

WHERE'S BELFAST GOING?

STATE OF THE CITY CONFERENCE

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April 2007

FIVE QUESTIONS

1. What State of English Cities?
2. What State of Belfast Then?
3. What State of Belfast Now?
4. How Well is System Coping?
5. So What for Belfast?

Big Picture

- Belfast - NI story in spades
- Real progress
- Big opportunities & challenges
- Internally – tectonic plates shifted
- Externally – fierce global competition
- Run faster stand still

- System outer limits capacity
- Progress despite system
- Trust, partnership, capacity, performance needed
- Huge opportunity could pass by
- Time real, grown-up leadership

1. WHAT STATE ENGLISH CITIES?

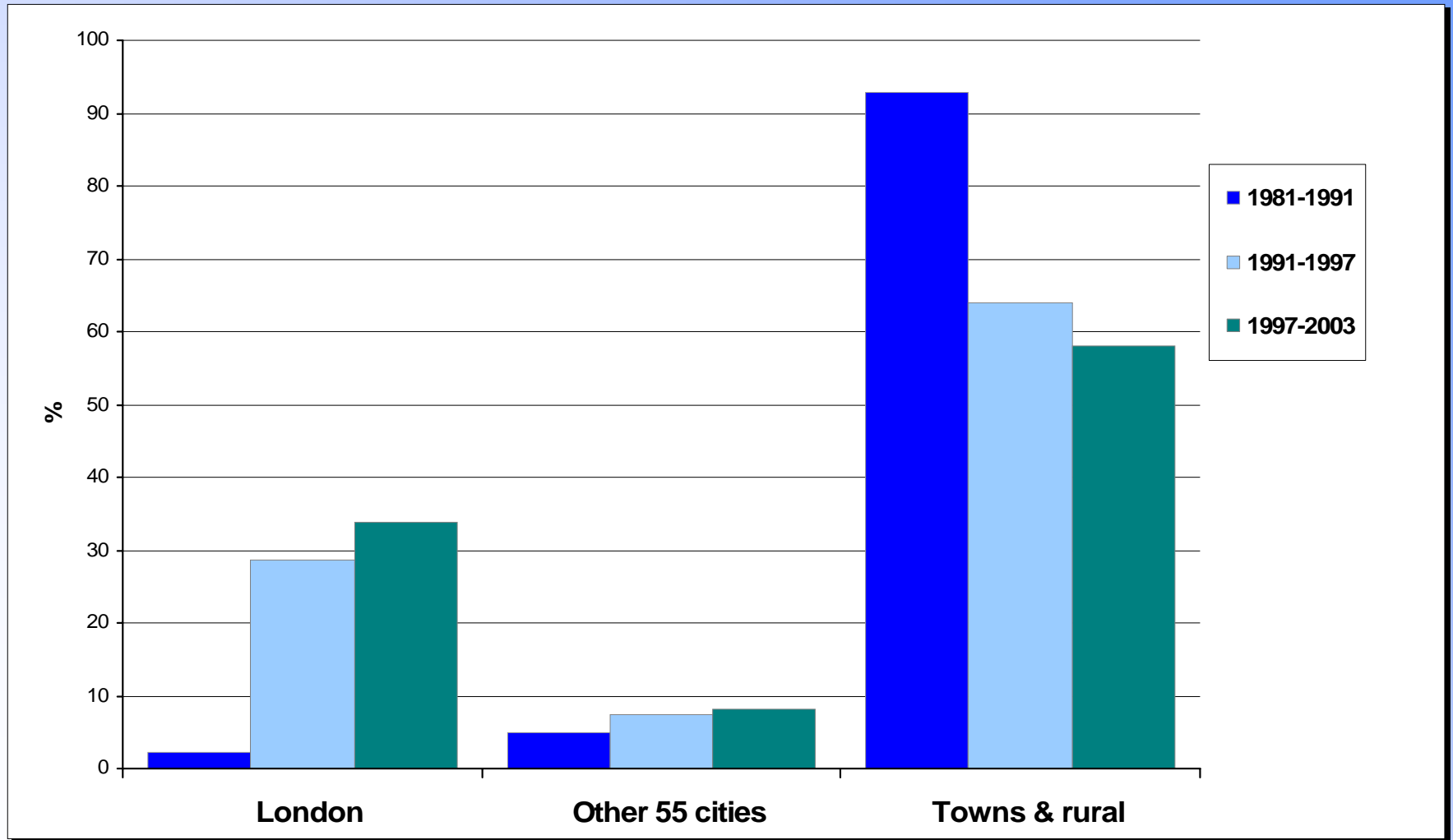
- Cities crucial economic success
- London global star
- Policy going right direction
- Sustain & expand renaissance
- Learn successful cities abroad
- Trust cities
- Let go

Picking Up, Catching Up, Staying Up?

Picking up

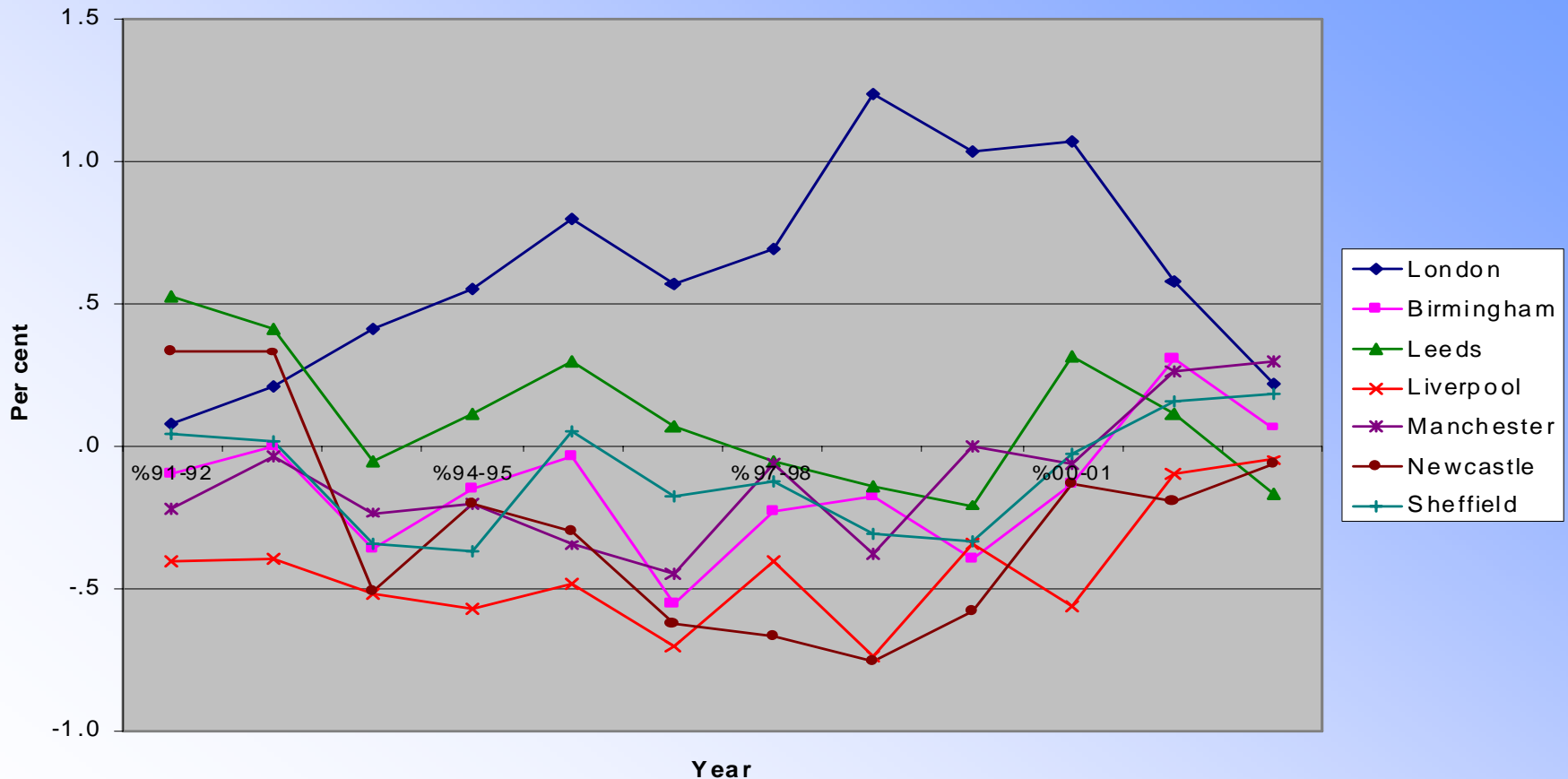
- Population
- Jobs
- Liveability
- Cohesion
- Competitiveness

Cities Contributing More to Population Growth



Mets Closing Gap London

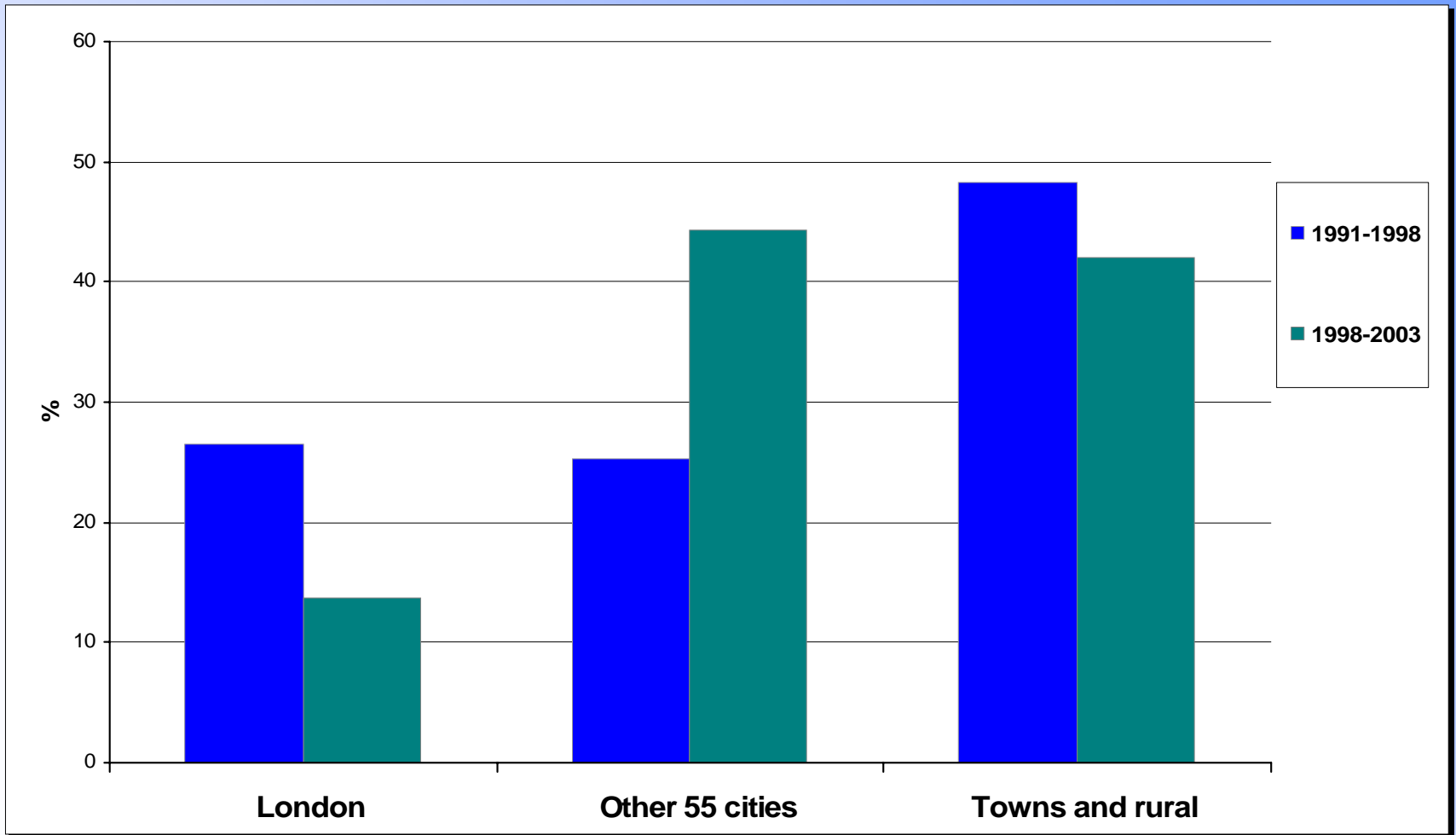
Annual population change rate (%), 1991-92 to 2002-03, London and the Mets



Jobs

- Even more important
- 58% population, 63% jobs
- Contribution to growth increasing
- More outside London helping

Growing Contribution to Jobs



Social Cohesion

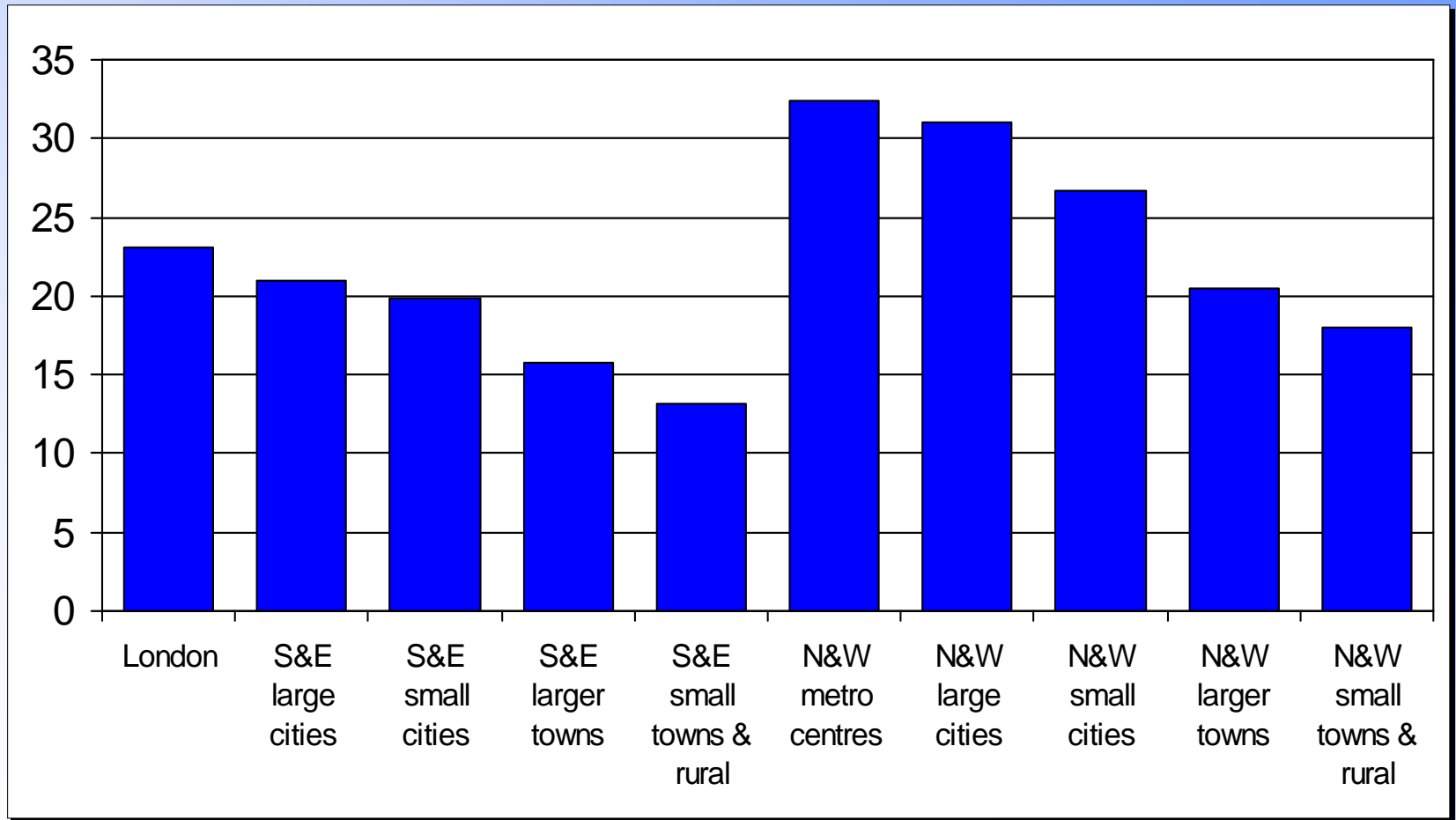
Picking up!

- Employment up some poorest
- Health better
- Education up
- More degrees
- Vehicle crime, burglaries down

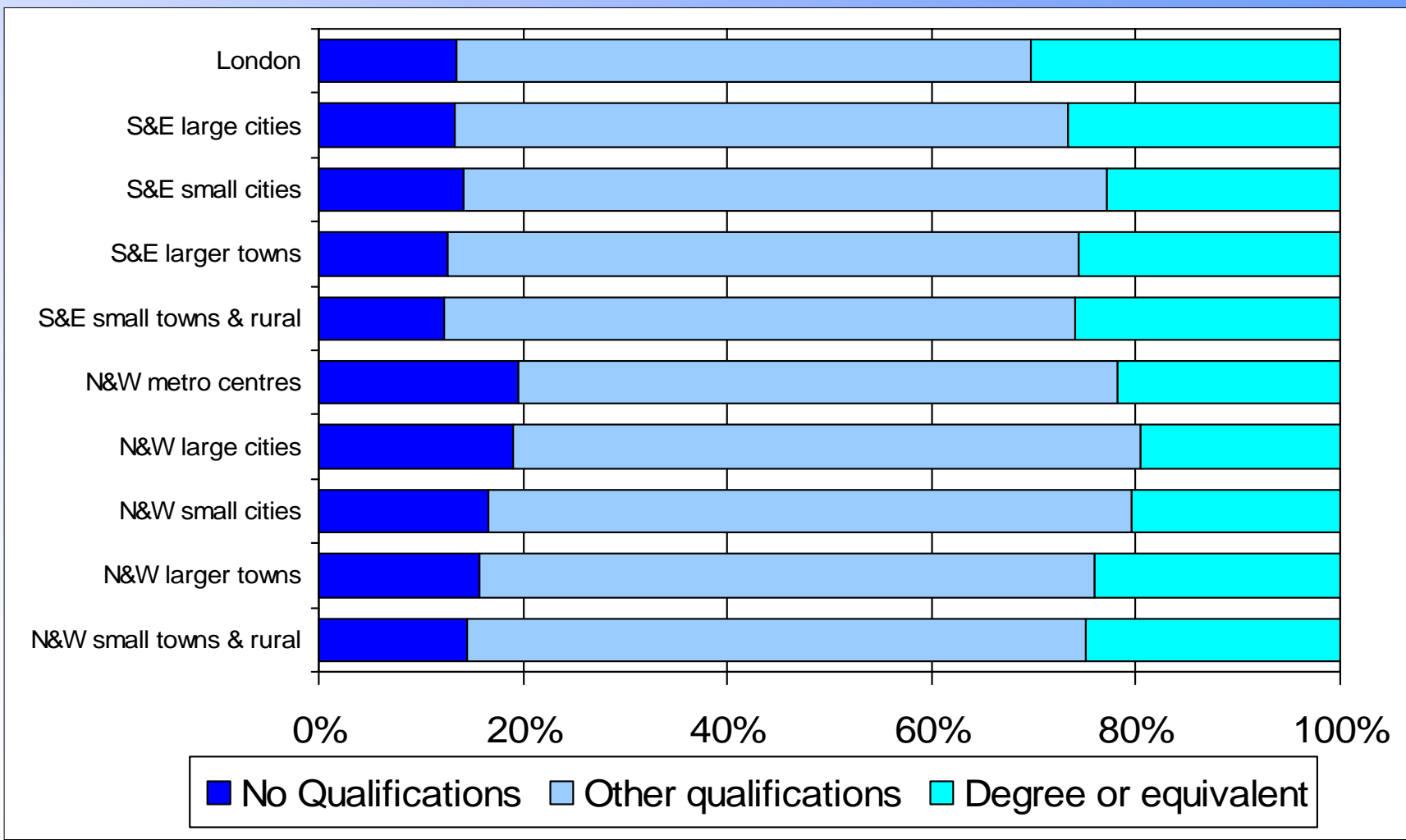
Not catching up

- Deprivation worse
- Unemployment, worklessness worse
- Health worse
- Gap rich/poor neighbourhoods bigger
- School attainment lower
- Crime higher

Overall Deprivation by City Type 2004



Skills of the Working Age Population by City Type 2003



Balance sheet cohesion

- All cities improved
- Cities south and east done better
- Best at start improved most
- Progress across country
- More needs doing close gap

Economic performance

- Many performing well
- Great differences - income, productivity, exports, skills, innovation, high value, accessibility, risk capital
- South & east, better north & west
- Not catching up or staying up

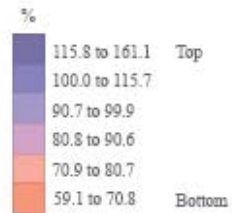
Output Uneven

Gross Value Added (GVA) per head, 2002

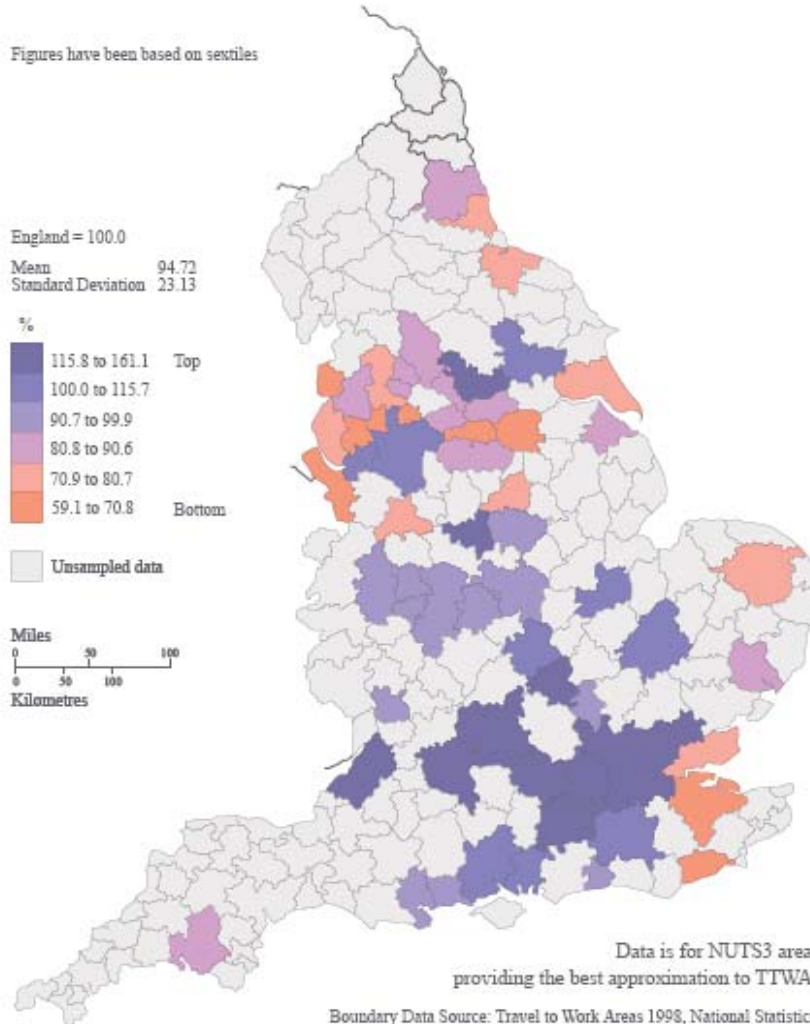
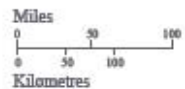
Figures have been based on sextiles

England = 100.0

Mean 94.72
Standard Deviation 23.13



Unsampled data

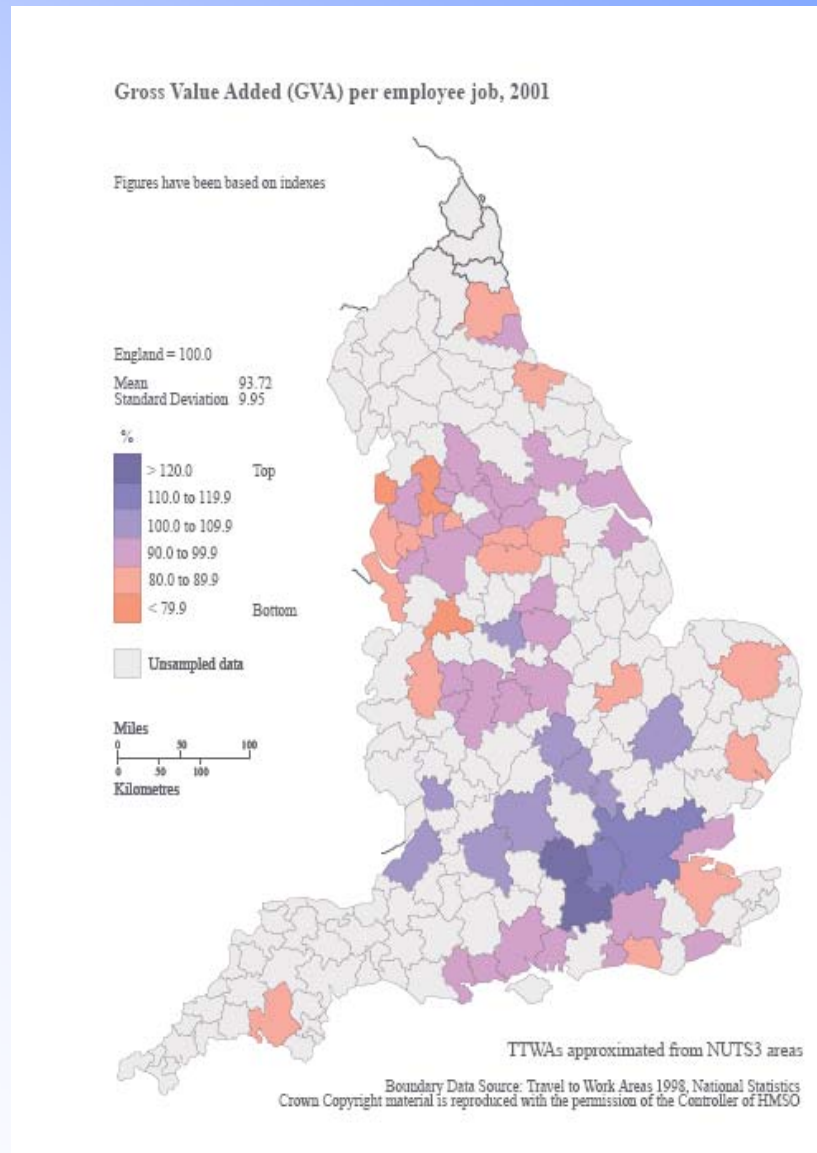


Data is for NUTS3 areas
providing the best approximation to TTWAs

Boundary Data Source: Travel to Work Areas 1998, National Statistics
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Blue – high
Orange – low

Productivity uneven



Recent improvement

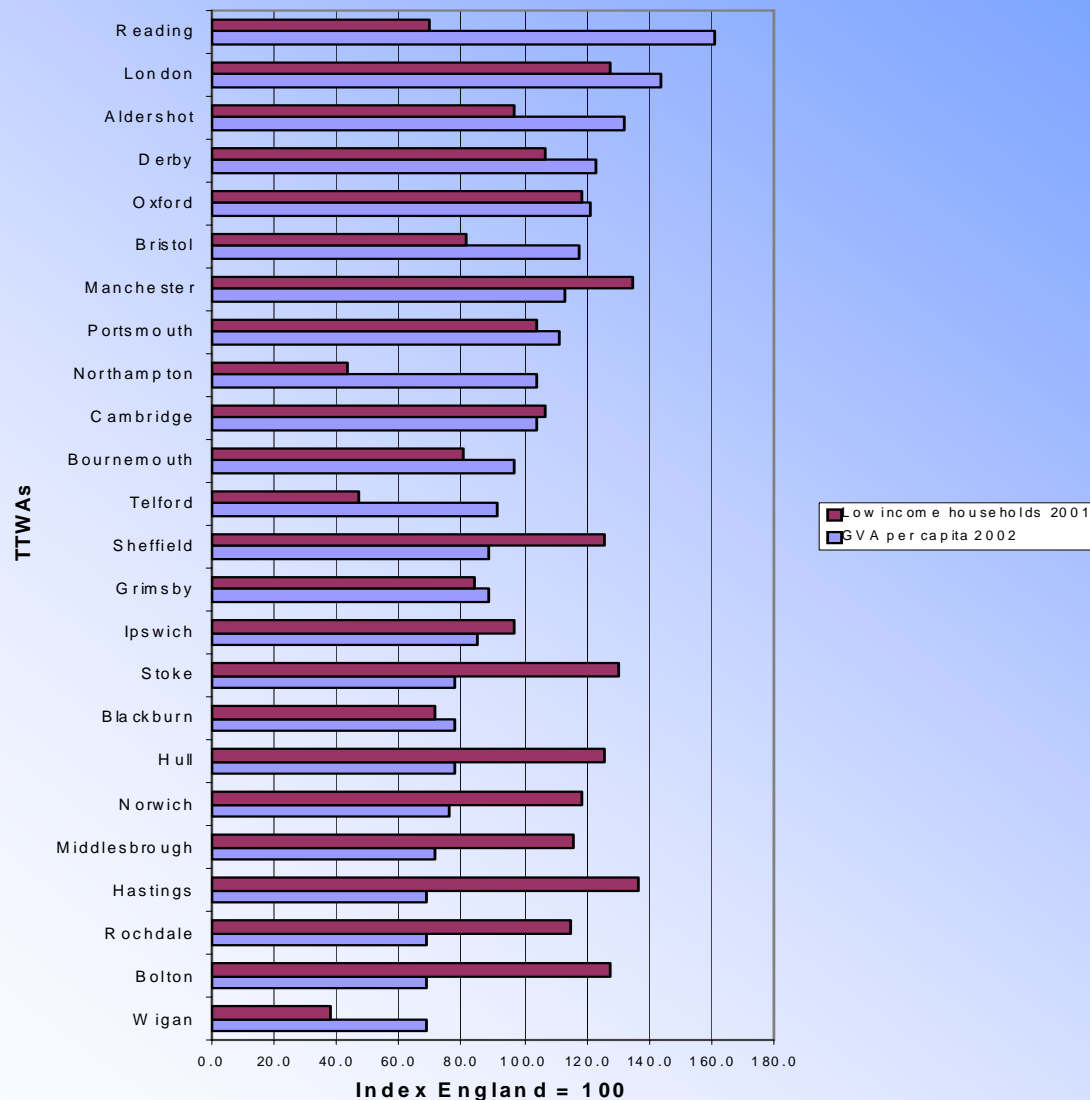
- 25 cities grew faster national average, 6 of 8 Core Cities
- 9 cities 10+% national average
- Most in the south and east
- Manchester notable exception

Economic & social success

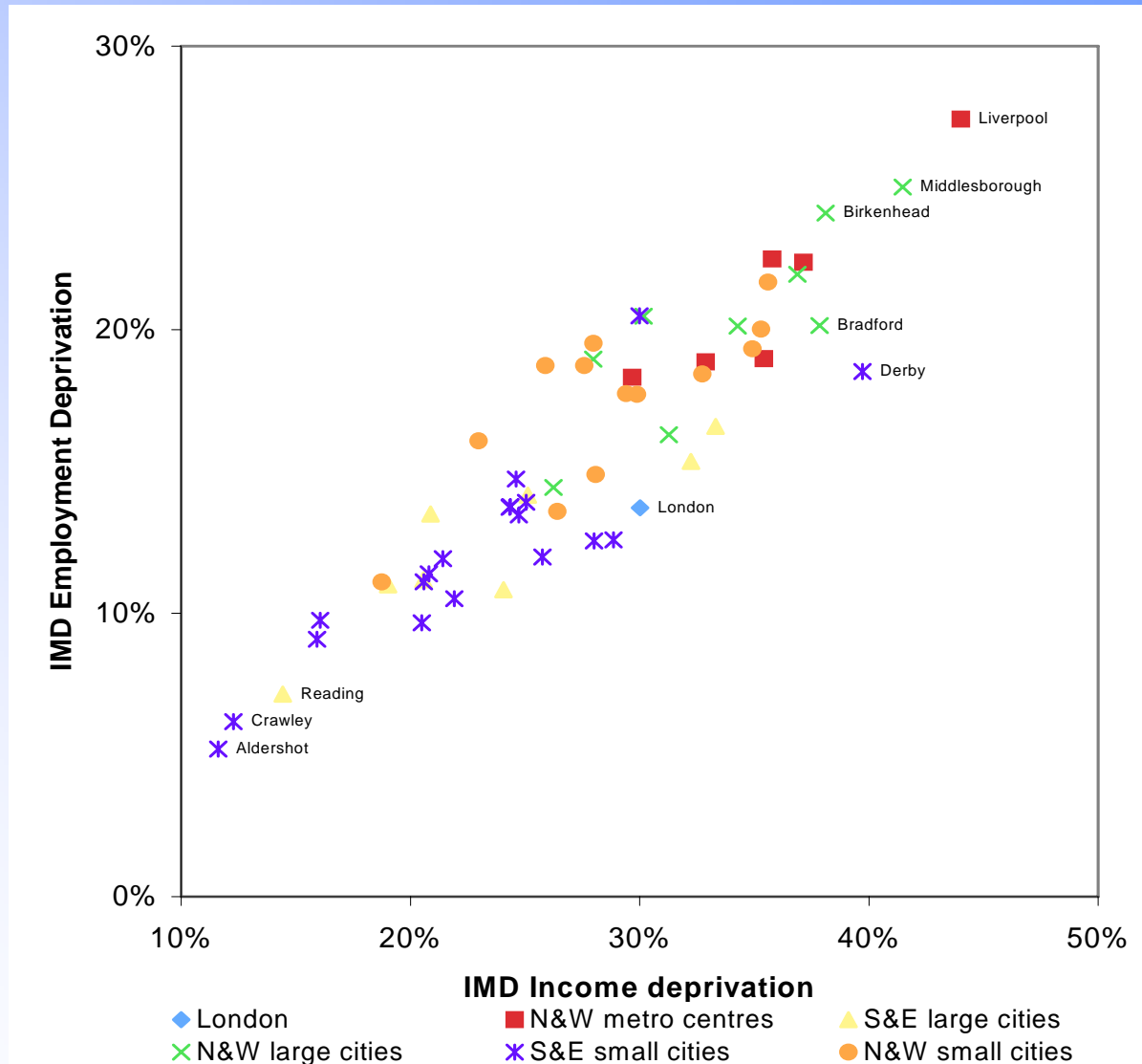
- All cities low income
- Poverty greater economy below average
- More jobs less poverty
- Competitiveness compatible cohesion

GVA per capita / low income households

GVA per capita 2002 & low income households 2001



Relationship income & employment deprivation, by individual city, 2004



Messages to Government

- Cities matter – support them
- Competitiveness, cohesion, liveability matter
- But focus on competitiveness
- All places matter
- But start big city regions

- Think and act long-term
- Fewer, strategic interventions
- Greater spatial clarity
- Trust local government more
- More contractual working
- More departments to value cities
- More departmental collaboration

Encourage

- Place making
- Local leadership
- City regions
- Delivery vehicles
- New financial instruments

DOES THAT RING ANY BELLS IN BELFAST?

2. STATE BELFAST THEN?

Bad News Then

- Innovation weak
- Low skills
- Connectivity low

Good News Then

- GVA high
- Many well qualified workers
- External perceptions better internal

What to do then?

- Increase population
- Reduce unemployment
- Improve education and skills
- Increase innovation levels
- Change balance public private
- Increase connectivity

Governance challenges then?

- Belfast not well governed
- Fragmentation & inefficiency
- Lack of trust
- Planning too slow
- Central local relations poor
- Turf, territory & conflicts

- Partnership fatigue
- Strategy fatigue
- Public private culture
- Weak local government
- Frozen attitudes and institutions

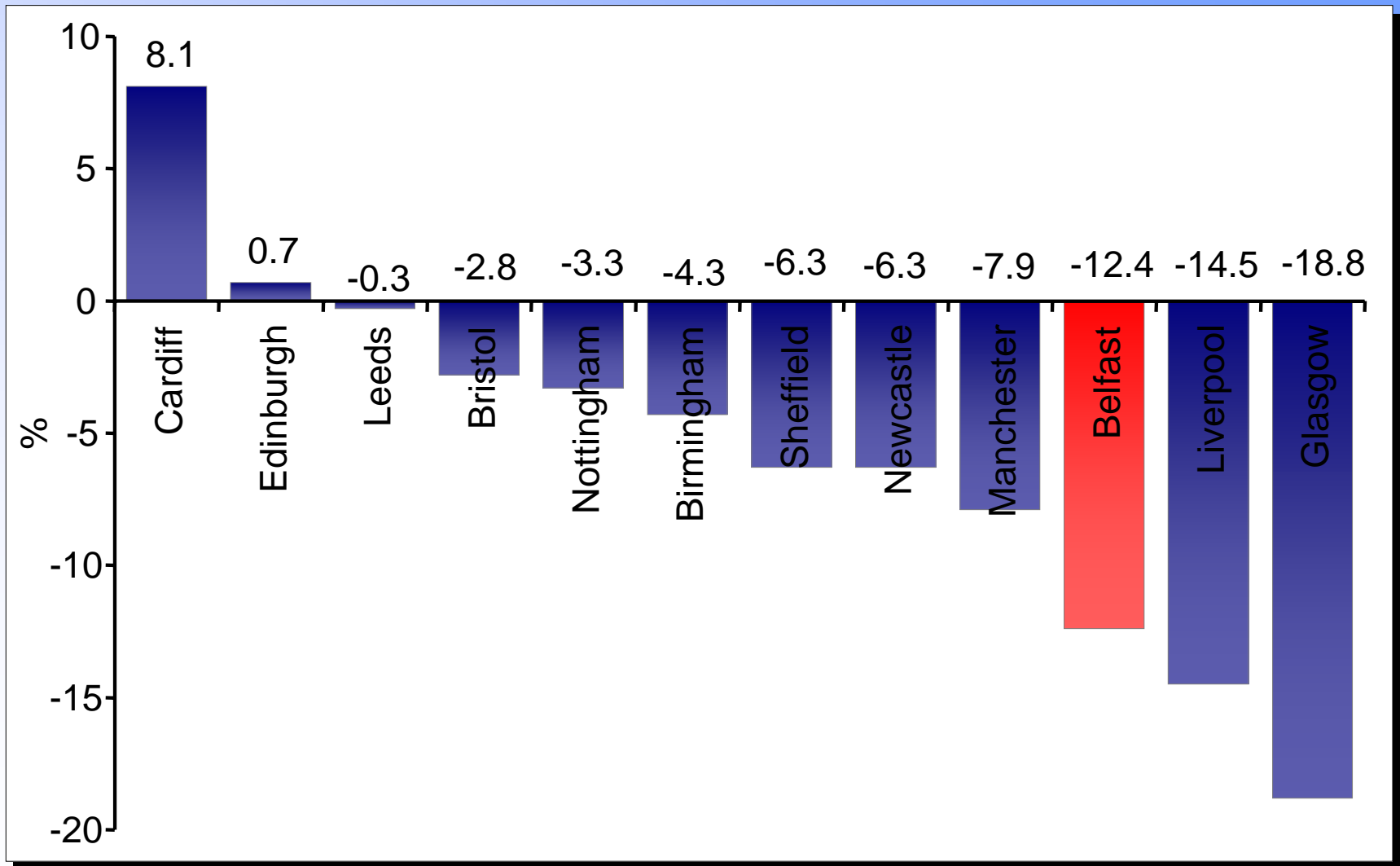
3. STATE BELFAST NOW?

What's going on?

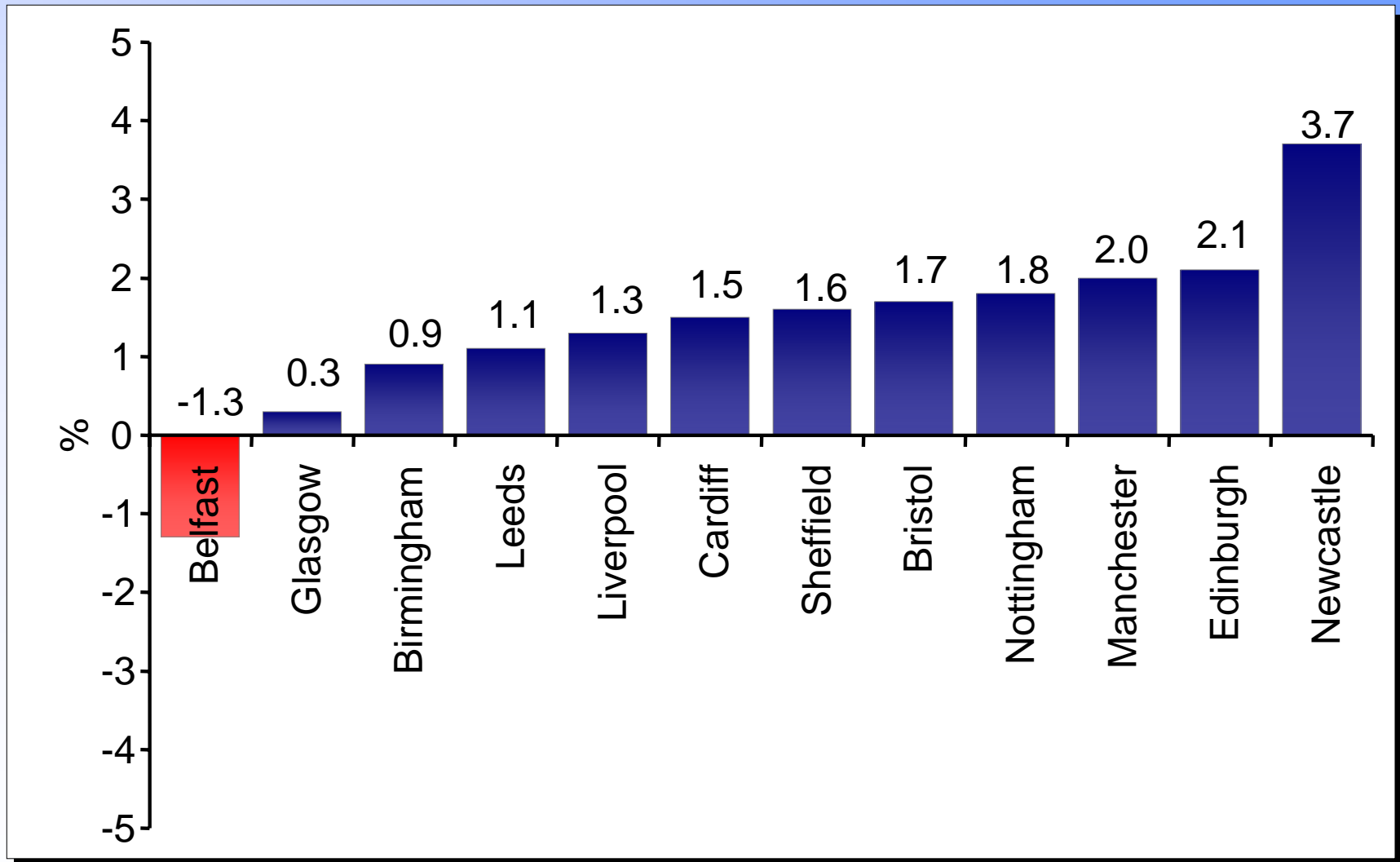
- Unfrozen
- Lots of good news
- Asset base still challenge
- Social challenges remain
- Governance turbulent
- Bits economy doing very well

The Good News

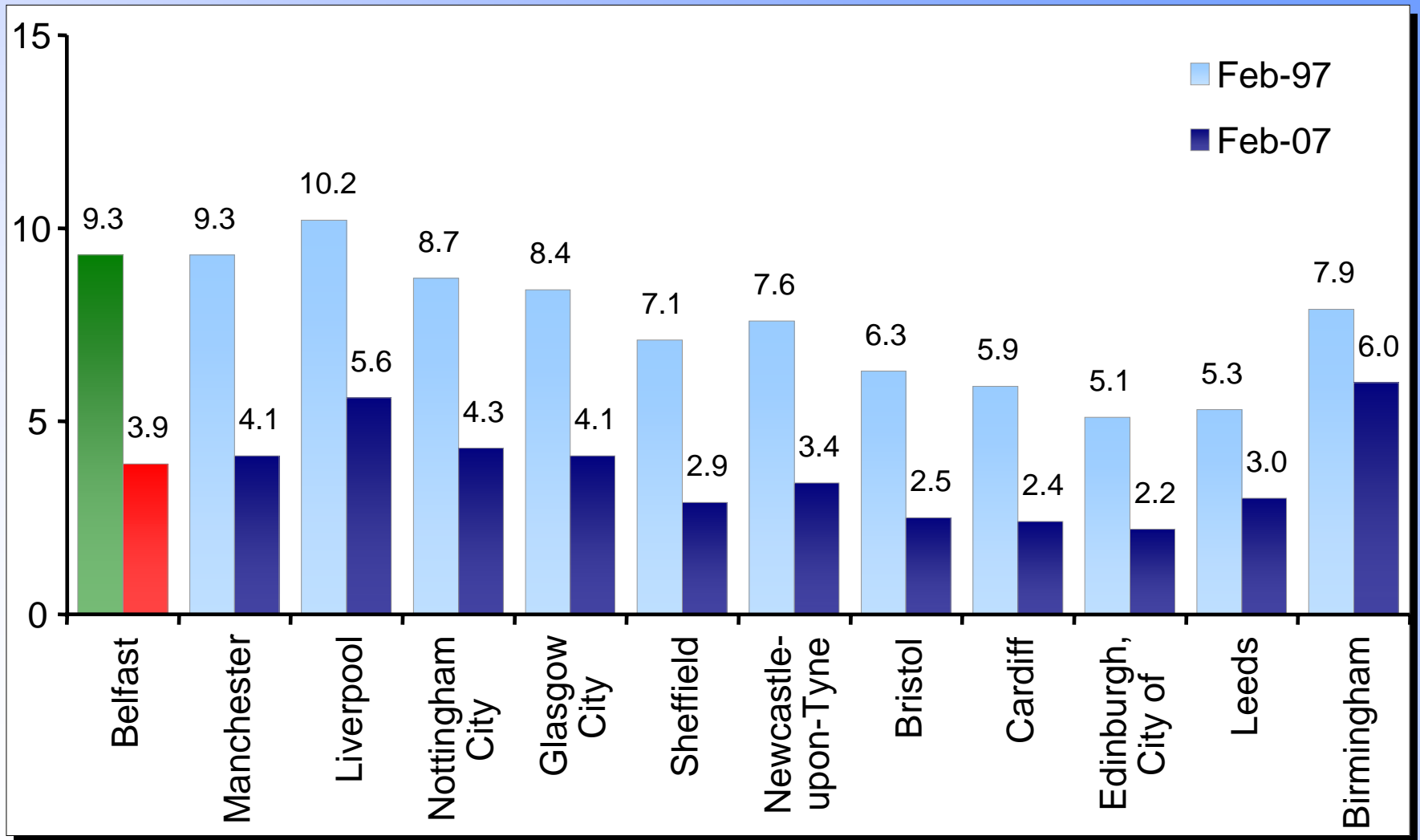
Population 1981-2001



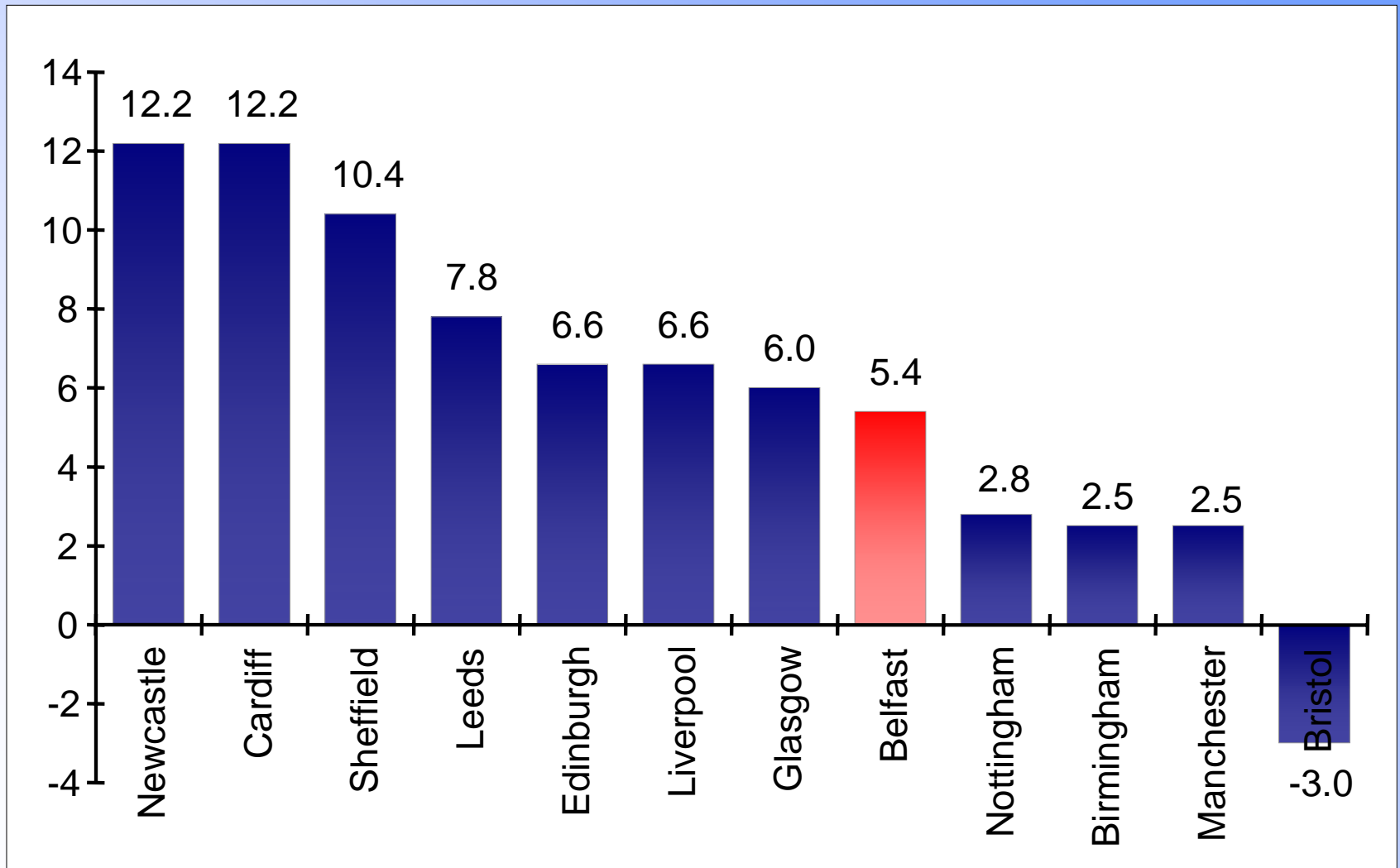
Population 2003-2005



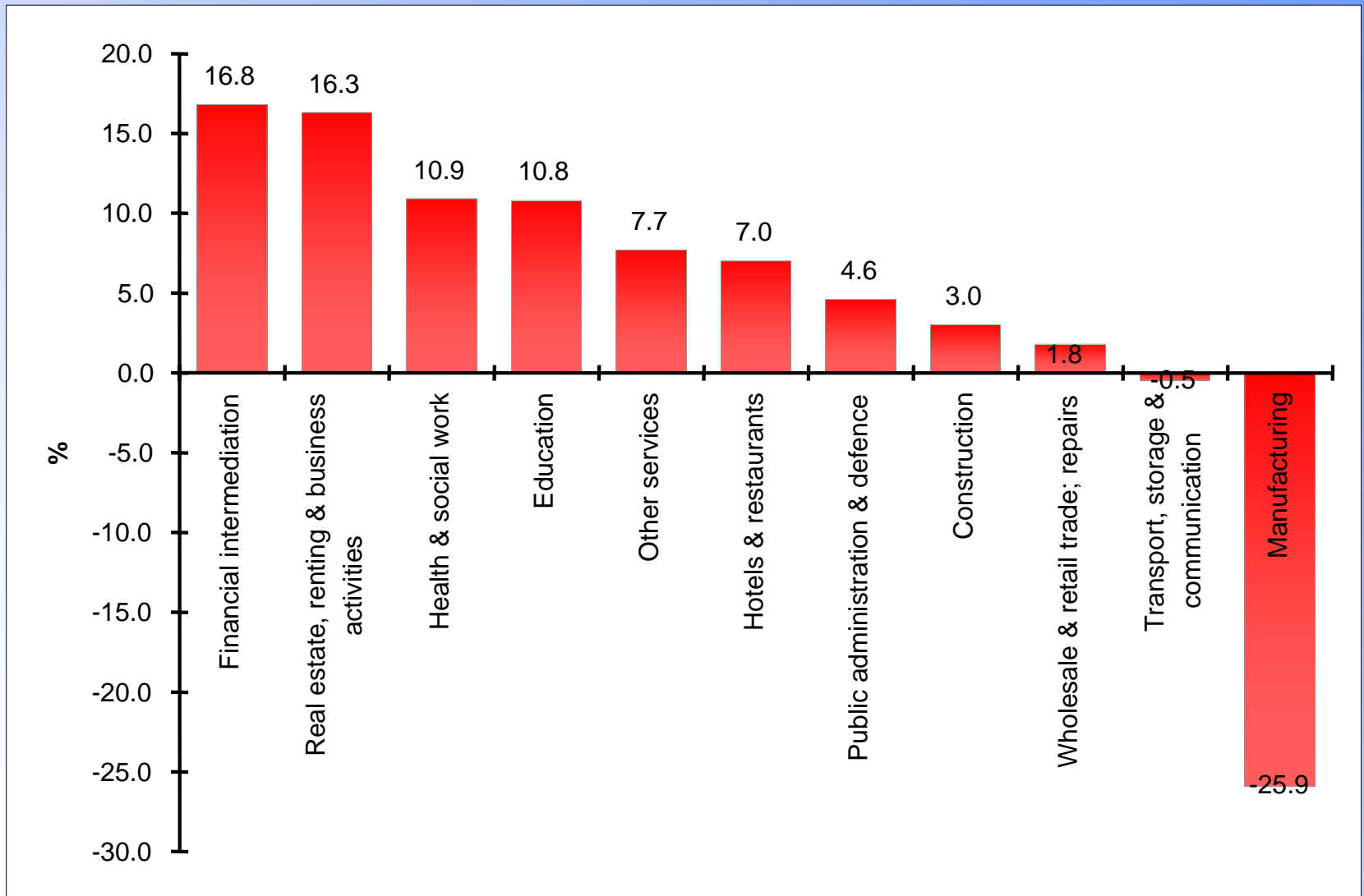
Unemployment 1997-2007



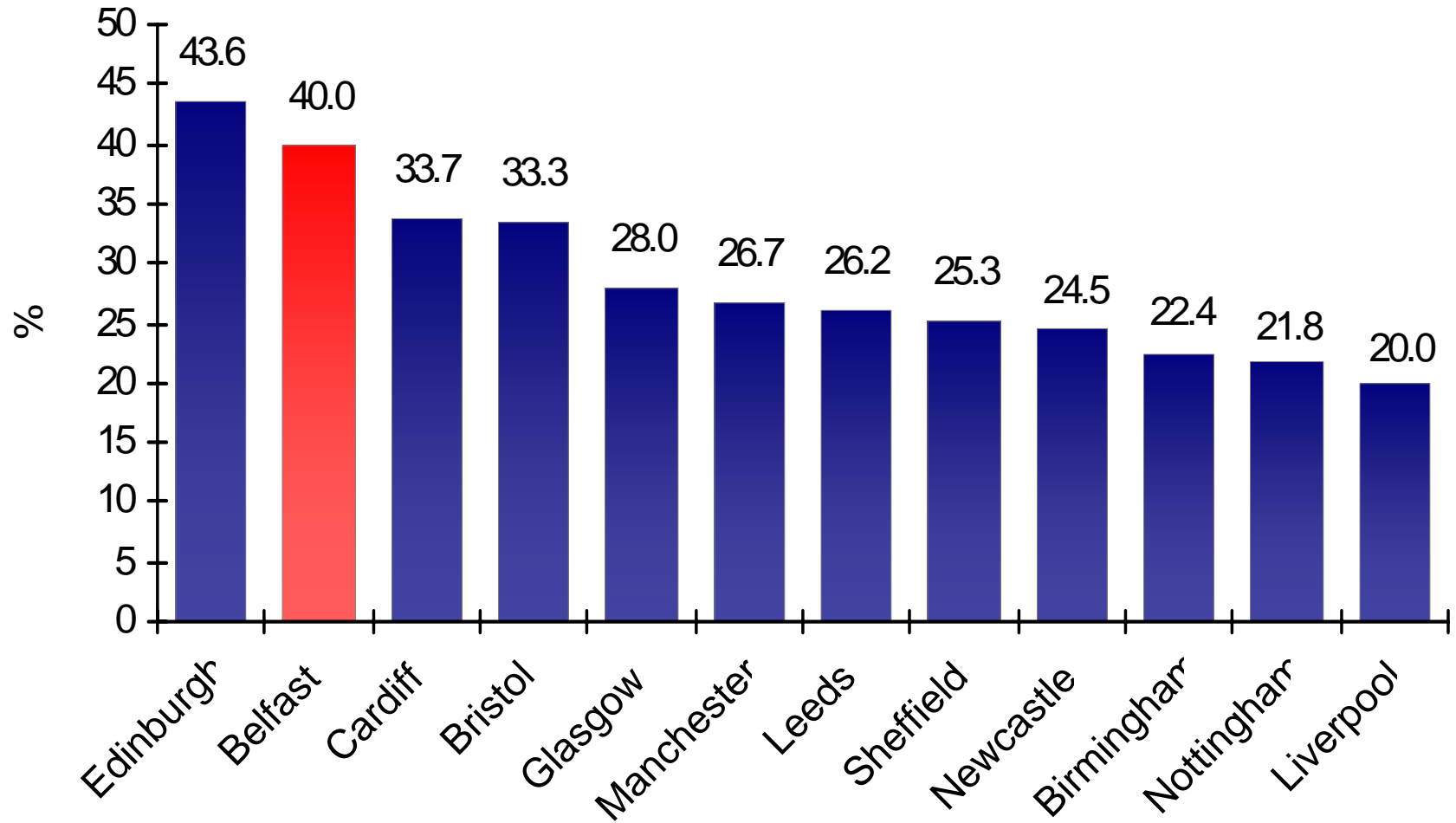
Employment change 2001-05



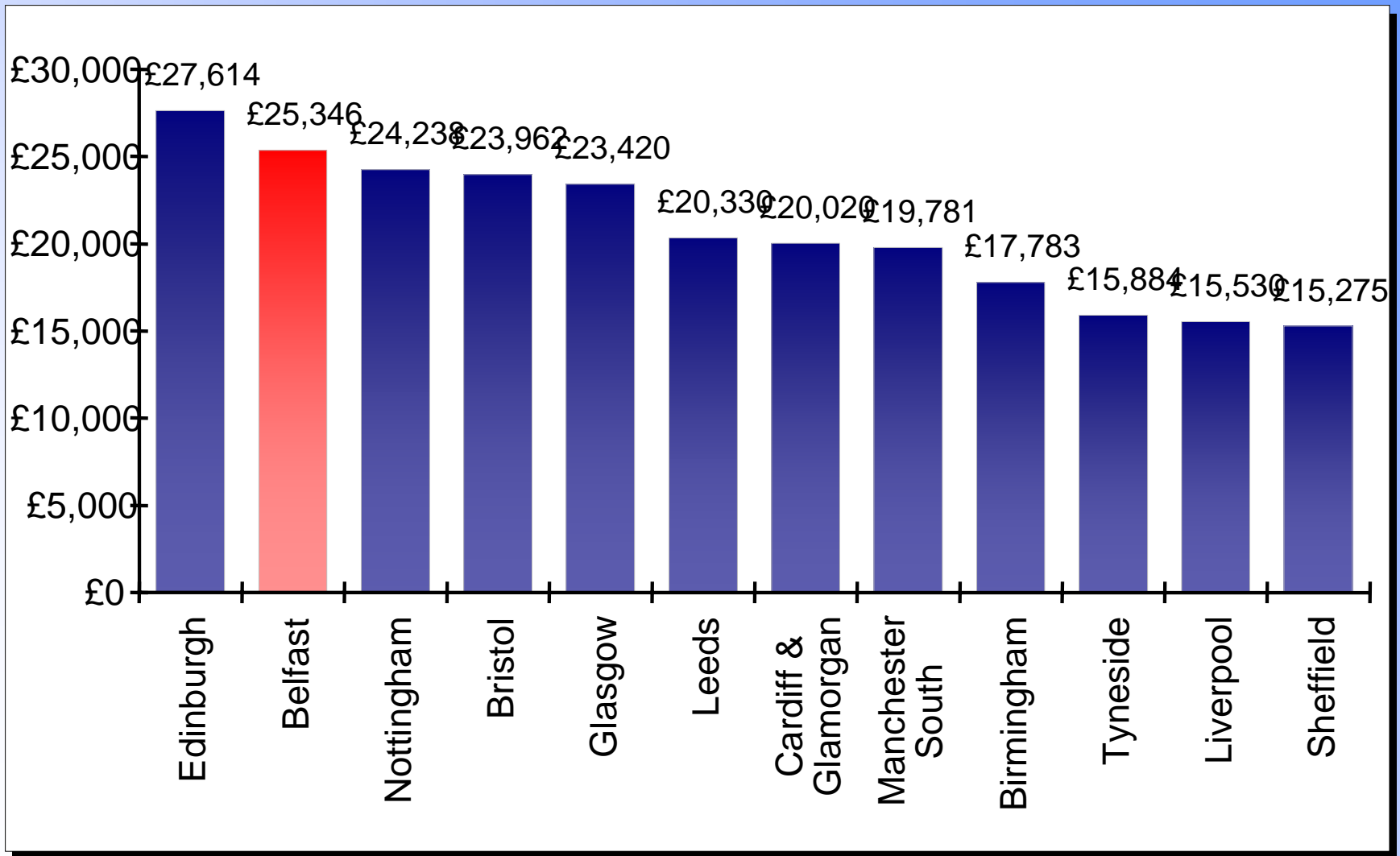
Sectoral change 2001-05



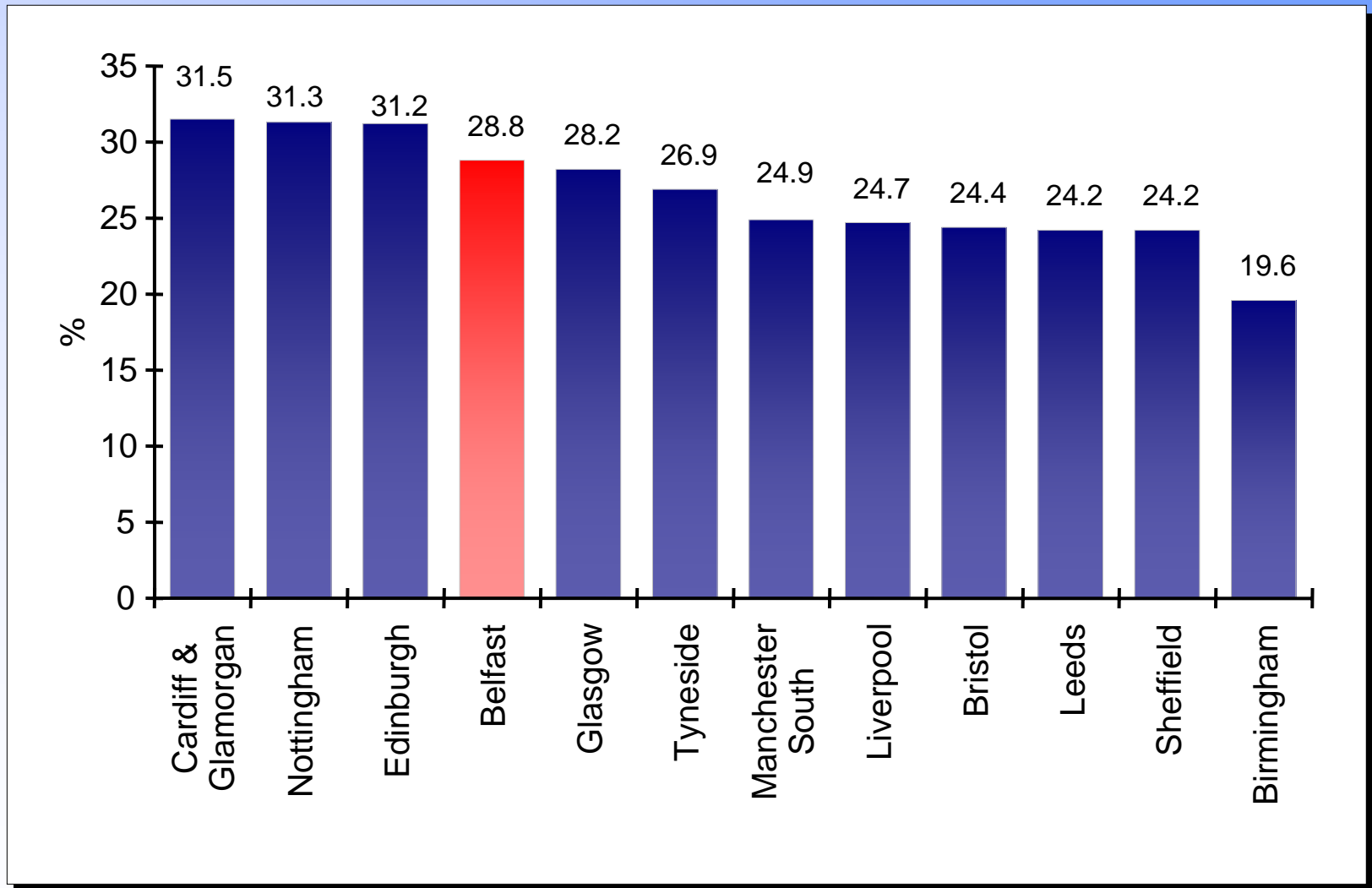
NVQ Level 4+ 2005



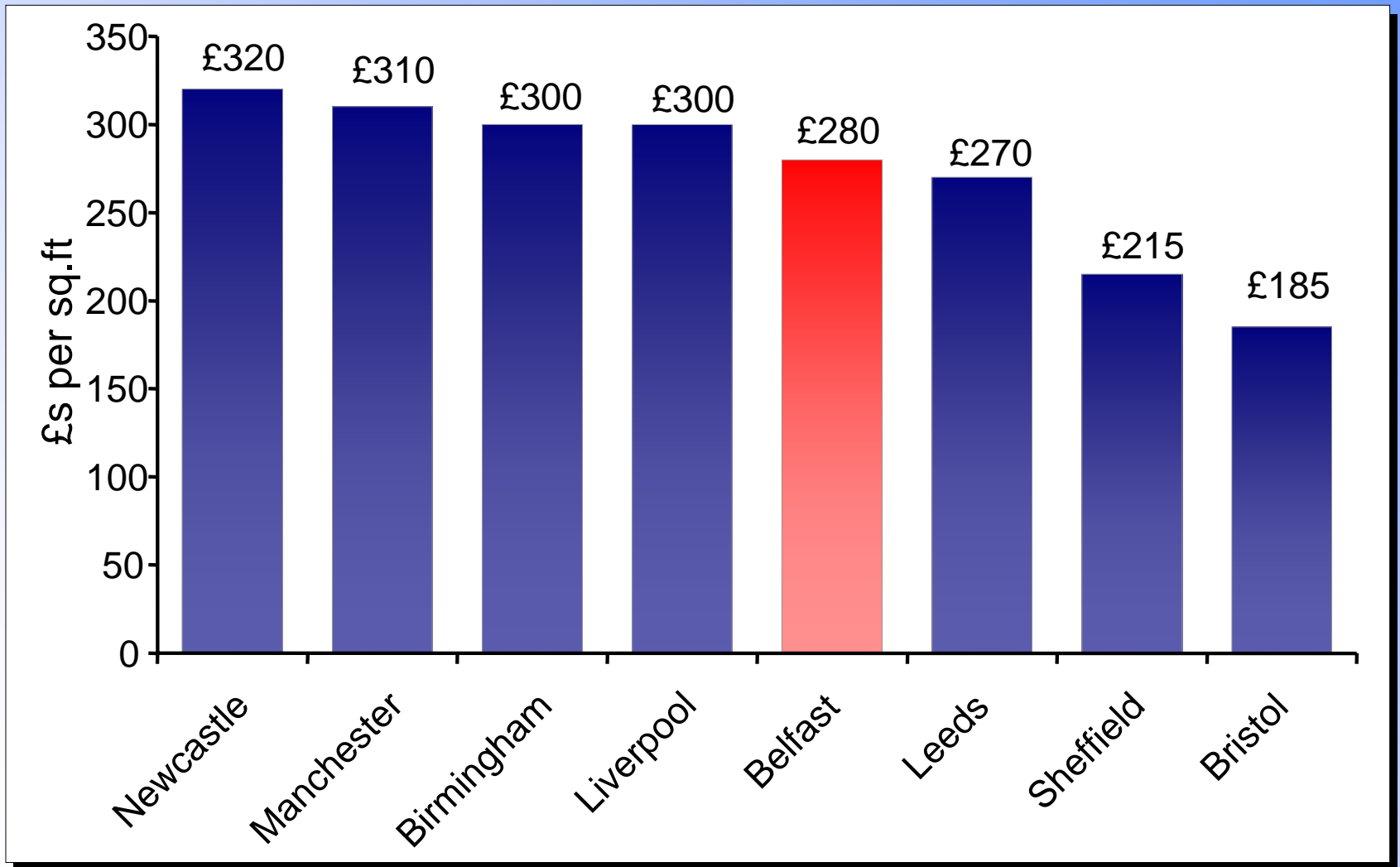
GVA per capita 2004



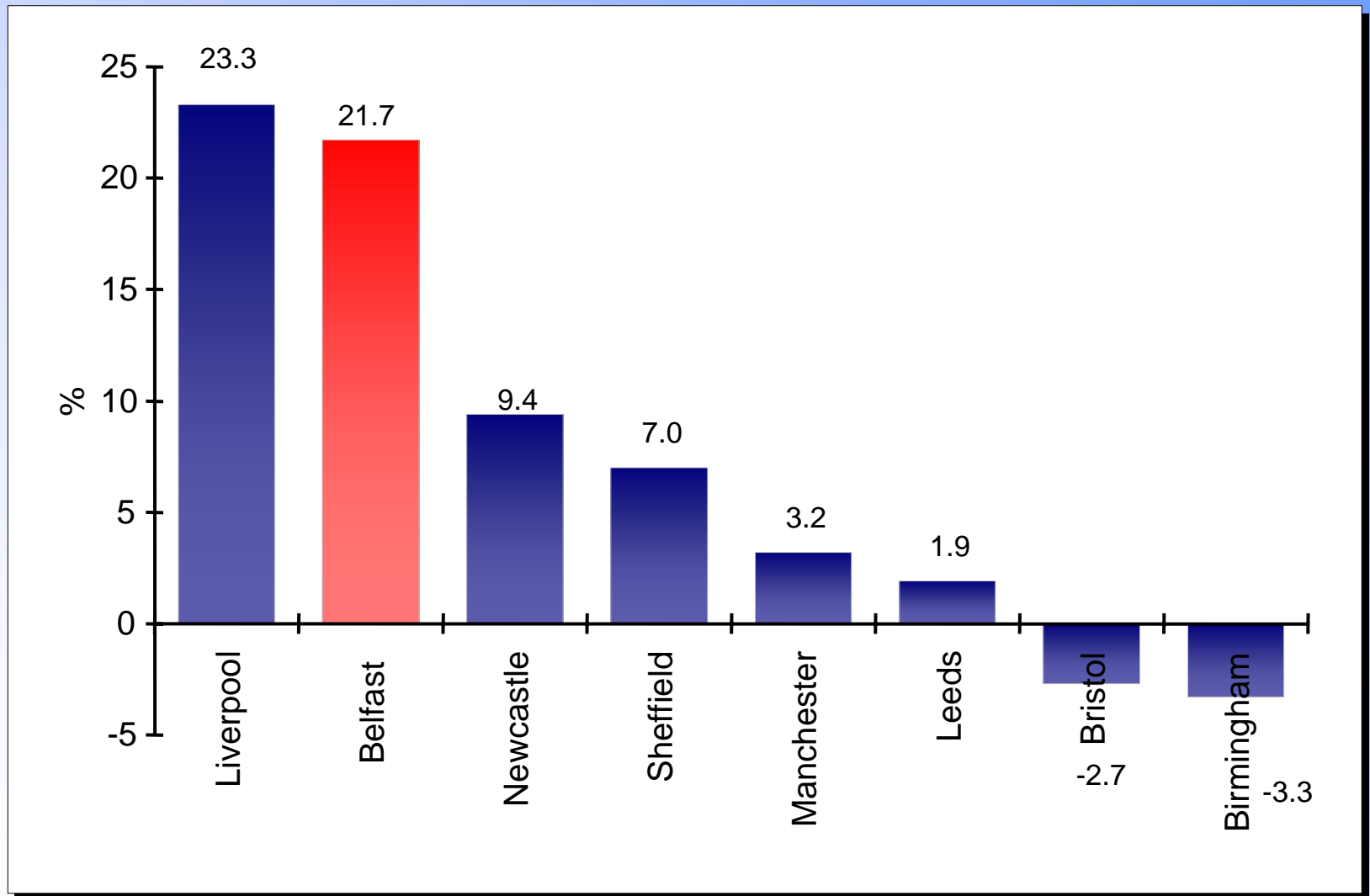
GVA per capita % change 2000-04



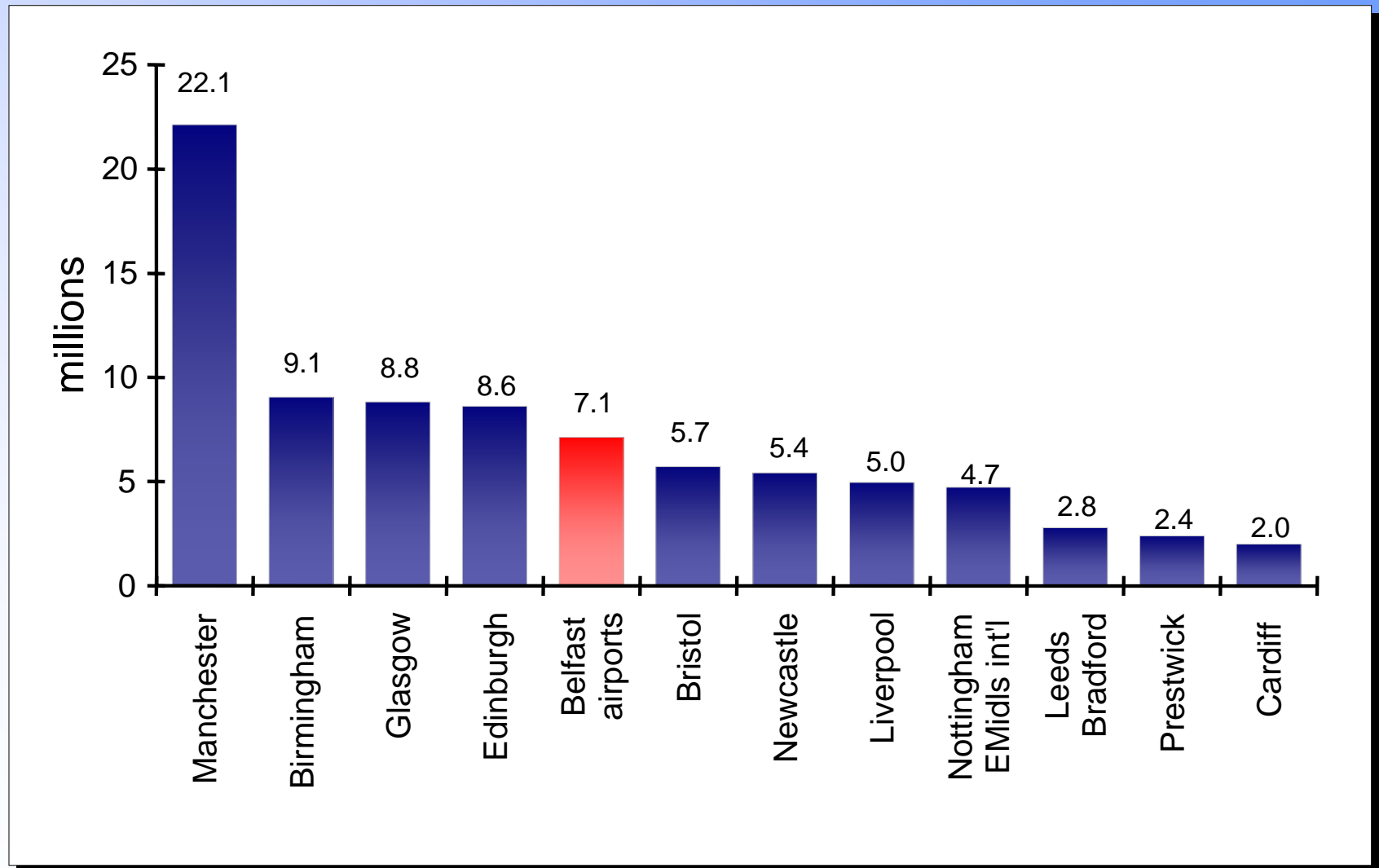
Retail rents 2005



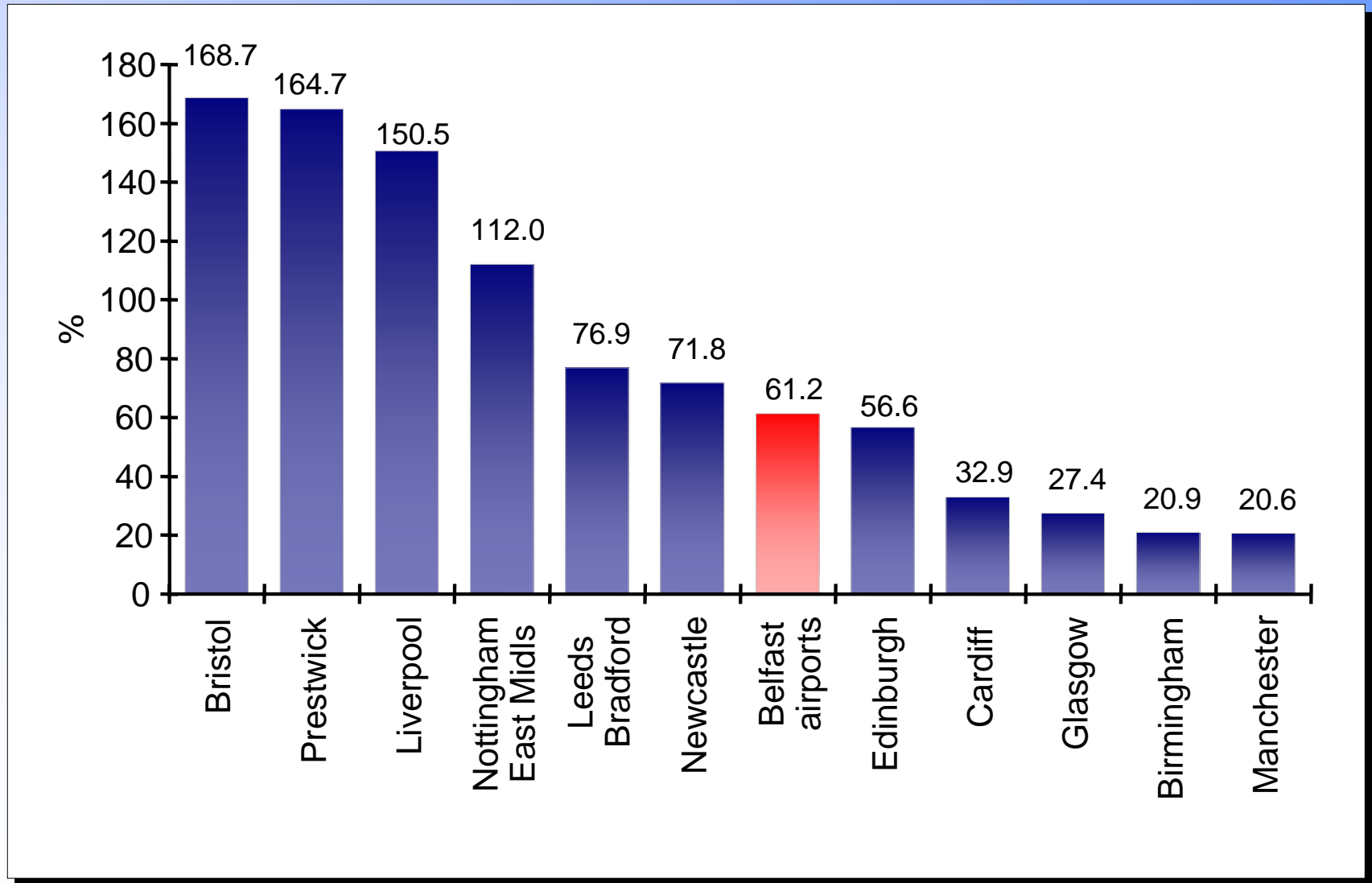
Change retail rents 2001-05



Airport passengers 2006

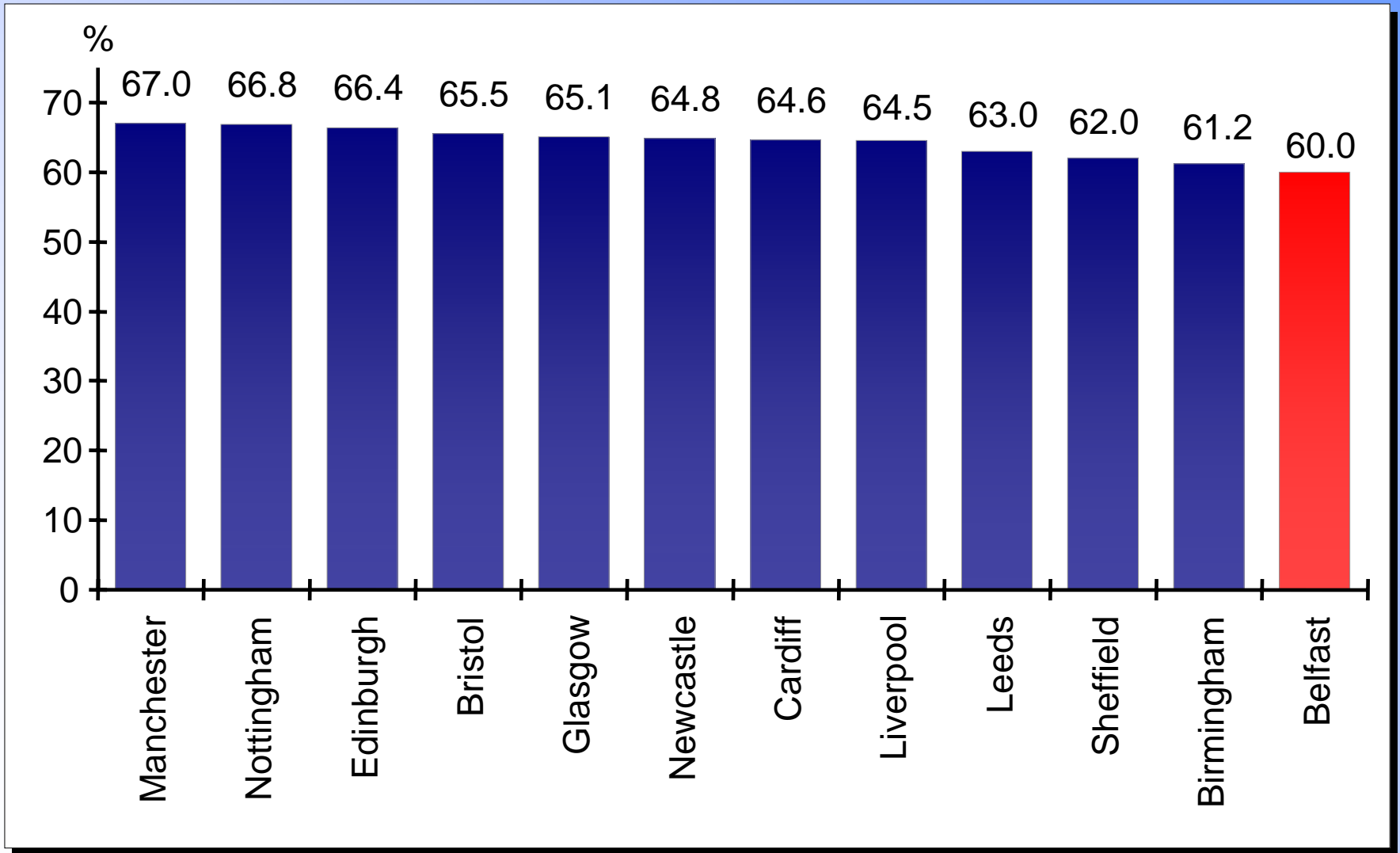


Change airport passengers 2000-06

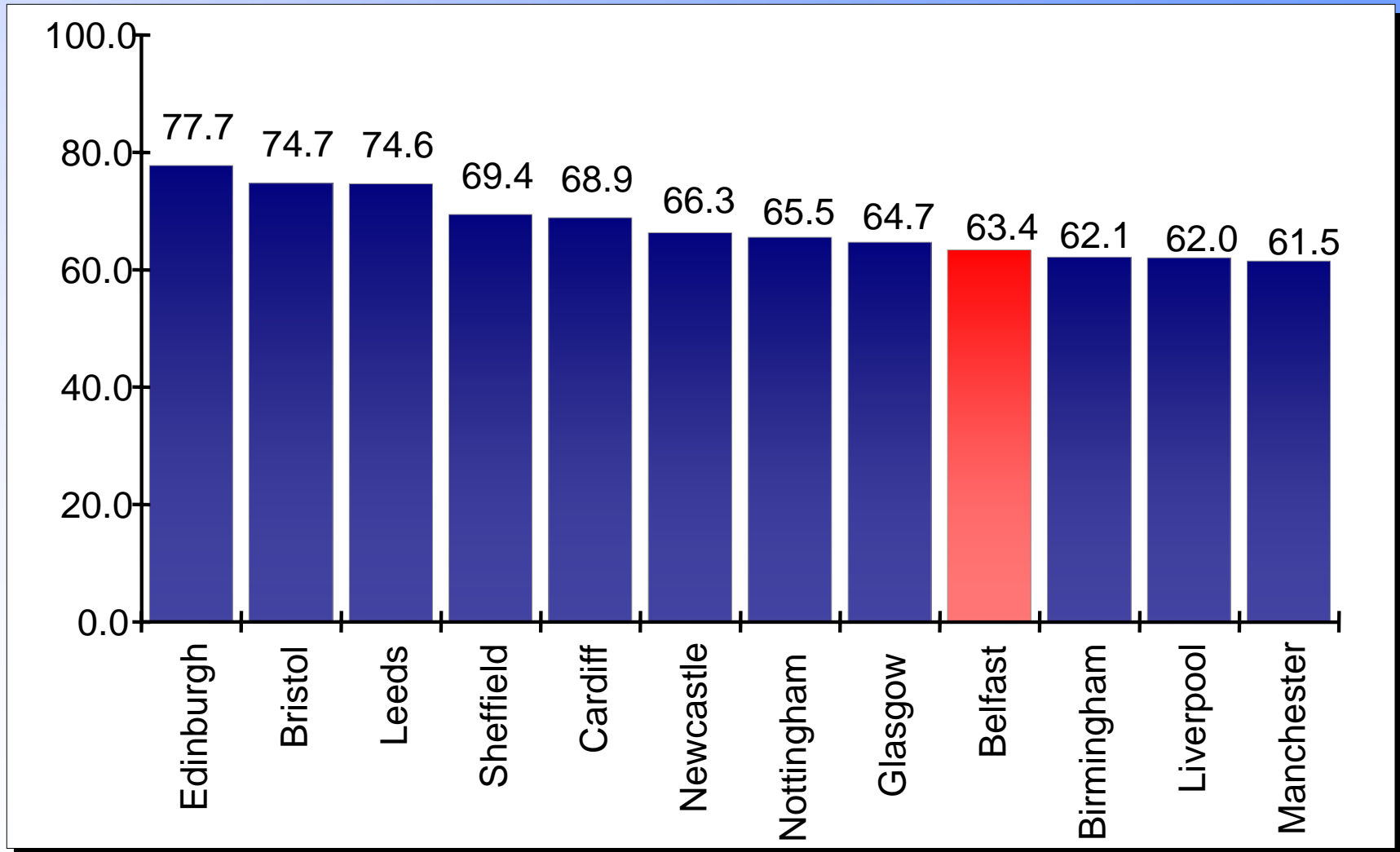


The Less Good News

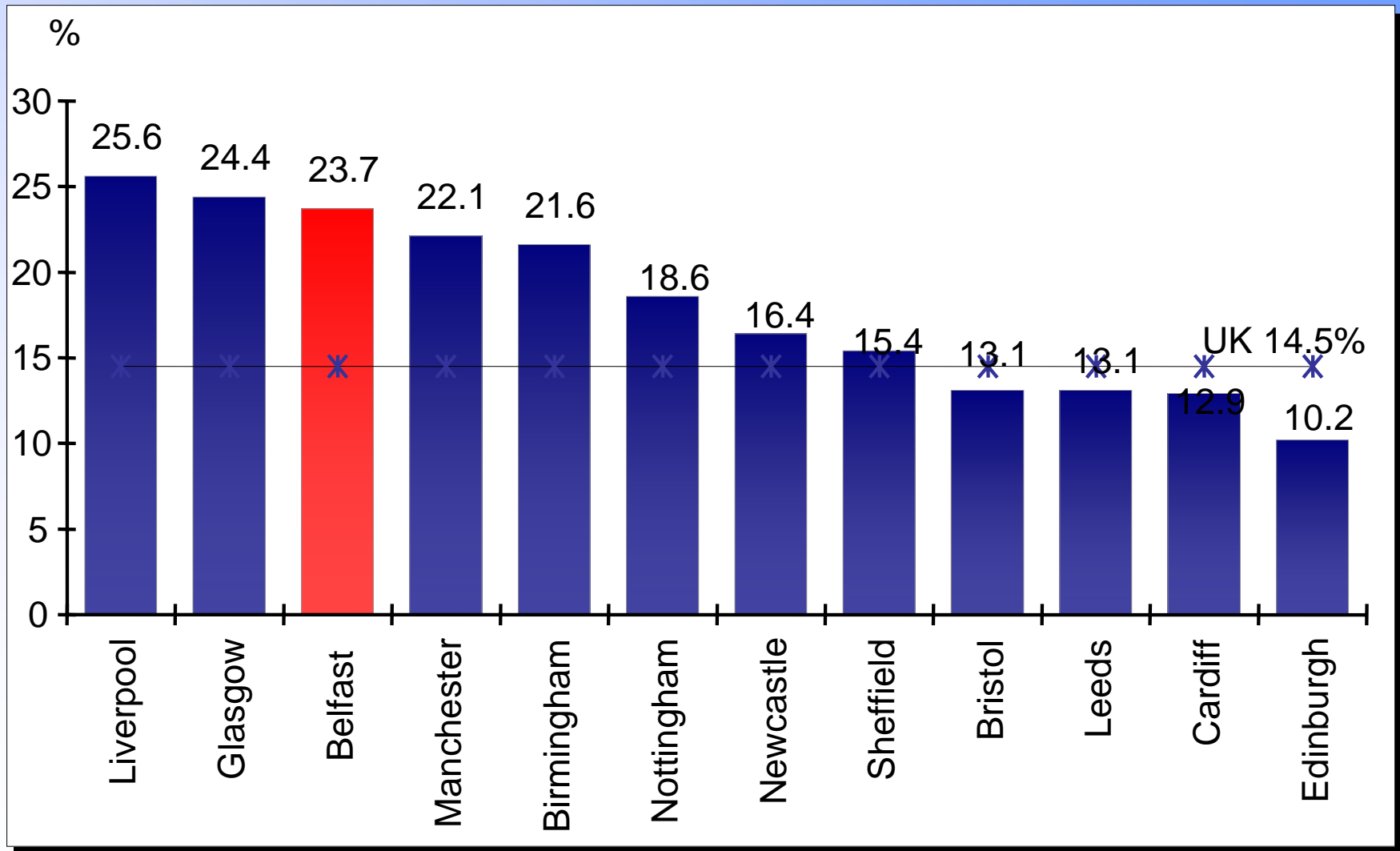
16-59 Population 2005



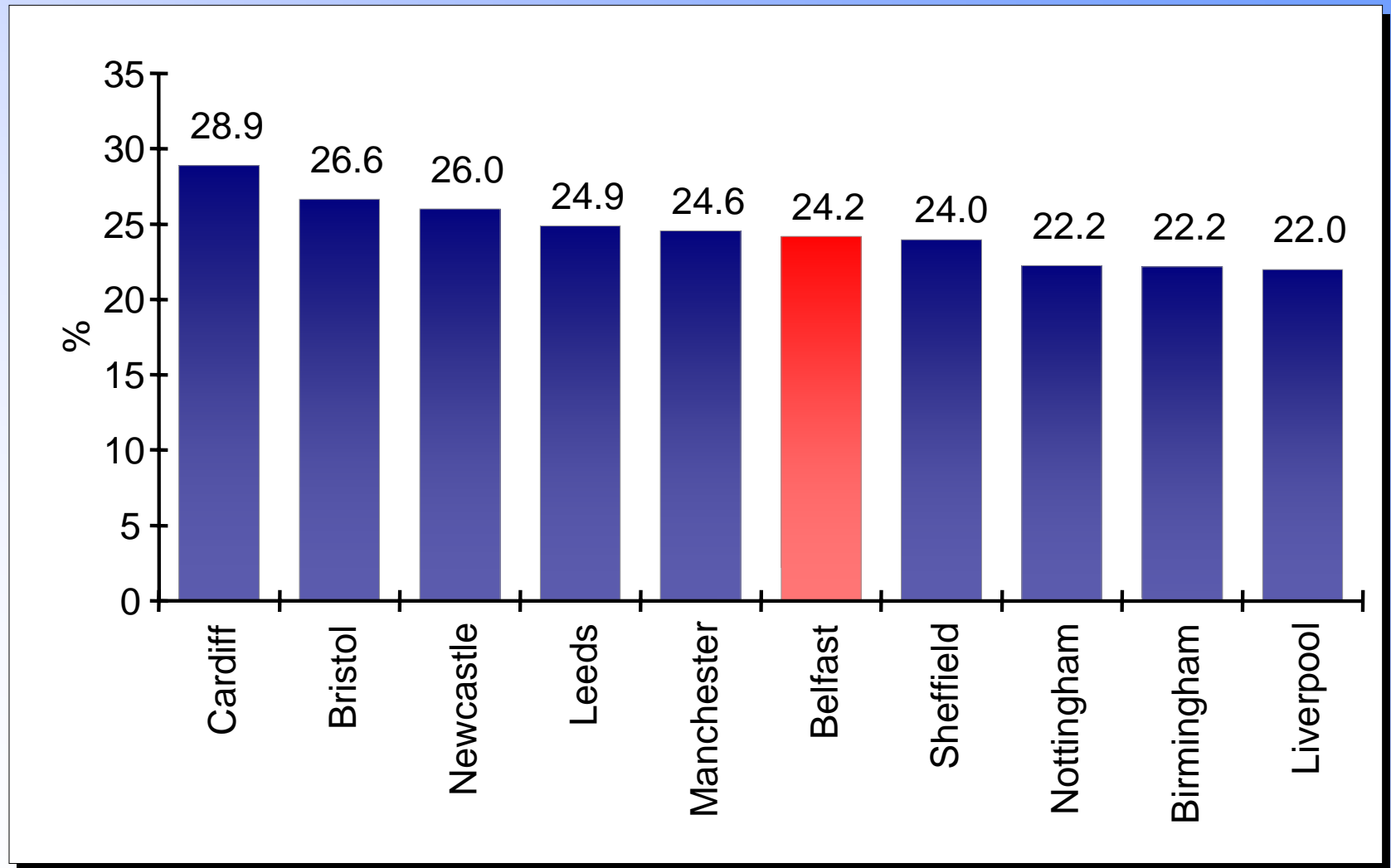
Employment rates 2005-06



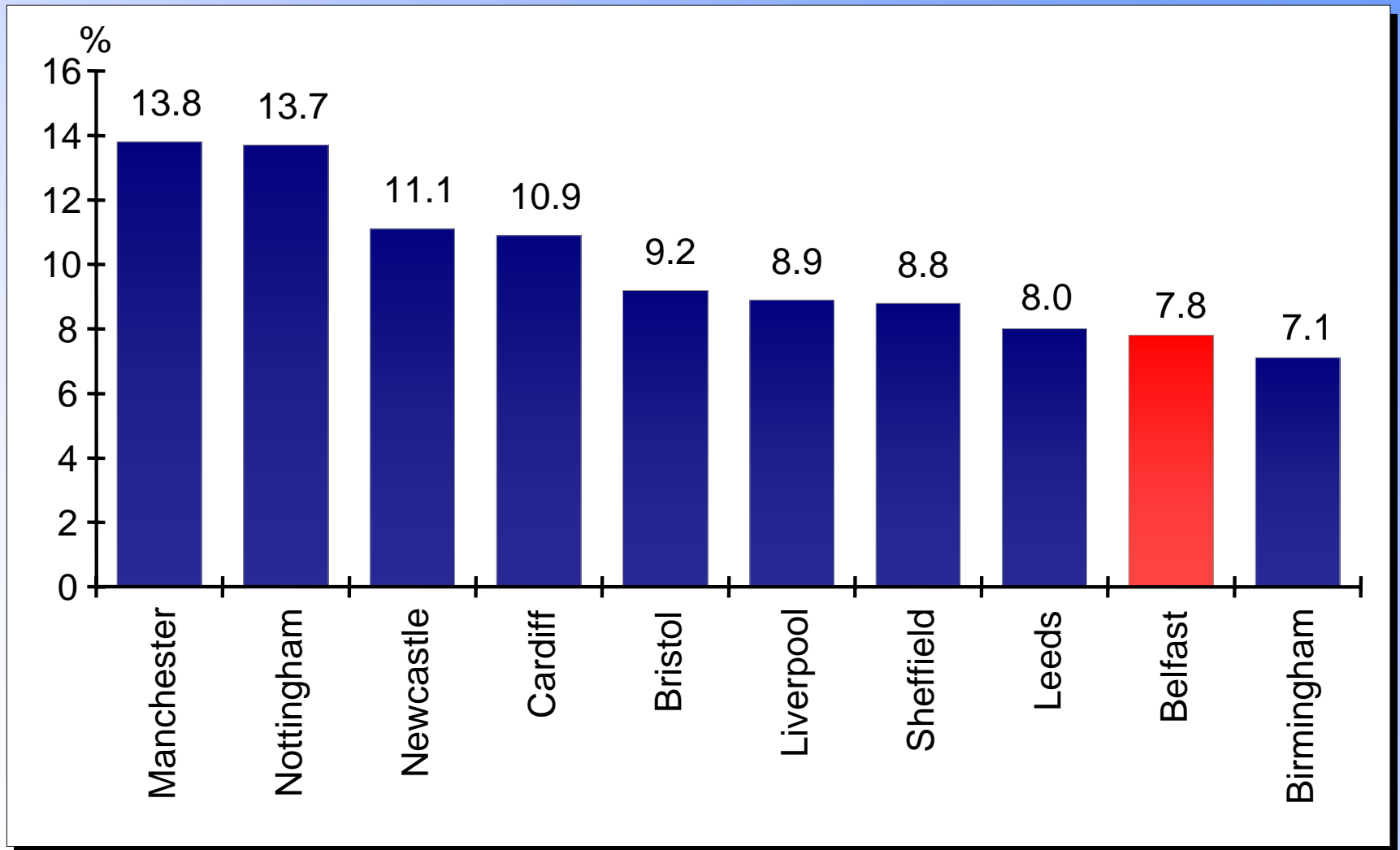
No qualifications 2005



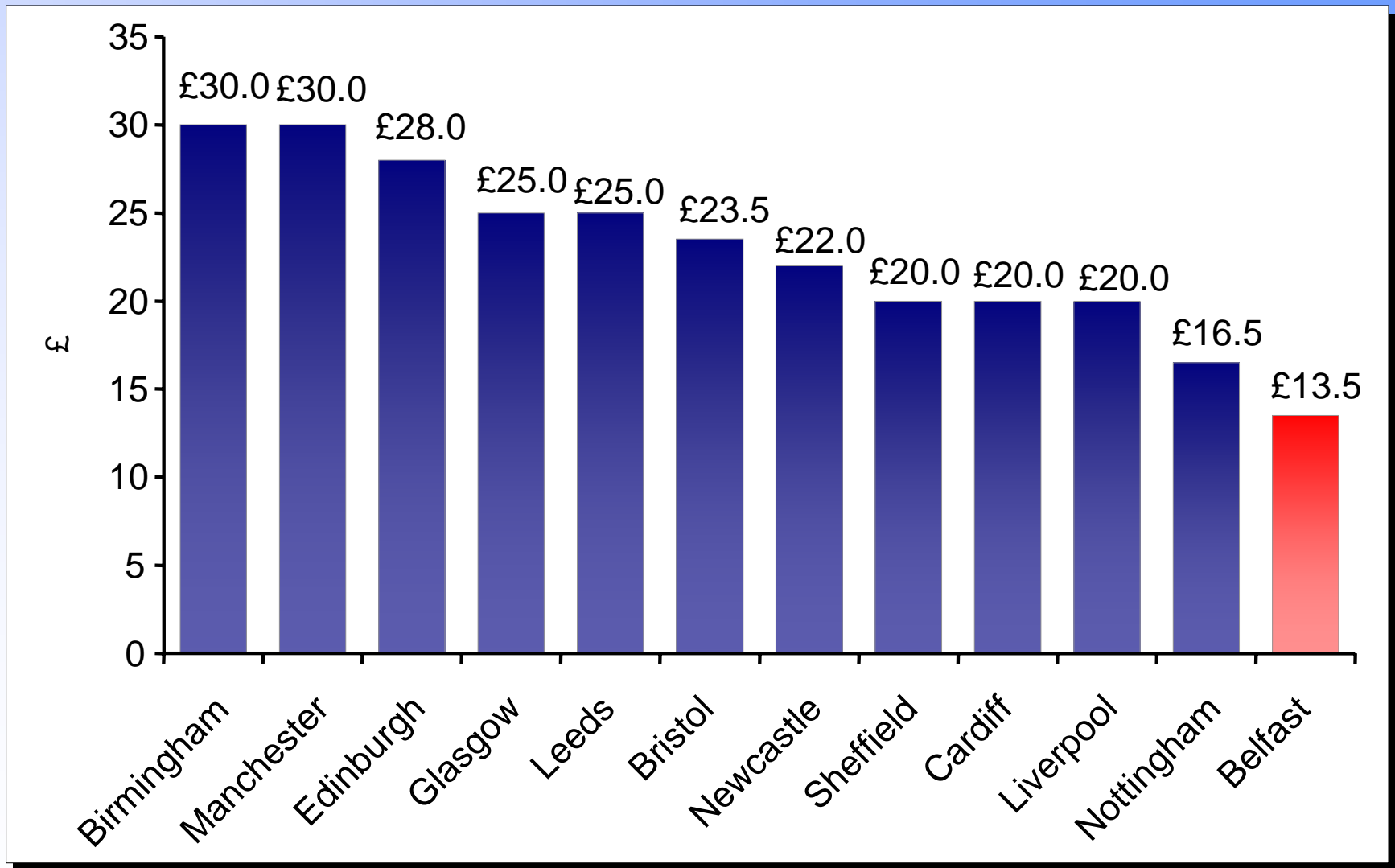
Managerial & professional occupations 2001



Full-time students 2001



Prime office rents 2006



Best UK cities to locate a business in 2006

City	Rank 2006	Score 2006
London	1	0.91
Birmingham	2	0.65
Manchester	3	0.59
Leeds	4	0.42
Bristol	5	0.27
Sheffield	6	0.27
Glasgow	7	0.27
Newcastle upon Tyne	8	0.22
Nottingham	9	0.21
Liverpool	10	0.20
Edinburgh	11	0.18
Cardiff	12	0.17
Reading	13	0.16
Belfast	14	0.07

Best city in terms of...

	Belfast's Ranked Position 2006
. . . easy access to markets	14
. . . ease of recruiting qualified staff	14
. . . external transport links	14
. . . international transport links	9
. . . cost of staff	5
. . . availability of financial incentives	1
. . . value for money of office space	9
. . . availability of office space	12
. . . internal transport	14
. . . availability and cost of car parking facilities	4
. . . quality of life for employees	14
. . . availability of retailing and leisure facilities	13
. . . freedom from pollution	4
. . . lively city environment	13

4. HOW'S SYSTEM COPING?

A system in the making

- Changing way govern affairs
- Changing way do business
- Changing way see each other
- State building, city building, community building, capacity building
- Huge ask

Asset base

Compared best or Republic - weak

- Public sector too big
- Entrepreneurialism too low
- Infrastructure not good enough
- Universities not sufficiently engaged
- Connectivity not good enough
- Skills gaps too big

Do you have a story?

- Big picture future NI & Belfast?
- Can system make place competitive?
- Clear priorities - business services, ICT, biotech, financial services?
- Simple common goals?
- Massive investment – not led by political squeal?
- Grown-up conversation?

Relationships

- Too many government departments – slows down, limits coherence
- No alignment strategies
- Central local still tense
- Business, middle-class engagement politics limited
- Local government/community tensions
- Community relations – work to do

Political Culture

- Control divided not govern united, dynamic society
- Risk averse culture
- More political less administrative leadership
- Let go
- More political maturity

Belfast's bigger role

- Contribution NI not recognised
- BMAP but no metropolitan capacity
- City region divided
- RPA did not help
- More work needed

Challenges Regional Assembly

Great – but

- Constitution and security to delivery
- Aligning and choosing
- Shaping departments
- Planning - resources and philosophy
- Taking powers local or letting go?
- Taking people from local?

Challenges local government

- Advocacy to leadership
- Special to public interest
- Huge ask modernisation
- Community planning – Ghandi and Western civilisation
- Commitment, capacity, cooperation, cash, leadership, time

Challenges RPA

- Already unfinished business
- Now up in air - or long grass
- Missed opportunity local government
- Too many small, weak, poor places?
- Time be brave and bold

5. WHAT'S NEXT FOR BELFAST?

What's going on?

- Booming, confident, splashing cash
- Massive investment retail, leisure, housing
- Titanic Quarter, Victoria Square more to come
- Huge physical progress
- Wider economy more challenges
- Renaissance to competitiveness?

Why?

- Cities are back
- Public investment UK Europe
- Overheated south
- Sort relations & corporation tax
- All may change
- Not in 'Last Chance Saloon'
- But don't waste it

Challenges despite progress

- Beyond city centre management
- No big picture
- No clear stewardship – Laganside
- Quality, authenticity, linkages
- Titanic to Crumlyn to north foreshore
- Connecting places, projects, people
- Delivery

Can you deliver?

- UK exploring delivery vehicles
- City Development Companies
- Sheffield, Liverpool, Birmingham, Manchester looking – your peers
- Derry got similar
- OECD review Laganside proposed

- I suggested it then
- Challenge central and local
- But that's changing
- Unripeness time - wait RPA
- But RPA long grass

Is it desirable?

- Shape quality, future of city
- Belfast mainstream not minority
- Pulls together partners, policies, priorities
- Complements not clutter RPA
- Innovative models governance
- Build on in future

Is it desirable?

- Reinforces community planning
- Getting on until RPA out long grass
- Investors see 'can do' place
- Actions as well as words
- Delivery, delivery, delivery

Is it possible?

- Fantastically exciting times
- Brave new world
- YOUR world
- Are you brave and bold?
- I suspect you will be

SO AS MY LITTLE LOCAL BAND
THE BEATLES SANG
'DON'T LET ME DOWN!'