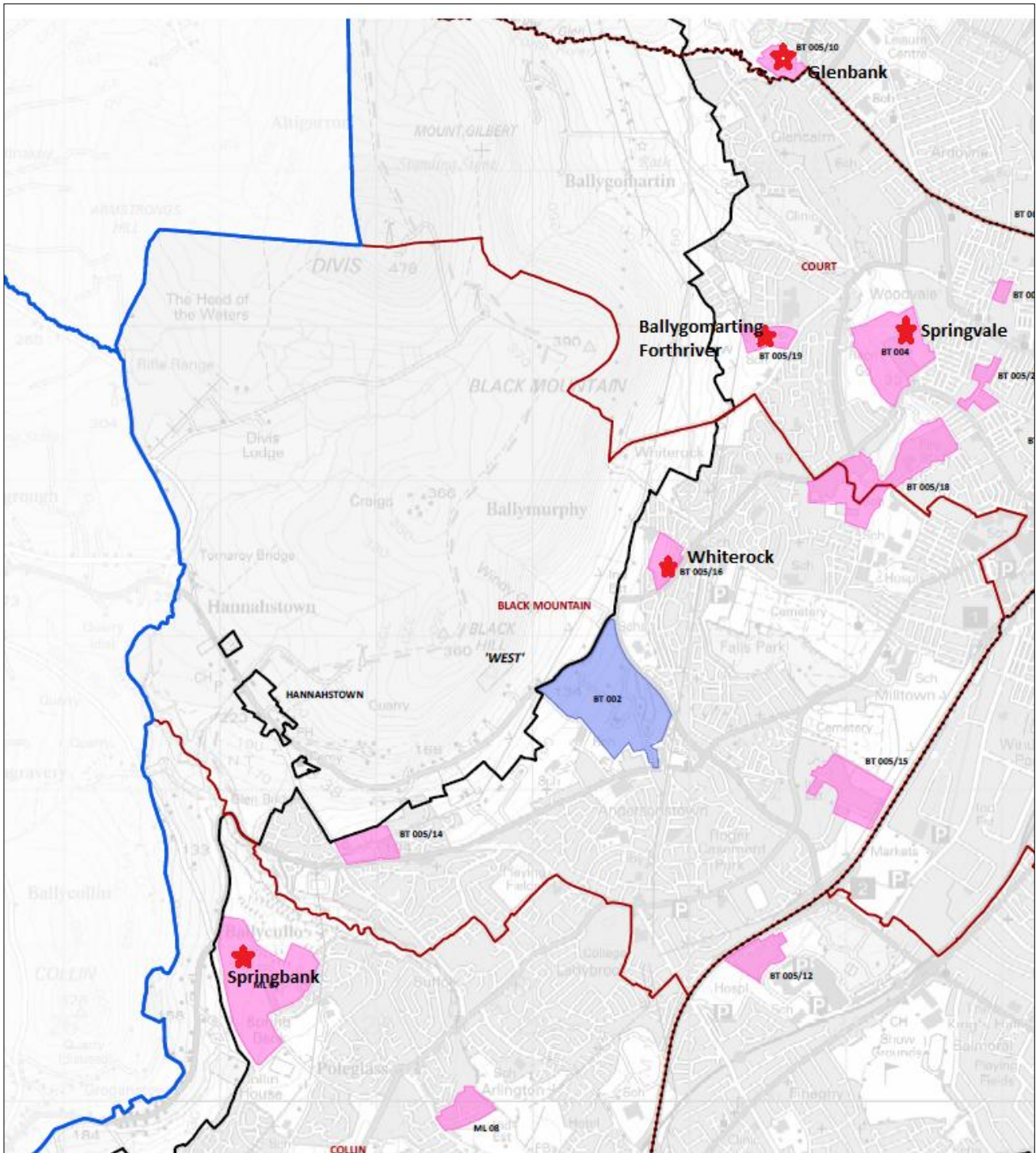


Figure 2: Invest NI landholdings on existing zonings

The Need for Future Employment Opportunities

3.28 As set out in PPS4 Planning and Economic Development, an estimate of the amount of land required to ensure a supply of suitable land to meet economic development needs is required. The amount of land needed over the plan period is influenced by a number of factors including the current economic climate, labour market, an assessment of the amount of land available and whether landowners are prepared to release their lands to a purchaser willing to invest in any key site requirements.

- 3.29 In determining how much economic development land is needed it is assumed that all new jobs will be in the secondary, tertiary and quaternary sectors given that 76% of all employment is in service based industries and the knowledge and skill economy is increasing. Belfast City Council alongside other independent and Government bodies have been involved in numerous frameworks and incentives to tackle economic inactivity and contribute towards a competitive employment rate and therefore it could be optimistically concluded that in the future economic activity rates will increase.
- 3.30 All new jobs may not be provided on zoned land, increases in employment can also occur in local district centres, other mixed use areas, in temporary capacities utilising vacant buildings, home working, and diversification or by increasing densities in existing buildings and industries.
- 3.31 Business sectors are diverse all requiring different types of premises and specific location requirements; higher value sectors will be able to pay higher rents in City Centre locations served by more modern accommodation whilst some may not be suited to a City Centre location but still provide employment and investment benefits for all city residents. The expansion of the Waterfront Hall to facilitate business conferences is such an example within the City Centre.
- 3.32 It's vital that the LDP provides sufficient employment land to be accommodated and aligned to the city's role as a sub-regional employment hub. Existing policy directs economic growth towards key strategic locations within the Harbour, Titanic Quarter, Port and Docks and North Foreshore in Belfast. However, accessibility of these areas is a barrier to employment which may be become through the introduction of the BRT and sustainable transport arrangements to link to those areas suffering unemployment and economic inactivity.
- 3.33 Given the importance of commuting the creation of new jobs in Belfast does not necessarily mean more jobs for Belfast residents as 52% of the city's workplace population commute from a different LGD. It should be noted however the proximity of Ards and North Down, Lisburn and Castlereagh and Antrim and Newtownabbey Council areas which will have their own zoned sites of employment and industry and key locations for economic growth which may provide employment to commuters from Belfast LGD.
- 3.34 However it is quite clear from the review the importance of commuting into the City for employment from other LGDs which currently accounts for 81,094 persons and therefore it would be very difficult to estimate the amount of land required to meet future need based on this approach.
- 3.35 Belfast LGD has many sites of varying sizes ranging from under 1ha to the vast lands within the Harbour, Titanic Quarter and North Foreshore. In total the existing local development plan BMAP zoned 1049.89ha of land within the Belfast LGD as of 2014 for employment related activities. Notable schemes have been granted approval since the plan was adopted in 2014 include the Forthriver Innovation Centre and the Giants Park Environmental Park at North Foreshore.

- 3.36 It is acknowledged that lands for housing, community and business uses have been granted approval on lands zoned for employment and industry on the site of the former Visteon factory which has been vacant for 6 years. The site is granted approval for 244 houses and 6,075sqm of floorspace for business uses which highlights the necessary for further review.
- 3.37 Invest NI advise that whilst demand from industrial occupiers is limited and ad hoc in nature it is greatest for units of less than 10,000sqft and in 2013 Belfast only had two of this scale on the market. Invest NI are in ownership of eleven sites of which five have 12.99ha of land zoned for existing employment use for sale or lease as of March 2015 to qualifying businesses located at Springbank Road Industrial site (ML07); Forthriver (Ballygomartin) Industrial Estate (BT004/19); Whiterock Industrial Estate (BT004/16); Glenbank Business Estate (BT004/10) and Springvale (BT004) lease which could all accommodate businesses units of up 10,000sqft.
- 3.38 Although the economic lands were evaluated prior to adoption of BMAP in 2014, following the introduction of the new plan system it is considered that this would be an appropriate time to review the existing situation before final zonings are identified. It is important that focus is provided to those areas of greatest economic and social need and strive to create shared space, especially within the most divided areas in order to reap the rewards that come with a more diverse, enriched environment.
- 3.39 However, it could be concluded from the review of the information received from Invest NI, Land and Property Services and information held in the Council in relation to the existing local plan BMAP, it is apparent that there is sufficient residual land zoned in the short to medium term.
- 3.41 There is necessity for further review of the residual lands on existing employment zonings to determine whether the land is sufficient to ensure a generous and continuous supply of land and an evaluation of the deliverability of these lands.

4.0 Issues and Approaches

Summary of Key Issues

It is clear that Belfast faces complex issues and opportunities including:

- High transportation costs and poor transportation network
- High rate of economic inactivity compared to NI
- Highest levels of employment and income deprivation in NI
- High rates of youth unemployment
- High levels of persons with no or low skills and qualifications
- 30% of the working age population have no or low qualifications
- Belfast has the lowest proportion of school leavers achieving at least five GCSEs at grade A*-C at equivalent when compared to other local government districts
- High rate of public sector employment compared to NI
- Lower incomes compared to UK average
- Low levels of innovation, entrepreneurship and business start-ups. Belfast ranks poorly in terms of entrepreneurship, ranking last out of 64 cities. (Centre for Cities 2015).
- Higher rates of business vacancy than UK average
- Belfast was the LGD with the 2nd lowest proportion of registered business per 10,000 population in 2014 (DETINI Inter Departmental Business Register).
- Over supply of secondary office accommodation
- Underused and derelict sites within key city centre locations
- Skills gaps to meet changing employment patterns
- Outward migration of skilled people
- Belfast has historically seen high levels of Foreign Direct Investment (FDI).
- Recent government incentives have sought to further grow the region's economy with an acknowledged focus on the Belfast City-region.
- Regional planning policy seeks to strengthen the role of Belfast Metropolitan Area as the regional economic driver and support Belfast as the major conurbation in NI with a thriving retail, service, administration, employment, cultural and educational.

Approaches

4.2 The following approaches should be given consideration in the context of the new LDP:

- Identify previously developed land within settlements for potential economic development use. This will serve to return vacant or underused land to productive use and to create more attractive environments.
- Identify an appropriate supply of economic sites and high quality business accommodation in locations served by good infrastructure and which cater for all sectors of the industry. and encourage high quality, well-designed, high spec environments to attract investment and address issues.
- Ensure the LDP facilitates economic development in locations accessible to disadvantaged urban areas.

- Ensure LDP provides sufficient employment land to reinforce city's role as a sub-regional employment hub.
- Ensure a full evaluation of the existing zonings to include an analysis of the vacant sites, premises under construction and sites with extant or expired planning permissions to enable identification of the residual plan allocations.
- Provide for mixed use development to support the construction of learning and innovation hubs such as the Forthriver Innovation Centre to support emerging industries like the creative, media, digital and lower carbon technologies and through utilising redundant and vacant buildings such as the Crumlin Road Gaol and former industrial buildings of Queens Island.
- Additional policy to ensure there is potential to contribute to growing the economy arising from the supply chain of goods and services, spin outs, outreach programmes, construction and an increased student population who may live within the City Centre and opportunities arising from increasing graduate population.
- Consideration of alternative compatible uses on employment sites.

4.3 This information contained within this topic paper has been used to inform the next stage of the LDP process, the Preferred Options Paper.

4.4 The information contained within this topic paper has been used to inform the next stage of the LDP process, the Preferred Options Paper.

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Appendix A: The Employment Land Evaluation Framework (RDS 2035)

<p>Stage 1 Taking stock of the existing situation</p>	<p>An initial assessment of the ‘fitness for purpose’ including the environmental implications of existing employment land portfolio. This is principally in order to identify the ‘best’ employment sites to be retained and protected and identifying sites that should be clearly be released for other uses.</p>
<p>Stage 2 Understanding Future Requirements</p>	<p>Quantify the amount of employment land required across the main business sectors during the development plan period. This is achieved by assessing how they can be met in aggregate by the existing stock of business premises and by allocated sites. Account should also be taken of turnover of existing sites due to relocation or closures. Both short/medium term and strategic provision need to be considered in this process.</p>
<p>Stage 3 Identifying a New portfolio of sites</p>	<p>Devise qualitative site appraisal criteria to determine which sites meet the occupier or developer needs. Confirm the existing sites to be retained, replaced or released, and any gaps in the portfolio. In this allocation, consideration should be given to previously used sites, and in the reallocation, the environmental impact of one site relative to others should be included. The results of Stage 2, together with this site appraisal should provide a robust justification for altering allocations for employment land.</p>

Appendix B - Uptake of employment related zonings in Belfast District Council Area 2015 (hectares)

Land zoned as Existing Employment

Plan Ref	Location	Total Area (Draft)	Remaining 2014(adoption)	Developed (over course of draft period)
BHA 06	Belfast Harbour		547.96	
BT004	Land at Springfield Road (Mackie's)	19	18.82	0.18
BT005/01	Newtownards Rd/Tamar St	3.124	2.82	0.3
BT005/02	Island St/Ballymacarrett Rd	1.335	1.34	0
BT005/03	East Belfast Enterprise Pk	0.825	0.81	0.01
BT005/04	Castlereagh Rd	6.936	6.63	0.3
BT005/05	Hillview Rd	5.767	5.75	0.01
BT005/06	Cambrai St	1.542	1.19	0.3
BT005/07	York Rd/Jennymount Business Pk	7.665	7.6	0.06
BT005/08	Duncairn Gardens	4.695	4.52	0.17
BT005/09	Shore Rd/Skegoneill St	1.254	1.2	0.05
BT005/10	Glenbank Business Park	4.263	3.74	0.52
BT005/11	Donegall Rd	1.456	1.47	0
BT005/12	Stockmans Way	6.494	6.19	0.3
BT005/13	Ravenhill Business Pk	2.306	2.2	0.1
BT005/14	Glen Rd	4.11	6.91	2.8
BT005/15	Kennedy Way	15.45	13.00	2.45
BT005/16	Whiterock Industrial Estate, Springfield Rd	4.99	4.81	0.18
BT005/17	Westlink Enterprise Centre, Distillery St	2.102	1.76	0.34
BT005/18	Springfield Rd	23.74	23.58	0.16
BT005/19	Ballygomartin Industrial Estate	4.457	4.41	0.04
BT005/20	Lanark Way	4.626	3.57	1.056
BT005/21	Argyle Business Pk, Shankhill Rd	2.118	2.0	0.118
BT005/22	Agnes St Industrial Estate	0.737	0.74	0

BT005/23	Louden St/Townsend St	1.699	1.63	0.06
BT005/24	Andrews Mill, Divis St	2.335	2.33	0
BT005/25	North Howard Link	2.636	2.18	0.456
BT005/26	Conway St	1.807	0.97	0.83
MCH09	Prince Regent Rd	18.247	17.09	1.157
MCH 10	Castlereagh Industrial Rd, Montgomery Rd	32.712	29.14	8.572
MCH11	Ballygowan Rd	0.5	0.49	0
ML05 (Part of)	Seymour Hill Industrial Estate		0.93 of 10.8	
ML07	Springbank Industrial Estate	29.535	31.55	
ML08	Kilwee Industrial Estate, Dunmurry	5.766	5.7	0.06

Land Zoned for Mixed Use

BHA01	Titanic Qter	38.93?? 87.31??	89.83	
BHA05	North Foreshore	47.364??79.84??OS BHA19	127.25	
BT002	Land at Monagh Bypass/Upper Springfield Rd	31.75 ?? (Draft)	36.08	
BT003	Land at Crumlin Rd inc Girdwood	12.806	12.53	

Land Zoned for Port Operations

BHA04	D3, Airport Rd W	19.11	19.11	
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Details of Invest NI landholding and available land 31st March 2015

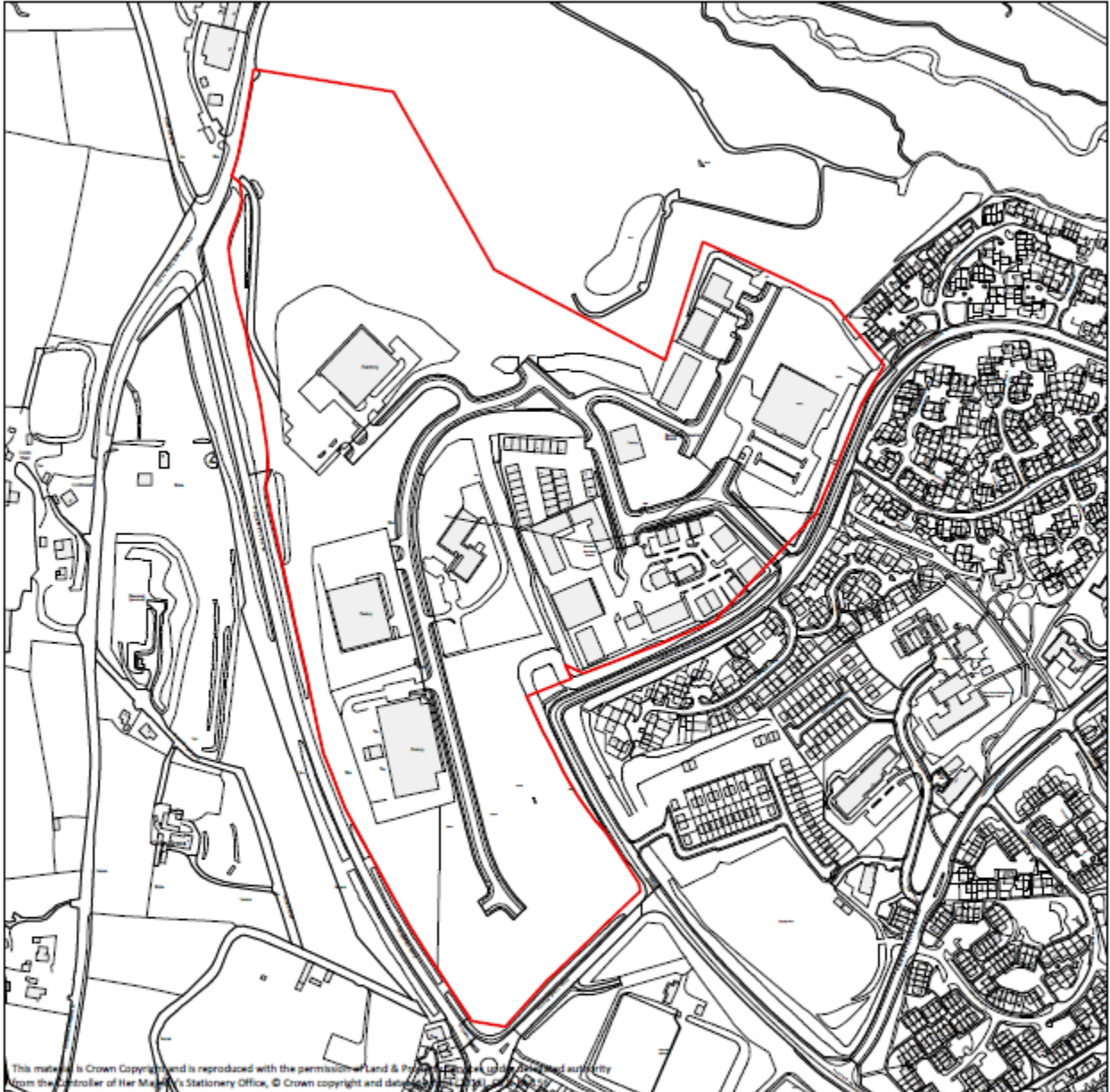
Industrial Estate	Consituency	Ward	Landholding (ha)	Available Land (ha)
Springbank	Belfast West	Collin Glen	30.83	5.34
Forthriver	Belfast West	Highfield	9.34	4.33
Whiterock	Belfast West	Upper Springfield	4.91	1.34
Glenbank	Belfast North	Legoniel	4.48	1.17
Springvale	Belfast West	Beechmount	19.39	0.85
Northgate	Belfast North	Duncairn	2.18	0.00
Broadway	Belfast South	Blackstaff	1.46	0.00
Adelaide	Belfast South	Blackstaff	1.34	0.00
Glen Road	Belfast West	Glencolin	6.86	0.00
Ballygomartin	Belfast West	Highfield	4.37	0.00
Kennedy Way	Belfast West	Falls Park	1.17	0.00

Appendix –C Invest NI Landholding with available lands



**Belfast
City Council**

**Employment and
Economic Development**



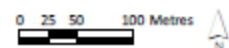
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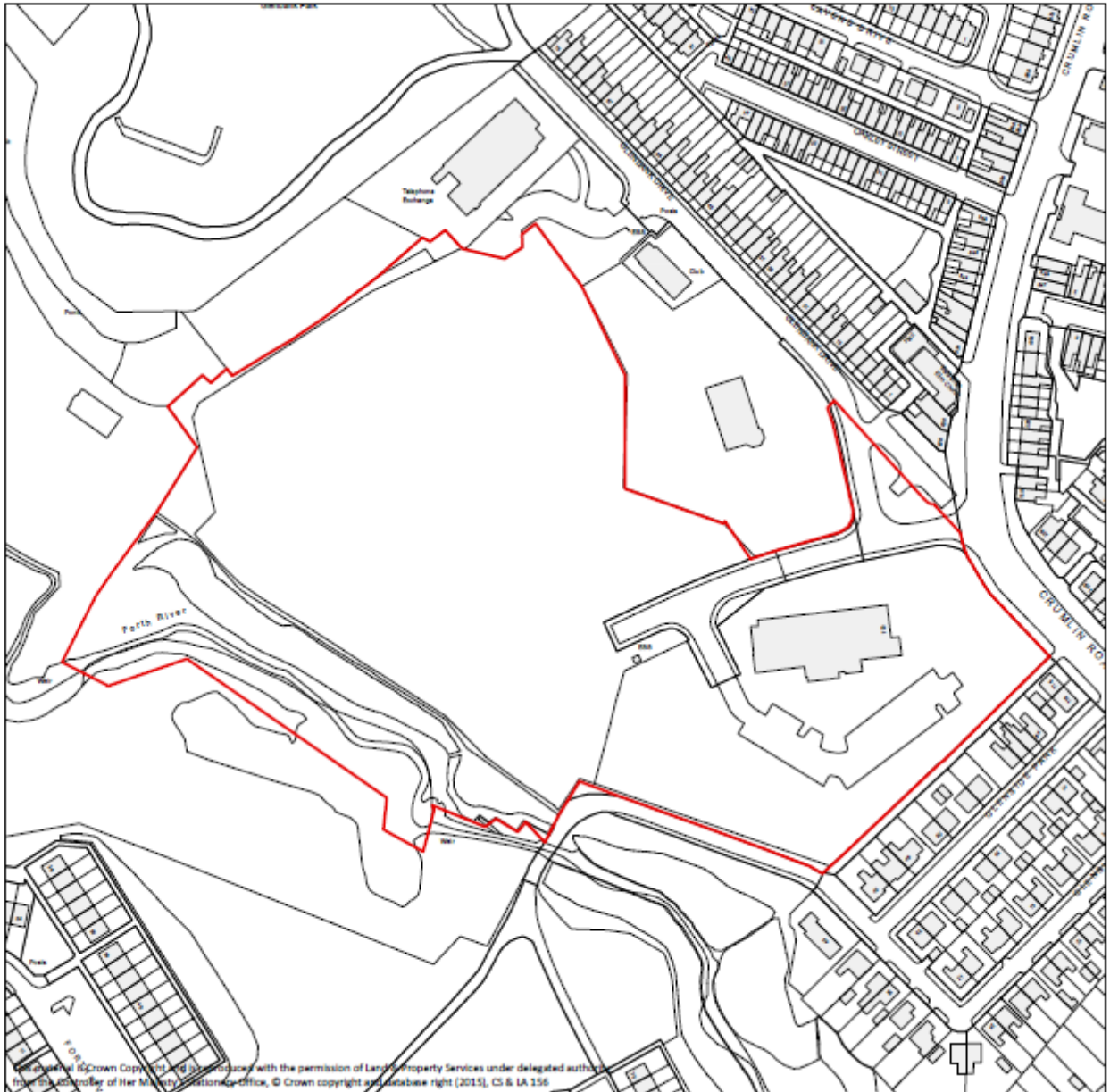
Invest NI landholdings in Belfast City as of 31st March 2015

SPRINGBANK

 Invest NI Landholding (30.83ha of which 5.34ha available)

Source: Invest NI






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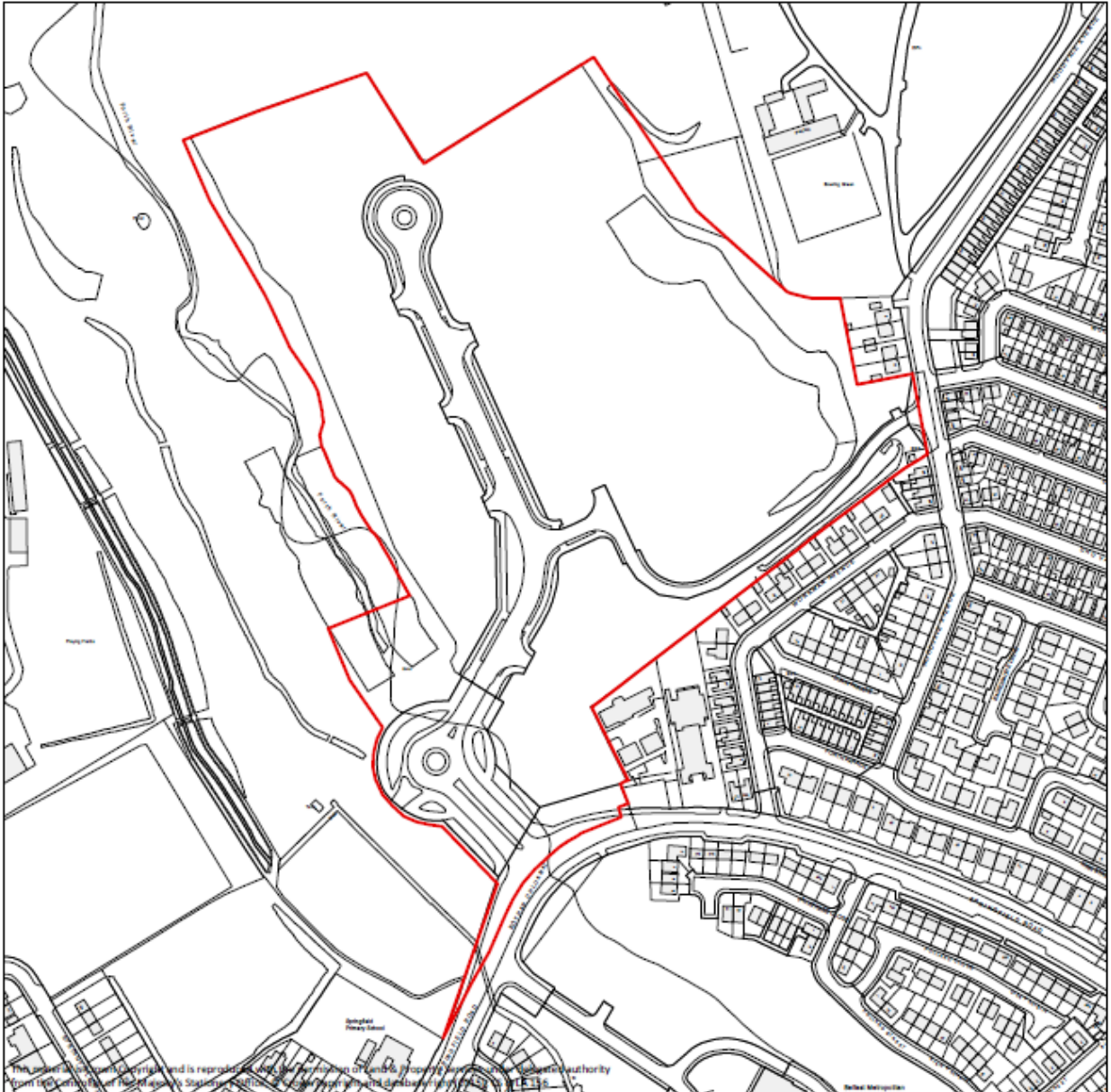
Invest NI landholdings in Belfast City as of 31st March 2015

GLENBANK

 Invest NI Landholding (4.48ha of which 1.17ha available)

Source: Invest NI



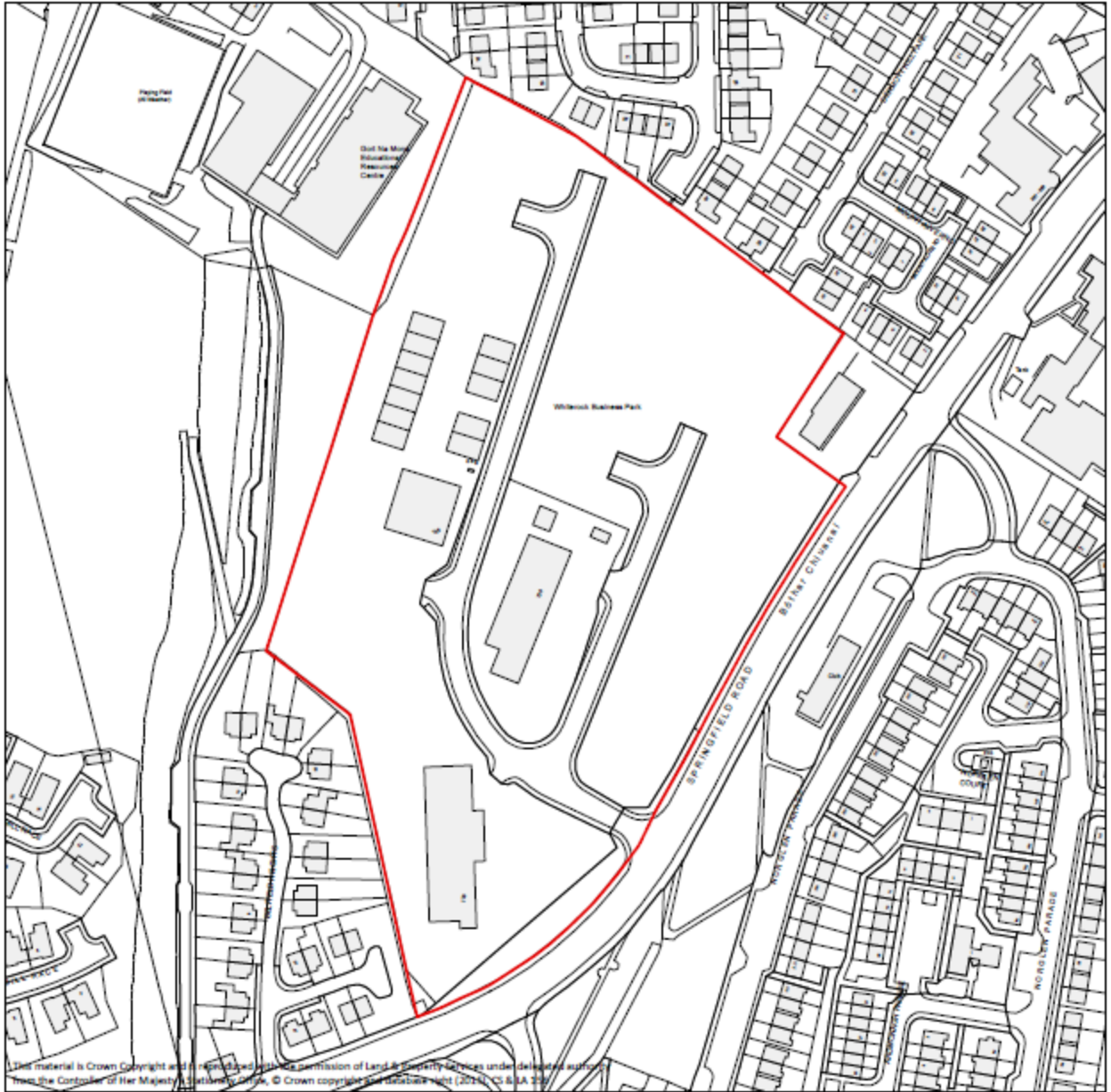


Invest NI landholdings in Belfast City as of 31st March 2015
FORTH RIVER

 Invest NI Landholding (9.34ha of which 4.33ha available)


Source: Invest NI





Invest NI landholdings in Belfast City as of 31st March 2015

WHITEROCK

 Invest NI Landholding (4.91ha of which 1.34ha available)


Source: Invest NI





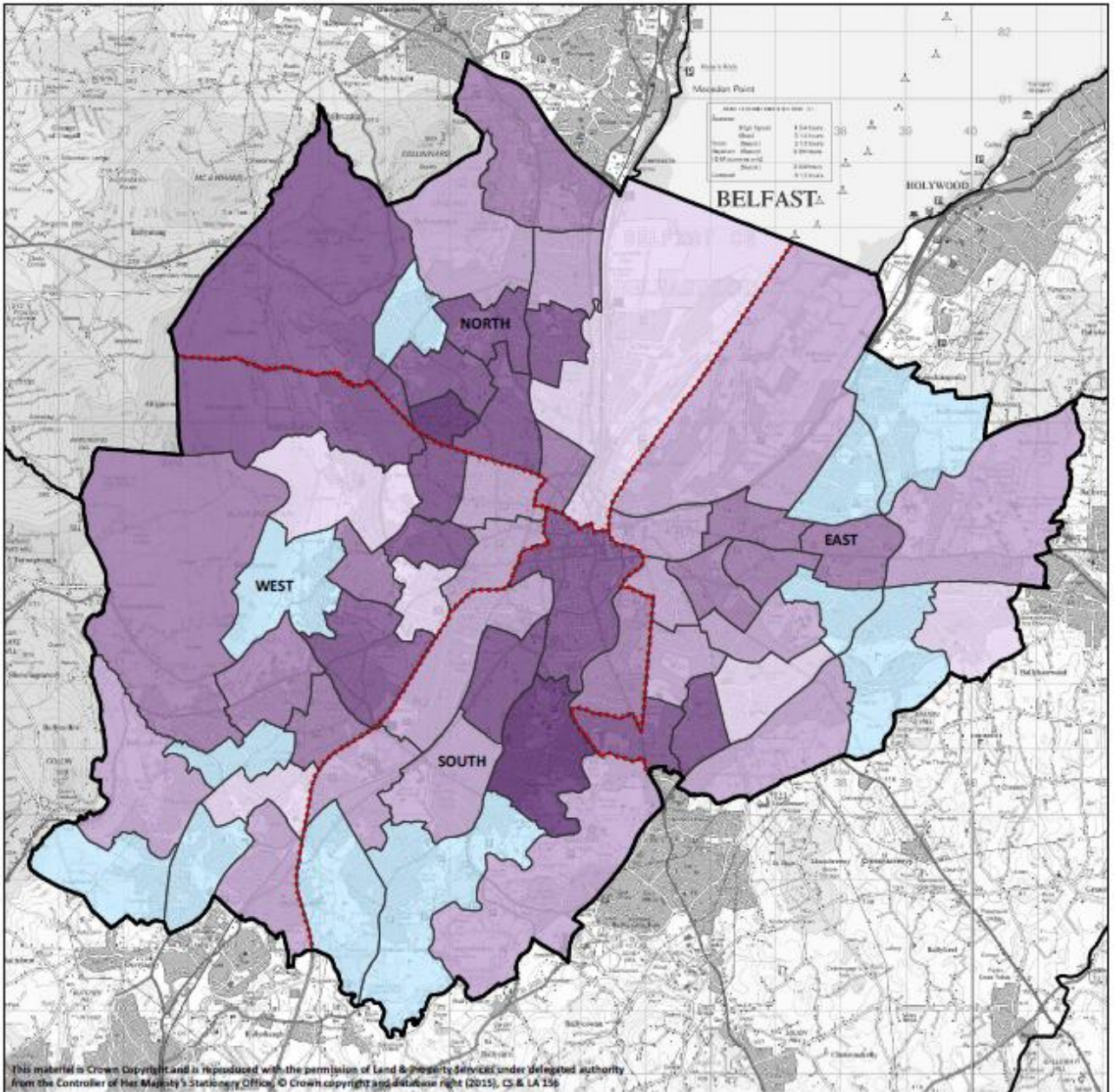
Invest NI landholdings in Belfast City as of 31st March 2015

SPRINGVALE

 Invest NI Landholding (19.39ha of which 0.85ha available)

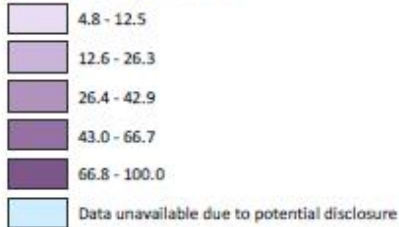
Source: Invest NI





Vacancy rates in Industrial property by ward in Belfast, 30/09/15

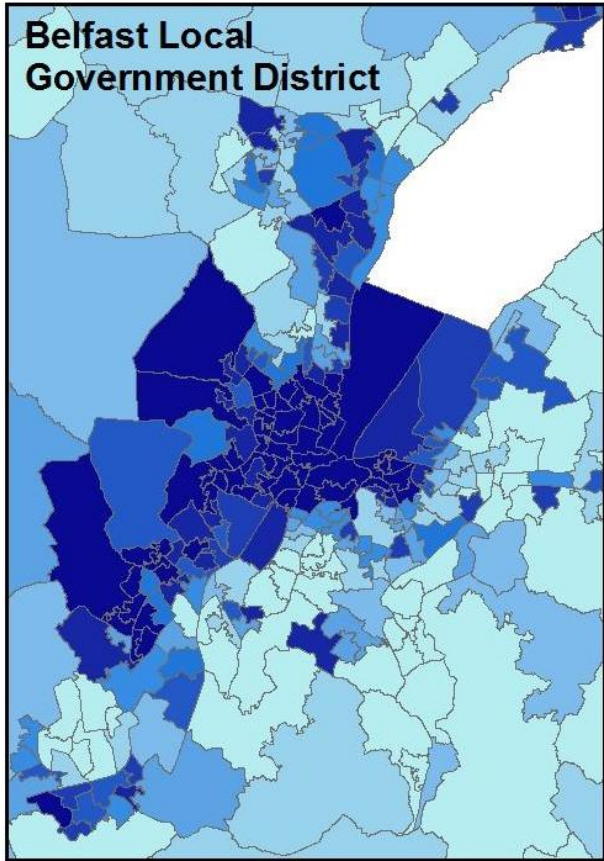
% of Industrial properties vacant



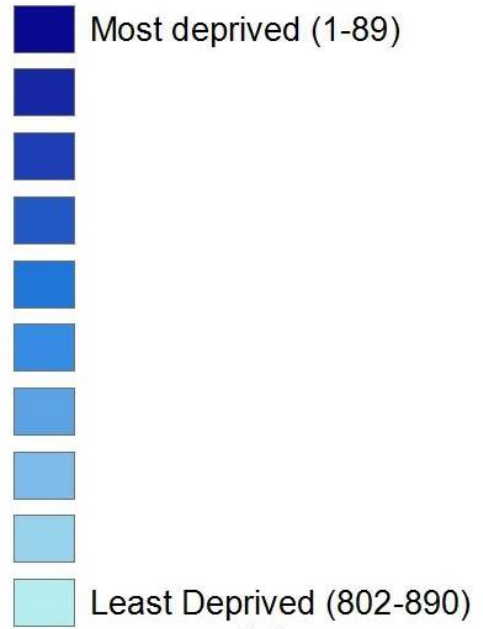
— Council boundary
 Area Working Group boundary

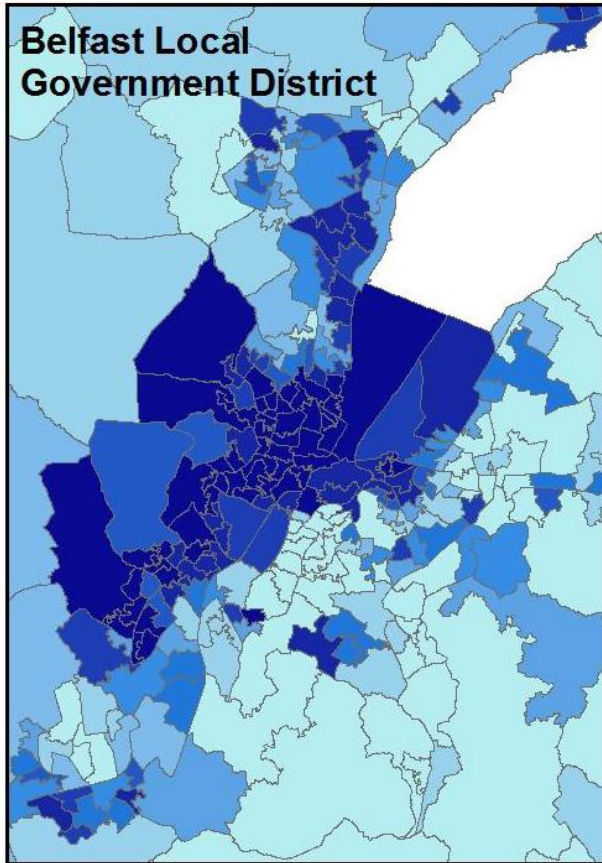
Source: LPS Property Rating Data



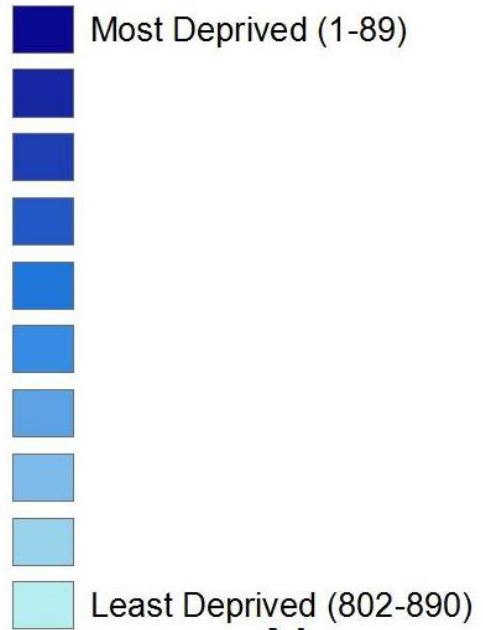


NI Multiple Deprivation Measure Rank (Super Output Area Deciles)





Employment Deprivation Domain Rank (Super Output Area Deciles)



September 2016

Belfast City Council

Assessing Employment Space Requirements across the City – 2015-2030



Andrew Webb and Jordan Buchanan

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Overview

UUEPC ('the centre') have developed a Local Economic Forecasting model as part of the Local Government sponsorship package, to which Belfast City Council ('the Council') contribute. The Centre produces bi-annual forecasts for each of the eleven Council areas in NI. The forecasts cascade from the Cambridge Business Research team and the Centre's national and NI forecasting models. Details on how that model operates are presented in Appendix 1. The Local Economic Forecasting model includes baseline, Corporation Tax and "upper" scenarios. The upper scenario was developed in order to illustrate the type of economy NI might aspire to. A post-Brexit scenario will be developed during Autumn 2016.

The Council are currently developing a range of ambitious strategies that, if successfully implemented, will achieve the overarching ambition of a 'successful place where people love to live, work and visit and which attracts investment and talent'. Of particular relevance to this research, the Council's emerging Local Development Plan includes a commitment to 'maintain a strong and growing economy through ensuring a range of suitable sites for employment uses are available and able to be developed to meet the future demand for jobs.'

In order to consider how employment space demands might change over the period to 2030, UUEPC have developed an economic modelling system which converts Belfast's employment forecasts into employment space requirements using Employment density guidance published by the Homes and Communities Agency¹.

Caveats

This paper provides a framework for considering how demand for employment space is likely to be affected by forecast employment growth in Belfast. However, there are a number of caveats to be aware of in the use of the outputs provided in this paper.

- 1) The analysis does not account for changing work patterns or changing trends in employment densities over time. It may be the case that increases in home working or changes to best practice in office design over time change employment densities. It was not feasible within the remit of this research to take a view on how this issue will impact over time and so current employment density guidance is applied consistently throughout.
- 2) It was beyond the scope of this research to consider current or future supply of employment space in Belfast and whether there is a mismatch. Further detailed research would be required to audit current provision. However, a range of sensitivity analyses are applied to the results to indicate the impact of different levels of current capacity and vacancy rates.

¹ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/484133/employment_density_guide_3rd_edition.pdf

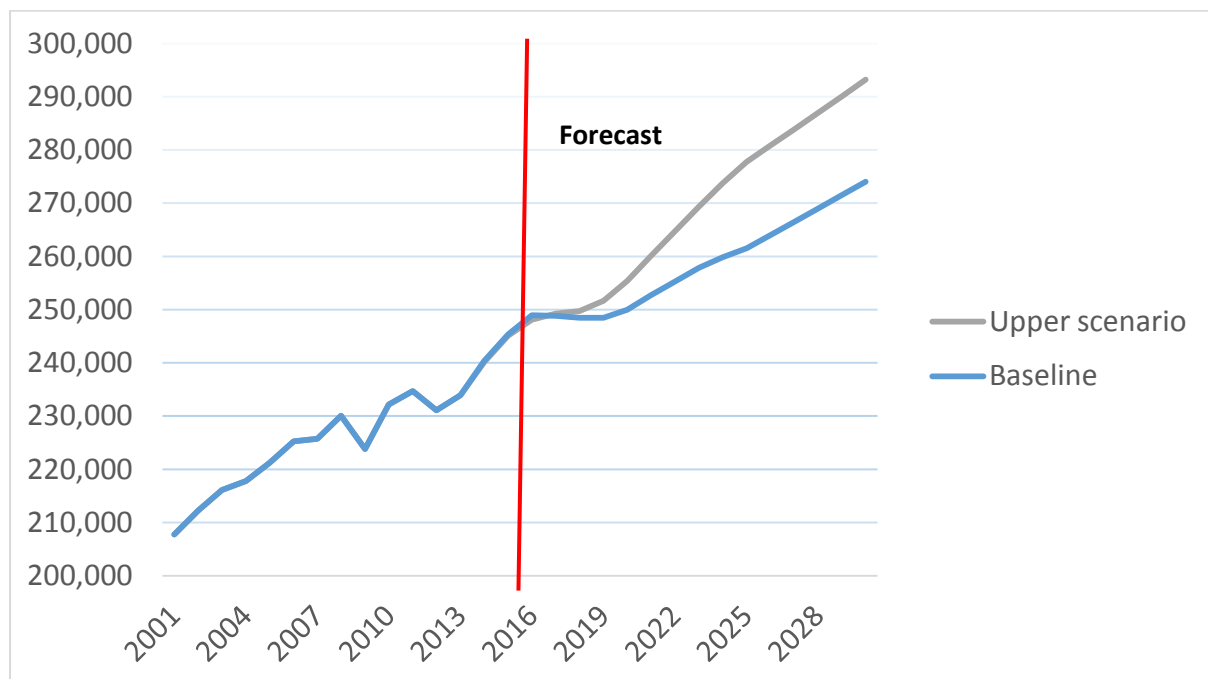
Labour Market Context

This element of the report presents the UUEPC baseline forecasts and 'upper scenario' for employment numbers in Belfast. The upper scenario is framed as follows:

- The upper scenario includes the impact of a corporate tax reduction to 12.5% in 2018
- The NI employment rate would rise closer to the current UK employment rate (average over 3 years, assumed to increase from 68% to 71.5%);
- The biggest growth is applied to the higher value added and export potential areas of the economy (ICT, Professional Services and Manufacturing);
- Lower but appropriate levels of growth applied to the wider supporting sectors such as Retail, Hospitality, Construction and Transport; and
- Increased private sector growth should also increase the tax base and therefore the reduction in spending on public sector services would not be as significant.

There are currently 245,000 people employed in Belfast. This is c.38,000 more than in 2001 and, with the exception of two years (2009 and 2012) when 10,000 jobs were lost in the city, figures have been on consistent upward trend. In fact, since the decline in 2012, Belfast has gained over 14,000 more jobs.

Figure 1: Total Employment in Belfast 2001-2030



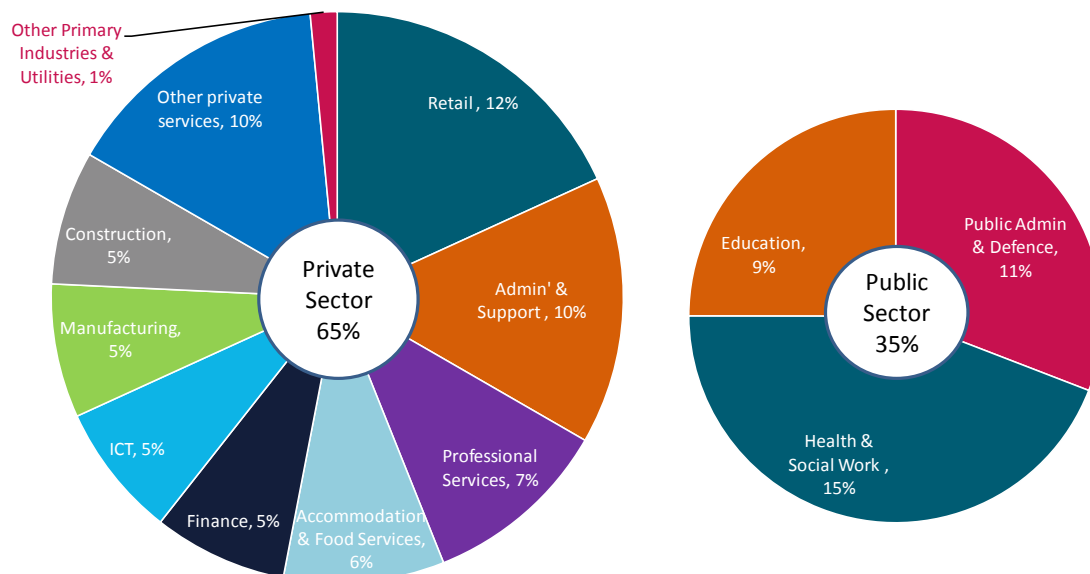
Source: NISRA, UUEPC

The expected path for future employment growth broadly positive. The baseline scenario, UUEPC's estimation of the most likely economic outcomes for the Northern Ireland economy and Belfast over the period to 2030 would result in a period of slight employment declines until 2019 followed by a return to growth from 2020 onwards. Between 2016 and 2030, UUEPC's forecast's suggest that Belfast's employment will be 25,000 higher than current levels. The upper scenario, as defined above, would result in considerably stronger job creation, adding a further 20,000 above the baseline scenario and resulting in total employment of c.293,000.

Labour market: sectoral analysis

The sectoral mix in Belfast is heavily weighted towards the private sector and office/retail type employment. Private sector jobs account for two thirds of total employment, with one third in the public sector. Across all sectors, Health and social work is the largest, accounting for 15% of all Belfast employment. As Belfast is host to three significant hospitals, this concentration of employment is unsurprising. Belfast's other key sectors include the 'city friendly' type sectors such as retail (12%), Administrative and support (10%), other private services (10%) and professional services (7%).

Figure 2: Employment across sectors in Belfast, 2015

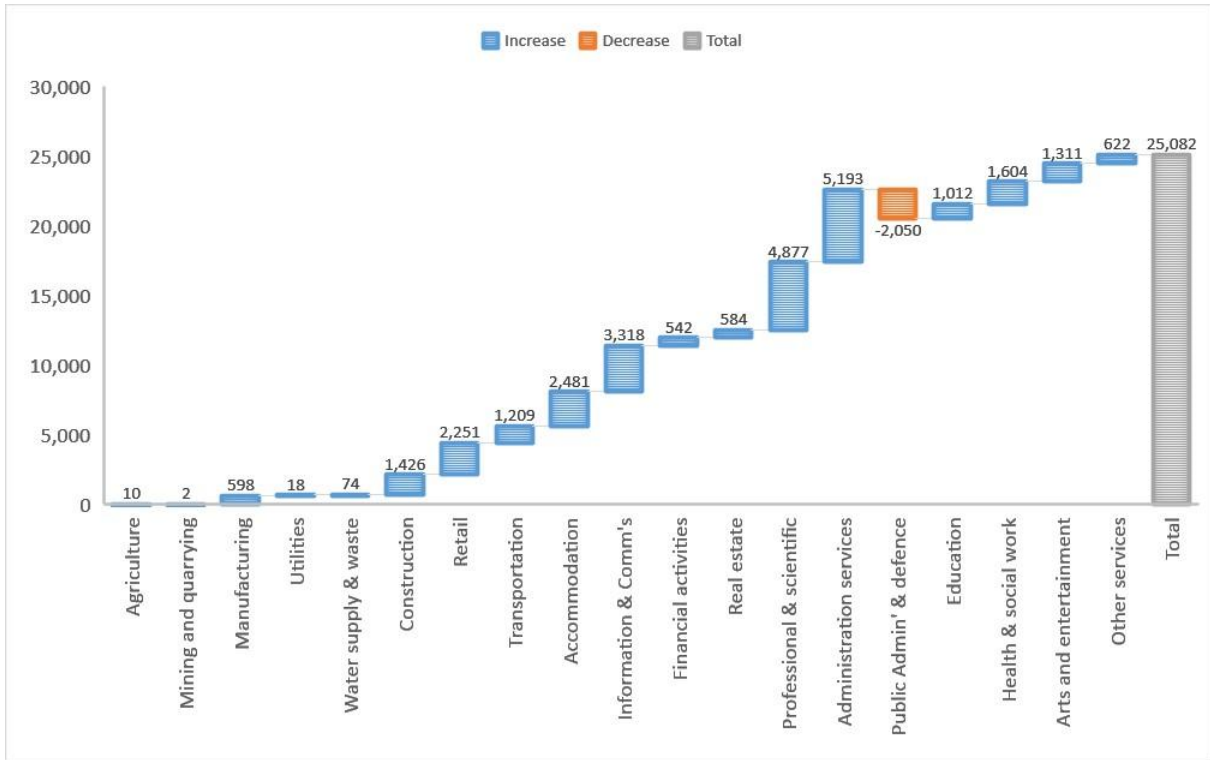


Source: Department for the Economy and UUEPC

The contribution to Belfast's growth from each sector is presented in figure 3 and figure 4. In the baseline scenario, administration services contribute more jobs to 2016-2030 growth than any other, adding just over 5,000 jobs. Professional and Scientific and Information and Communication complete the three, adding 4,877 and 3,318 jobs respectively.

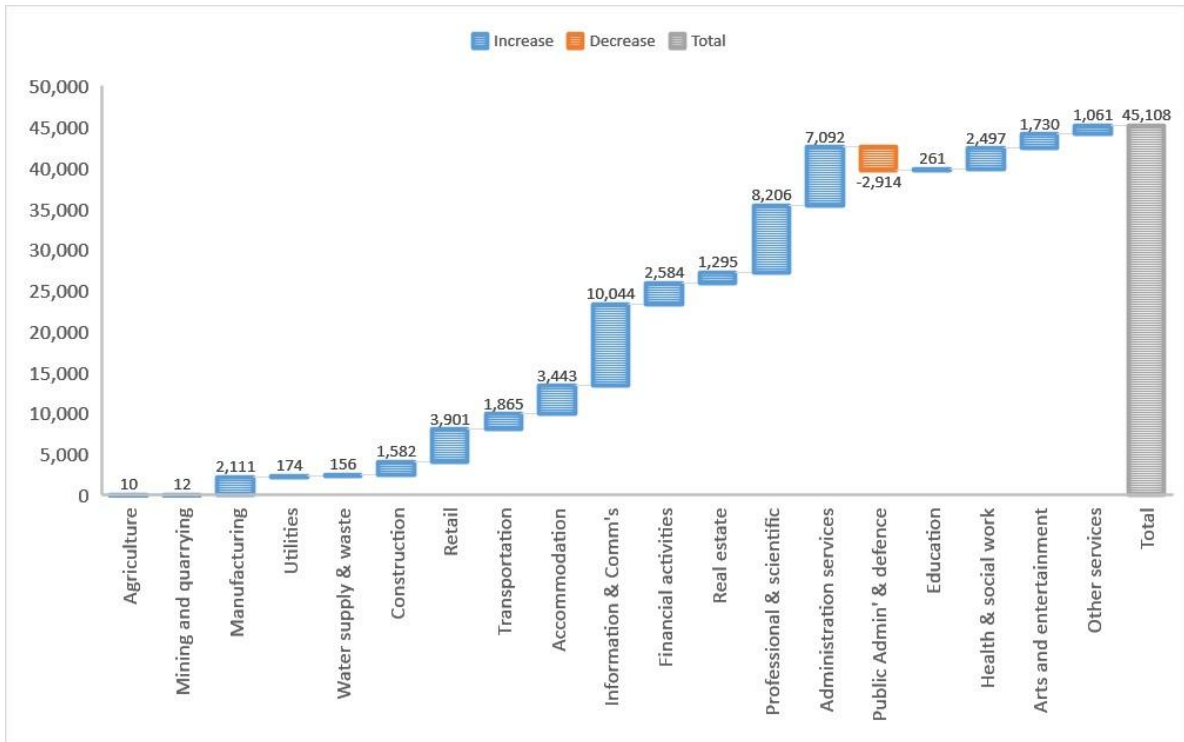
The nature of the upper scenario, including a reduced corporation tax rate is reflected in a slight shift in sectoral drivers of growth. In this scenario information and communication is the sector that contributes the most jobs to the 2016-2030 growth – over 10,000 jobs, a quarter of the total. Professional and Scientific and Administration services make up the rest of the top three, adding 8,206 and 7,092 jobs respectively.

Figure 3: Employment change 2016-2030 (Baseline Scenario)



Source: UUEPC

Figure 4: Employment change 2016-2030 (Upper Scenario)



Source: UUEPC

The following section assesses how these employment growth statistics impact on employment space demand.

Employment Space Demand

The approach UUEPC have taken to converting employment by sector into square metre requirements is:

- The Employment Density Guidance from the Home and Communities Agency provides a range of SQ M guides by business use class and sub sector (table 1). UUEPC have applied a mid-point for each use class.
- UUEPC calculated a matrix of use class by sector. For example, the manufacturing sector is classified as 30% R&D space, 50% light industrial and 20% 'industrial and manufacturing' space. The use class by sector matrix is presented in appendix 2
- For each sector, employment from 2016 to 2030 is applied to the use class by sector matrix to calculate sq m demand by year.

Table 1: Employment Densities

Use class	Sub category	Sub sector	Density (Sq metres)
A1	Retail	High Street	15-20
		Foodstore	15-20
		Retail Warehouse	90
A2	Finance and professional services		16
A3	Restaurants & Cafes		15-20
B1A	General Offices	Corporate	13
		Prof services	12
		Public sector	12
		TMT (Tech, media & telecoms)	11
		Finance and insurance	10
		Call centres	8
B1B	R&D Space		40-60
B1C	Light Industrial		47
B2	Industrial and manufacturing		36
B8	Storage and distribution	National distribution centre	95
		Regional distribution centre	77
		Final mile distribution centre	70
B Mixed Class	Small Business Workspace	Incubator	30-60
		Maker spaces	15-40
		Studio	20-40
		Co-working	10-15
		Managed workspace	12-47
B8/SUI Generis	Data centres	Wholesale	200-950
		Wholesale dark site	440-1400
		Co-location facility	180-540
C1	Hotels	Limited service/budget	1 per 5 beds
		Mid-scale	1 per 3 beds
		Upscale	1 per 2 beds
		Luxury	1 per 1 bed
D2	Fitness centres	Budget	100
		Mid Market	65
		Family	65
	Cinema		200
	Visitor and cultural attractions		30-300
Amusement and entertainment centres		70	

Source: Home and Communities Agency

The results of the employment space demand are presented below. In the base scenario, UUEPC estimates suggest that Belfast will require a total of 675,000 sqm by 2030. In the upper scenario, over 1.1m sqm is forecast to be required. To place this in context, on the first 6 months of 2016, CBRE report that 21,375 sqm of office space has been taken up in Belfast. Focussing on the upper scenario, the largest requirement will be in use class B1A, General offices. This class will require an estimated one third of the total requirement. Small business space, hotels and Storage/distribution are also estimated to require over 100,000 sqm each.

Table 2: Demand for employment space, 2016-2030

Use Class	Sub Category	Base Scenario Sqm	Average Sqm per annum	Upper Scenario Sqm	Average Sqm per annum
A1	Retail	39,000	3,000	68,000	5,000
A2	Finance & Professional Services	20,000	1,000	50,000	4,000
A3	Restaurants & Cafes	15,000	1,000	23,000	2,000
B1A	General Offices	209,000	15,000	376,000	27,000
B1B	R&D Space	27,000	2,000	60,000	4,000
B1C	Light Industrial	25,000	2,000	66,000	5,000
B2	Industrial & Manufacturing	5,000	-	19,000	1,000
B8	Storage & Distribution	76,000	5,000	116,000	8,000
B Mixed Class	Small Business Workspace	106,000	8,000	187,000	13,000
C1	Hotels	124,000	9,000	172,000	12,000
D2	Fitness Centres/Leisure/Cultural	30,000	2,000	44,000	3,000
	Total	675,000	48,000	1,180,000	84,000

Source: UUEPC

Sensitivity Analysis

Of course, not all future demand will require new buildings. Many businesses will expand within their current footprint and vacant property will also be absorbed, if fit for purpose. It was beyond the scope of this research to audit current provision of the extent to which employment growth in Belfast can be absorbed by current provision. Rather, sensitivity analysis has been applied to the numbers above on the basis that a) 10% and b) 20% of employment growth can be absorbed by current provision. These assumptions can be revised should data become available.

The results of the sensitivity analysis are presented overleaf. In summary, the range of employment space demand ranges from 540,000 sqm for the base scenario with the assumption that 20% of demand is met from current provision to 1,180,000 sqm in the upper scenario with assumption on current capacity.

Table 3: Demand for Employment Space, 2016-2030, sensitivity analysis

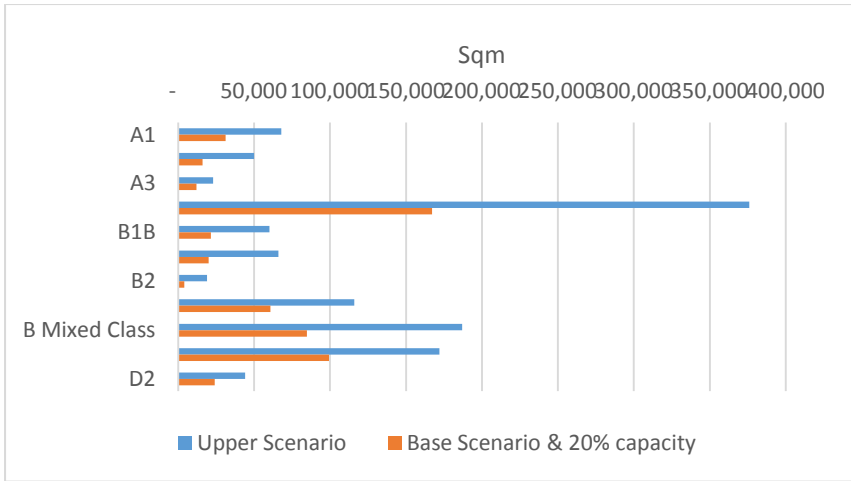
		No Sensitivity Applied		Capacity of 10%		Capacity of 20%	
		Base Scenario	Upper Scenario	Base Scenario	Upper Scenario	Base Scenario	Upper Scenario
A1	Retail	39,000	68,000	35,100	61,200	31,200	54,400
A2	Finance & Professional Services	20,000	50,000	18,000	45,000	16,000	40,000
A3	Restaurants & Cafes	15,000	23,000	13,500	20,700	12,000	18,400
B1A	General Offices	209,000	376,000	188,100	338,400	167,200	300,800
B1B	R&D Space	27,000	60,000	24,300	54,000	21,600	48,000
B1C	Light Industrial	25,000	66,000	22,500	59,400	20,000	52,800
B2	Industrial & Manufacturing	5,000	19,000	4,500	17,100	4,000	15,200
B8	Storage & Distribution	76,000	116,000	68,400	104,400	60,800	92,800
B Mixed Class	Small Business Workspace	106,000	187,000	95,400	168,300	84,800	149,600
C1	Hotels	124,000	172,000	111,600	154,800	99,200	137,600
D2	Fitness Centres/Leisure /Cultural	30,000	44,000	27,000	39,600	24,000	35,200
	Total	675,000	1,180,000	607,500	1,062,000	540,000	944,000

Source: UUEPC

Conclusion

Belfast's employment forecasts suggest growth of between 25,000 and 45,000 between 2016 and 2030 across the base and upper scenario. Converting these employment projections into an estimate of the demand for employment space suggests that between 540,000 sqm and 1,180,000 sqm could be required by 2030. The greatest demand is projected to come from use class B1A, General Offices. The upper scenario, with no assumption on space capacity within current stock, suggests that demand for this class could be 376,000 sqm.

Figure 5: Employment space demand 2016-2030, upper and lower range



Source: UUEPC

Appendix 1: The Cambridge Business School, UUEPC UK forecast model

A detailed exposition of the UK Forecast Model can be found at <http://www.cbr.cam.ac.uk2>. In summary:

- UKMOD is an econometric (or structural) model. It describes how sets of exogenous variables (i.e. determined outside the model, such as world trade or the oil price), policy instruments and economic shocks, determine a set of endogenous variables (e.g. GDP or price inflation).
- The model is Keynesian in that it is largely concerned with determining demand. The structure of the model is conventional within the Keynesian tradition with aggregate demand determined as the sum of household consumption, investment, government consumption, exports and imports. Supply side variables such as capital stock and labour supply are determined endogenously, (or semi-endogenously in the case of labour). It is thus substantially different from the Government's OBR model, and similar models, which are based on forecasting the trend in the UK economy's potential output and the economy's path back to that trend from any given starting point.
- The model is based on relationships and interrelationships econometrically estimated on past annual data.
- The model consists of 250 variables with data from 1950 to the present, 80 econometric equations and 145 identities
- The model is based on the post-Keynesian approach of Wynne Godley described in *Monetary Economics* by Godley and Lavoie 2007:
 - 4 sector approach: households, companies, government and foreign
 - Stock-flow consistent with tendency for ratios of assets to incomes not to diverge too far from long-term averages
 - Consumer spending depends on borrowing as well as income, assets and liabilities
 - Mark-up pricing (i.e. consumer prices rise with wage and other costs of production)
 - Wages determined as attempts to gain a traditional share of value-added but constrained by changes in the employment rate.
- The forecasts generated by the model are conditional on a number of exogenous variables chiefly reflecting government fiscal policy and economic conditions outside the UK. Key exogenous variables are
 - World trade (weighted by UK markets)
 - Government fiscal policy plans (tax rates and nominal spending plans)
 - Short-term interest rate (used as a policy variable to target consumer price inflation)
 - Interest rates in USA
 - Global price of oil and other raw materials
- Of particular relevance to future employment space requirements is how the forecast model addresses the labour market and sectoral employment. Unlike the OBR (which uses assumptions) UKMOD uses an econometric equation to forecast the number of people employed in the market sector. The equation has a long-term relationship between employment in the market sector and GDP, the capital-labour ratio, real average wages in the market sector, the level of house building and interest rates. There is also a term for the real value of company shares. This equation has some unconventional features, including a strong long-term influence from interest rates. Market sector employment has a substantial impact on the over-all macro-economic forecast and is sensitive to precise specification. The equation includes terms for labour demand (GDP) and supply (real wage).

² http://www.cbr.cam.ac.uk/fileadmin/user_upload/centre-for-business-research/downloads/working-papers/wp472.pdf

- Other long-term influences in the equation are the capital-labour ratio and the interest rate. The capital-labour ratio has a negative coefficient indicating that when capital replaces labour, employment will be lower for any given level of GDP. The inclusion of an interest rate term reflects the repayment cost of existing debt. When this is high post-interest profits are reduced and pressure to cut costs, including labour, is increased. This is an important factor in the unexpectedly high level of job creation during the period of unprecedentedly low interest rates since 2008.
- The LFS measure of the number of people unemployed and available for work is also forecast using an equation. In this equation the long-term influences on the number of unemployed people are: GDP, the number of people employed, the size of the working-age population and the number of people aged over 64 in employment. The latter are likely to displace more people of working age into unemployment for any given level of jobs. The number of new firms formed each year also appears to have a direct impact on unemployment, over and above its impact on jobs. The number of over-64s in employment is forecast as a trend. This is predicted to increase from around 1 million to 2 million over ten years. International migration of working-age people into the UK has short-term influences on unemployment through its impact on the working-age population. In the long term the rise in unemployment is offset by higher employment induced via lower wages caused by the higher migration.

Appendix 2: Use Class by Sector

Sub category	Sub sector	Density (Sq metres)	Midpoint	Agriculture	Mining and quarrying	Manufacturing	Utilities	Water supply & waste	Construction	Retail	Transportation	Accommodation	Information & Comm's	Financial activities	Real estate	Professional & scientific	Administration services	Public Admin' & defence	Education	Health & social work	Arts and entertainment	Other services
Retail	High Street	15-20	17.5	0%	0%	0%	0%	0%	0%	45%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	Foodstore	15-20	17.5	0%	0%	0%	0%	0%	0%	18%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	Retail Warehouse	90	90	0%	0%	0%	0%	0%	0%	9%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	Finance and professional services	16	16	0%	0%	0%	0%	0%	0%	9%	0%	0%	0%	70%	0%	8%	0%	0%	0%	0%	0%	0%
General Offices	Restaurants & Cafes	15-20	17.5	0%	0%	0%	0%	0%	0%	18%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%
	Corporate	13	13	0%	0%	0%	0%	0%	0%	0%	14%	0%	7%	0%	30%	0%	16%	0%	30%	30%	14%	15%
	Prof services	12	12	0%	0%	0%	0%	0%	0%	0%	0%	0%	33%	0%	70%	38%	16%	0%	0%	0%	0%	0%
	Public sector	12	12	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	15%	8%	100%	70%	70%	0%	0%
	TMT (Tech, media & telecoms)	11	11	0%	0%	0%	0%	0%	0%	0%	0%	0%	20%	0%	0%	0%	8%	0%	0%	0%	0%	0%
	Finance and insurance	10	10	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	30%	0%	0%	32%	0%	0%	0%	0%	0%
	Call centres	8	8	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	R&D Space	40-60	50	0%	0%	30%	0%	0%	0%	0%	0%	0%	0%	0%	0%	15%	0%	0%	0%	0%	0%	0%
	Light Industrial	47	47	50%	0%	50%	0%	0%	0%	0%	0%	0%	0%	0%	0%	8%	0%	0%	0%	0%	0%	0%
	Industrial and manufacturing	36	36	0%	0%	20%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Storage and distribution	National distribution centre	95	95	0%	0%	0%	0%	0%	0%	0%	29%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	Regional distribution centre	77	77	0%	0%	0%	0%	0%	0%	0%	29%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	Final mile distribution centre	70	70	0%	0%	0%	0%	0%	0%	0%	29%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Small Business Workspace	Incubator	30-60	45	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	0%	8%	4%	0%	0%	0%	7%	8%
	Maker spaces	15-40	27.5	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	0%	8%	4%	0%	0%	0%	7%	8%
	Studio	20-40	30	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	0%	0%	4%	0%	0%	0%	14%	15%
	Co-working	10-15	12.5	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	0%	0%	4%	0%	0%	0%	14%	15%
Data centres	Managed workspace	12-47	29.5	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	0%	0%	4%	0%	0%	0%	7%	8%
	Wholesale	200-950	575	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	Wholesale dark site	440-1400	920	50%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Hotels	Co-location facility	180-540	360	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	Limited service/budget	1 per 5 beds	50	0%	0%	0%	0%	0%	0%	0%	0%	25%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	Mid-scale	1 per 3 beds	50	0%	0%	0%	0%	0%	0%	0%	0%	25%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	Upscale	1 per 2 beds	50	0%	0%	0%	0%	0%	0%	0%	0%	25%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	Luxury	1 per 1 bed	50	0%	0%	0%	0%	0%	0%	0%	0%	25%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Fitness centres	Budget	100	100	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	Mid Market	65	65	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	Family	65	65	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	8%
	Cinema	200	200	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	8%
Visitor and cultural attractions	Visitor and cultural attractions	30-300	165	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	8%
	Amusement and entertainment centres	70	70	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	8%
				100%	0%	100%	0%	0%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%