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Rebuilding the Shankill
Place and Community



Working Paper 2 | Rebuilding the asset base



2022

Investment Impact
A research report by BUILD with
Queen's Communities and Place
QCAP



COMMUNITIES
AND PLACE

Table of contents

TABLE OF CONTENTS.....	2
TABLE OF TABLES AND FIGURES	3
CONTEXT.....	4
EXECUTIVE OVERVIEW.....	5
SECTION 1 INTRODUCTION	6
RESEARCH OBJECTIVES	6
POLICY CONTEXT	6
STRUCTURE OF THE REPORT	8
SECTION 2 DEMOGRAPHIC CHANGE AND TENURE.....	9
DEMOGRAPHIC CONTEXT	9
HOUSEHOLD TYPE AND FUTURE DEMAND	11
THE PRIVATE RENTED SECTOR.....	12
PRIVATE SECTOR DEVELOPMENTS.....	13
SECTION 3 SITES STRUCTURE AND YIELD	15
URBAN CAPACITY AND YIELD ANALYSIS.....	15
DENSITY STANDARDS AND ESTIMATES OF YIELD	16
SITE ANALYSIS.....	17
SOCIO-ECONOMIC PROFILE OF THE SITES	19
PHASING AND BUILD RATE.....	21
SECTION 4 IMPLICATIONS AND RECOMMENDATIONS	25
RECOMMENDATION 1 UNLOCKING THE POTENTIAL	25
RECOMMENDATION 2 MONITORING, ACTION AND APPRAISAL.....	28
RECOMMENDATION 3 THE POTENTIAL OF A COMPREHENSIVE DEVELOPMENT SCHEME	28
RECOMMENDATION 4 COMMUNITY LED HOUSING	28
RECOMMENDATION 5 REGENERATION IMPLEMENTATION PROGRAMME.....	30
SECTION 5 REFERENCES AND SOURCES	31

Table of tables and figures

TABLE 1 GROWTH SCENARIOS FOR HOUSING IN BELFAST 2035.....	7
TABLE 2 IMPLIED SIZE OF HOUSING REQUIRED 2014-35	11
TABLE 3 RENT LEVEL BY POSTCODE IN BELFAST.....	13
TABLE 4 SPECULATIVE HOUSING DEVELOPMENTS IN THE SHANKILL HOUSING MARKET.....	14
TABLE 5 HOUSING CAPACITY FORECAST IN THE BELFAST DEVELOPMENT PLAN	15
TABLE 6 HOUSING MONITOR, LAND AND UNIT AVAILABILITY	16
TABLE 7 DENSITY OF RESIDENTIAL DEVELOPMENT	16
TABLE 8 SUMMARY OF URBAN CAPACITY AND POPULATION FORECAST	18
TABLE 9 AVERAGE HOUSEHOLD SIZE	18
TABLE 10 VARIANCE EXPLAINED IN COMPONENT STRUCTURE	19
TABLE 11 CLUSTER ANALYSIS OF SITE TYPES IN THE GREATER SHANKILL LAND MARKET	20
TABLE 12 YIELD CAPACITY AND BUILD RATE.....	23
TABLE 13 OUTLINE FIRST YEAR IMPLEMENTATION FRAMEWORK.....	27
TABLE 14 OUTLINE IMPLEMENTATION FRAMEWORK CLH SCHEME	30
FIGURE 1 POPULATION CHANGE IN THE SHANKILL NRA 2001-20	9
FIGURE 2 POPULATION CHANGE BY AGE IN THE SHANKILL NRA 2001-20	10
FIGURE 3 POPULATION DENSITY IN THE SHANKILL NRA.....	10
FIGURE 4 PROJECTED HOUSEHOLD CHANGE 2014-2035	11
FIGURE 5 SITE STRUCTURE AND DISTRIBUTION	17
FIGURE 6 STRUCTURE OF THE SITE CLUSTERS.....	20
FIGURE 7 SPATIAL DISTRIBUTION OF CLUSTERS	21
FIGURE 8 NEW DWELLING STARTS IN NORTHERN IRELAND 2021	22
FIGURE 9 POPULATION AND HOUSEHOLD ESTIMATES IN THE SHANKILL NRA 2012-19	23

Context

This Working Paper sets out an analysis of development sites, potential yield and implications for population change in the Shankill. The BUILD Group acknowledge the generous and professional support of a range of organisations including Belfast City Council Planning Department and their dataset on sites, yields and planning guidance. The Housing Executive and the Department for Communities have provided detailed site information, spatial analysis and practical advice on the potential for development across the land they own. Ulster University [Research on Property and Planning Unit](#) also provided valuable small area data on house prices in the Greater Shankill.

The analysis presented here is led, conducted, evaluated and used by the community and the BUILD Working Group in particular. The Working Papers are about building the case for urgent action, providing the rationale for policy intervention and setting out the physical assets on which the long-term development of the Shankill can be based.

- **Working Paper 1 The Policy Case for Regeneration** explains why this work needs to be prioritised and how a range of policies, programmes and strategies all commit to developing the Shankill, its housing base and bringing in resources to manage integrated growth. The paper makes the point that this now needs action to deliver the repopulation of the community.
- **Working Paper 2 Rebuilding the Asset Base** sets out the priorities for taking this agenda forward, where the barriers and risks are and what the implications for supply and people from a progressive, housing-led regeneration approach.
- **Working Paper 3 Assets and Opportunities** is a practical response to the analysis by describing the opportunities for development, planning history and the practical implications of building out the sites. This integrated suite of resources is a professional, evidence based and local approach in which local people have taken responsibility for building a new community.

BUILD WORKING GROUP
NORTHERN IRELAND ALTERNATIVES

Executive overview

- After decades of decline, the population of the Shankill has been growing in a sustained way. Between 2012 and 2020 **the population increased** by 5.15% compared with an increase of 3.94% for Northern Ireland as a whole. There has also been an increase in younger cohorts and at the same time a decline in older people, which is helping to grow the population base.
- **Private speculative development** schemes have worked across the inner, mid and outer Shankill housing markets with active first-time buyer demand as well as a strong re-sale market across the area. Co-ownership is strong across the new build sector but schemes of varying scales, have achieved sustainable prices, including in the 3 and 4-bedroom stock.
- There are **42.23 hectares available across 57 sites** in the Greater Shankill area. This suggests that the Shankill can deliver 2,781 new units taking into account commitments on Housing Executive sites and mean density standards applying to different sites (corridor, inner-city, outer city and so on).
- It is estimated that these unit projections could support a **population capacity of 5,590 people** in the best estimate calculation.
- The strategy for **development needs to acknowledge different market conditions** and here a range of instruments and area-based interventions will be required to bring sites forward for development.
- The scale of sites and **build rate also needs to be factored into local planning**, with a realistic market approach taken to the volume, phasing and integration of scheme release, given historic build rates and conditions in the wider urban housing market.
- The development of sites will require an **integrated and long-term strategy** involving the public, private and community sectors. There is a need for a **programme of marketing, scheme design and clustering** to build investor awareness and focus on particular sites. The work that has gone into the asset register needs to continue with delivery **monitored on a site-by-site basis** to ensure that schemes comply with community needs in terms of size, mix, tenure structure and quality of design. The approach is about building viable, vibrant and high-quality communities.
- The potential of a **comprehensive development scheme** in the lower Shankill should be evaluated along with DfC, elected representatives and community stakeholders. A **community led housing scheme** could also be tested, especially in the inner-city where barriers to development are strongest; and whilst implementation is important, there is a need for a **locally led regeneration programme** within which housing renewal can be sustained in the long term.

Section 1 Introduction

Working Paper 1 sets the policy and site context for the identification and mapping of development sites in the Greater Shankill area. It highlighted a long list of potential sites that the BUILD Working Group systematically evaluated to prioritise schemes with a realistic chance of development. Sites with planning constraints, ownership or contaminant issues, prior designations or which had commenced were omitted through a partnership process involving statutory agencies, the private sector and the community. This Working Paper provides an analysis of the market context, structure of the sites and the implications for redeveloping the area.

Research objectives

The objectives of this Working Paper are:

1. To build on the policy analysis in Working Paper 1 by emphasising the need to deliver on commitments to rebuild the Shankill as a place and a community;
2. To set the sociodemographic and housing market context in the Greater Shankill area;
3. To explore dynamics in the local housing market and how they impact on opportunities for development;
4. To define the final list of sites for development and their structure across the Greater Shankill Area;
5. To explore the implications for unit yield, population growth and phasing; and
6. To set out the implications for rebuilding the housing stock, population and long term socio-economic and demographic sustainability of the area.

Policy context

Working Paper 1 provides a full description of the policy context for housing and redevelopment and in particular the need to regenerate brownfield and inner-city areas, provide more affordable housing and strengthen the mix of supply, especially in areas with site capacity. The Greater Shankill represents a significant asset in driving the sustainable regeneration of the city, achieving brownfield targets and creating the population needed to build a strong economy, jobs and public services. Strategic planning policy, the development plan and design guides encourage precisely the type of densification needed in this part of Belfast. At a strategic level:

- The [Regional Development Strategy for Northern Ireland 2035](#) (RDS) emphasises the importance of the Belfast city region and places an emphasis on brownfield development at the expense of greenfield growth; more compact and better served communities; and more sustainable communities better served by public transport and which encourages walking and cycling.
- [Planning Policy Statement 7 Quality Residential Environments PPS7](#) needs to be considered together with the advice contained in associated Supplementary Planning Guidance, including *Creating Places and Living Places* aimed at achieving attractive and sustainable neighbourhoods through better design.

- [Planning Policy Statement 12 Housing in Settlements](#) emphasises the importance of the *Urban Capacity Study*, which is needed to inform housing allocations in the Local Development Plan and assist in reaching a target set by the RDS that 60% of new housing should be located in *appropriate brownfield sites* within the urban footprints of settlements greater than 5,000 population.

The Council’s [Belfast Agenda Community Plan](#) also sets out the ambition of a compact city that is socially, economically and demographically sustainable. The table below shows three options for the city and the need to look at low and high growth options, which have implications for where and how housing is provided through the Development Plan. Ultimately, the *Community Plan* aims for 46,000 additional jobs and an additional 66,000 people, leading to a city of more than 400,000 people by 2035. But the Community Plan also emphasises that such development needs to tackle poverty and spatial deprivation aiming at a 33% reduction in the life expectancy gap between the most and least deprived neighbourhoods; and every young person leaving school has a destination that fulfils their potential. It is not a case of population or jobs growth but placing both in a wider regeneration framework that addresses fundamental inequalities in the Shankill.

Table 1 Growth scenarios for housing in Belfast 2035

Supply	Scenario 1 Adjusted demographic growth	Scenario 2 Supporting baseline employment growth	Scenario 3 Supporting higher employment growth
Additional residents	19,000	66,000	89,000
Additional homes needed	17,000	37,000	47,800
Additional jobs supported	-	46,000	69,000

Source: Belfast City Council (2018a).

This is taken forward in the *Local Development Plan* (BCC, 2018a) that shows that this growth will need approximately 31,600 new homes over the plan period and that the majority of new units will be located within the Belfast City settlement area. Again, the Shankill represents a major resource in achieving these targets but this should be implemented in a way that meets the needs of local people and builds neighbourhoods that reflect the identity of a range of communities living in the area.

The Greater Shankill Partnership (GSP) [Greater Shankill Strategic Regeneration Framework](#) also prioritises repopulating the area to build the economy, the viability of schools, services and commercial footfall and to improve the environment pointing out that:

Establishing a more sustainable Greater Shankill community will therefore be critically linked to successfully reversing population decline. An increased population would in turn result in increased economic activity levels and support of services and amenities (page 39).

It makes the point that density, a more balanced housing mix and diversifying the tenure base is critical in the planning and design process. The GSP is also responsible for the

[Neighbourhood Renewal Partnership](#) which takes its lead from the *Greater Shankill Community Convention*, designed to give the community a voice in the development of the area. The *Neighbourhood Renewal Plan* emphasises the need for early intervention to support children, young people and facilities, especially in education and work. Enabling, attracting and retaining people, especially young families in the Shankill is pivotal in supporting the housing strategy, the types of dwellings that is provided and the type of environment including services and facilities that can build a better life for the community.

Structure of the report

The BUILD project represents an attempt to take these strategies forward in a practical and sustainable way by identifying capacity within the Greater Shankill; identifying opportunities for development; and demonstrating how the area is a significant asset in increasing the population living in the urban footprint. Section 2 sets the demographic and housing market context as a basis for the description of the sites and their yield and demographic impact in Section 4. This also makes the point that there needs to be a carefully planned and integrated approach to phasing the development of the sites identified in the analysis. Section 5 sets out the implications for delivering *actions* to rebuild the Greater Shankill and how the public, private and community sectors need to work together to deliver a sustainable development programme.

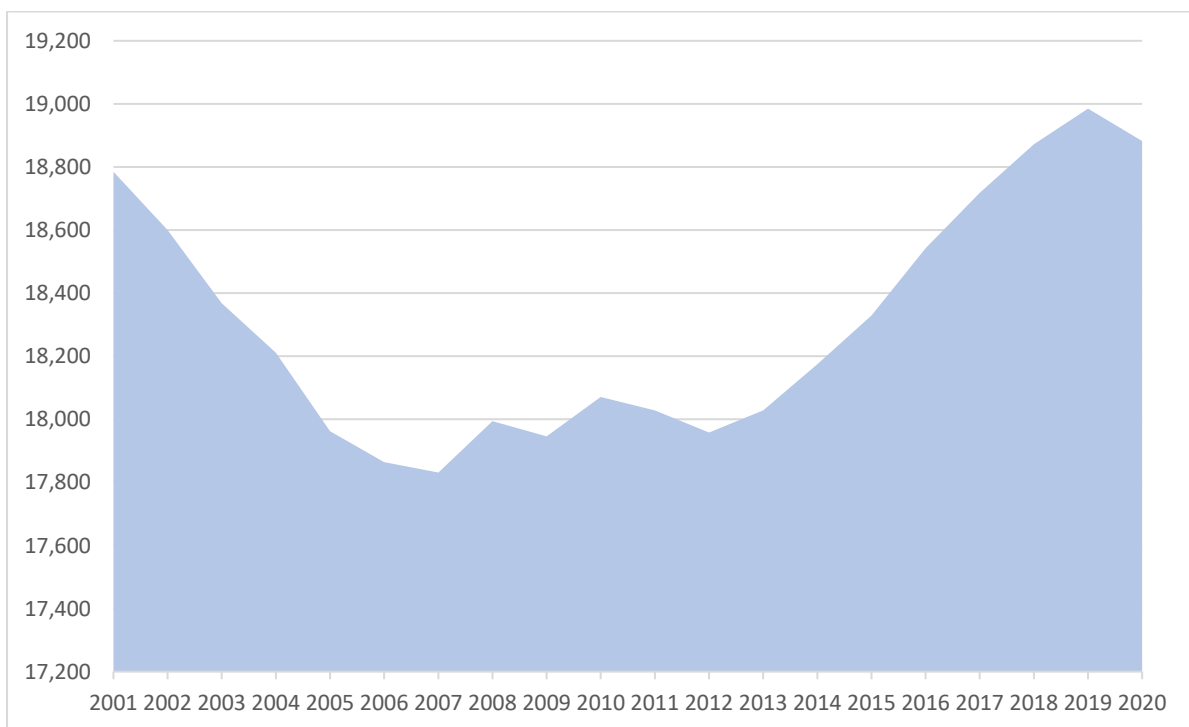
Section 2 Demographic change and tenure

This section sets out the demographic context of the Greater Shankill and makes the point that the population has been growing and restructuring with an increase in younger cohorts and a reduction in older age groups. It also looks at the structure of housing need and challenges across tenures in building out the identified sites. Here, the analysis shows a degree of private and public market failure and the need for a range of responses to deal with the long-term and systemic barriers to housing-led regeneration.

Demographic context

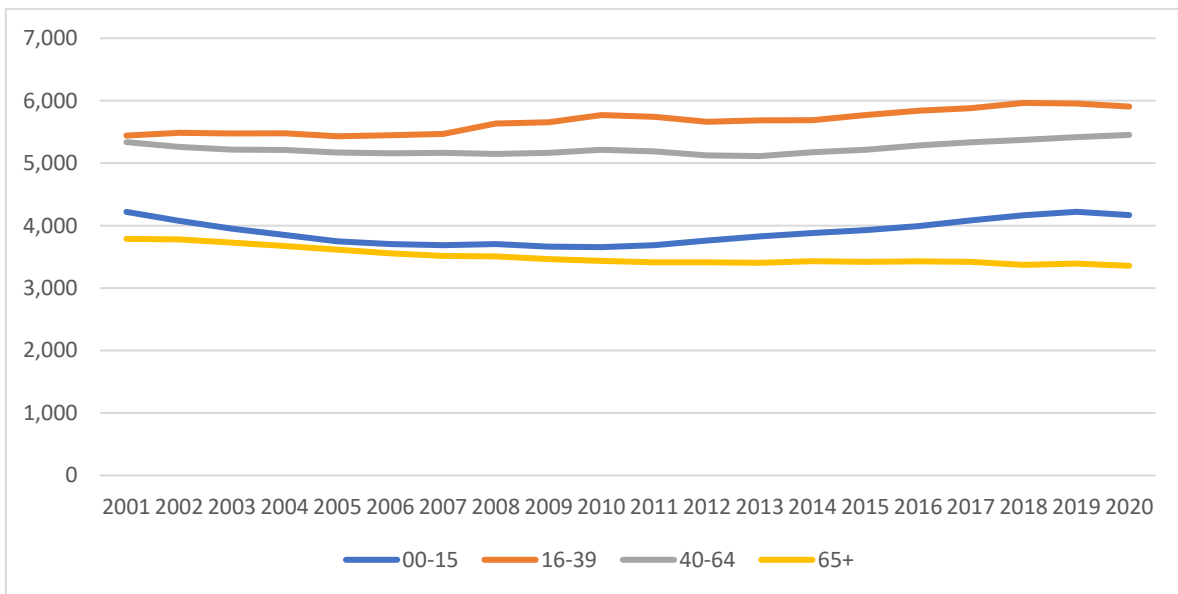
Population change in the Shankill Neighbourhood Renewal Area between 2001 and 2020 is shown in the diagram below and it is important to note that there has been sustained growth over the last 10 years. Indeed, between 2012 and 2020, the population of the Shankill increased by 5.15% compared with an increase of 3.94% for Northern Ireland as a whole.

Figure 1 Population change in the Shankill NRA 2001-20



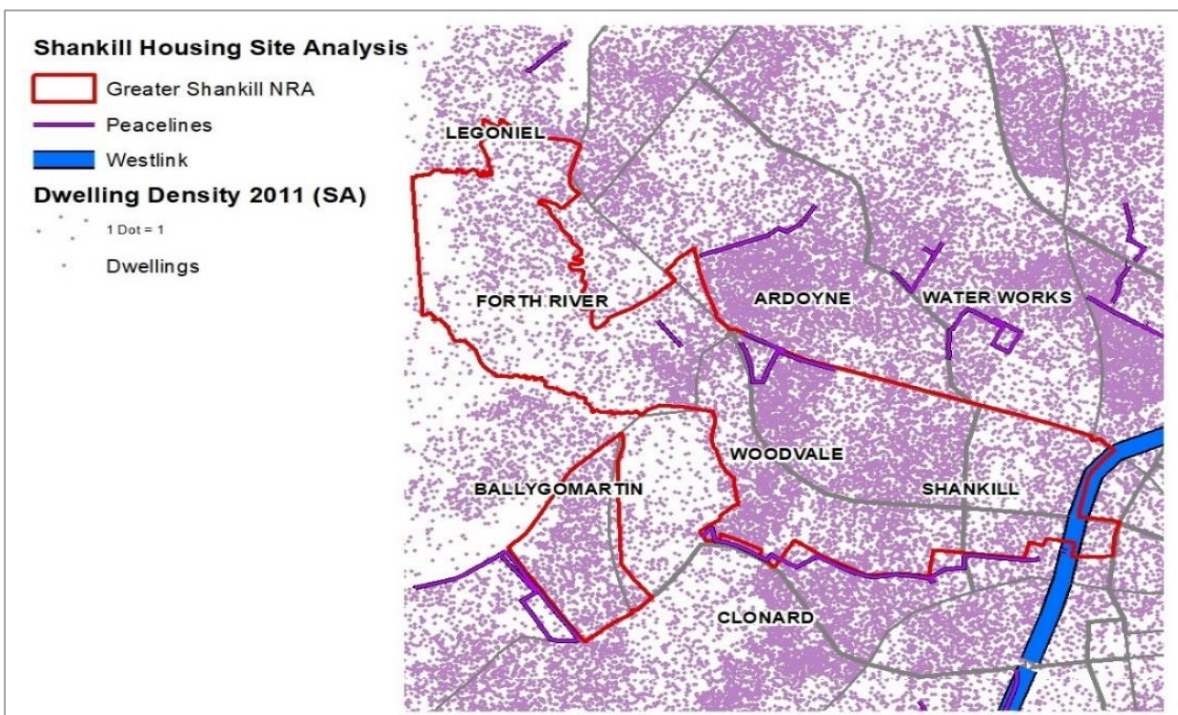
The figure below shows that the *components of change* are vital in sustaining growth, despite a decline in the last year of data. There has been a sustained increase in the younger cohorts at 0-15 and 16-39. At the same time, the numbers aged 65 and over declined, indicating that the ageing of the population has been arrested. The proportion of people aged over-65 declined by 11.4% whilst the number aged 16-39 increased by 8.6% since 2001 and this emphasises the need for a housing mix that will attract a balanced demographic with potential for stronger indigenous growth.

Figure 2 Population change by age in the Shankill NRA 2001-20



But the legacy of these demographic trends is formidable. Redevelopment, the roads programme and the Troubles hollowed out the Shankill since the 1960s and the failure of *deck access* urban renewal further accelerated the decline. The labour market has also changed and the heavy engineering and primary industries that provided manual work for the city has effectively gone and especially from the lower Shankill. This is a long-term structural process reflected in the diagram below that shows that housing density is a challenge in repopulating the area. It also emphasises the need to focus on the type and density of development rather than getting *any* project on such sites.

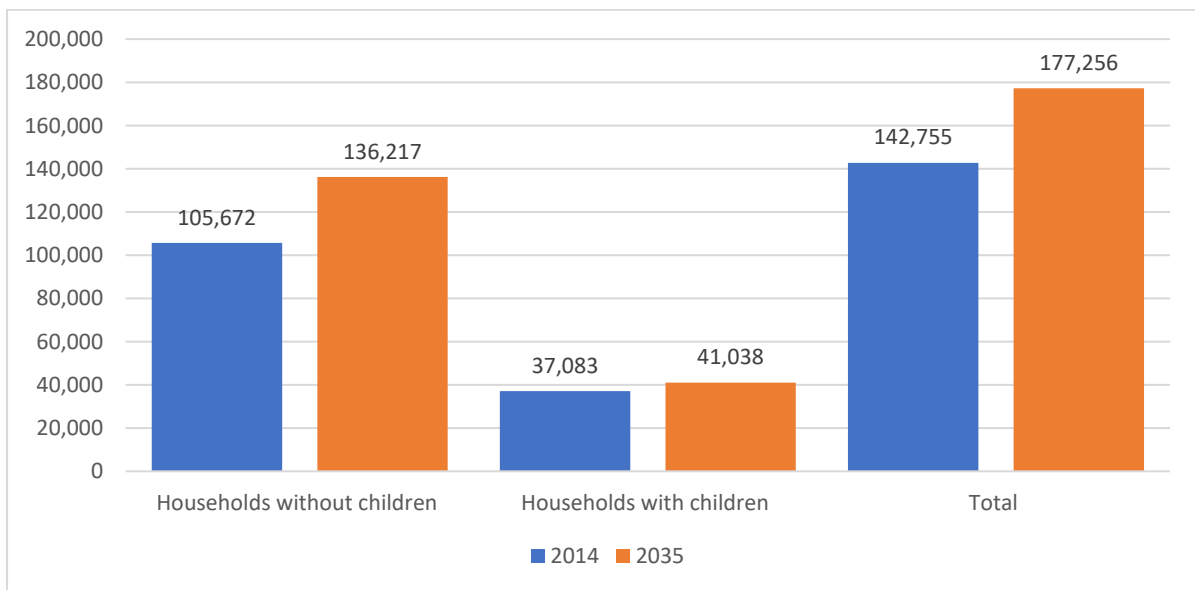
Figure 3 Population density in the Shankill NRA



Household type and future demand

The diagram below is based on projections of households as part of the Development Plan and shows the relationship between population growth and household structure. Most demand is likely to come from 1 and 2 adults, which will account for 71.2% (+24,546) of household units but as the BUILD group have emphasised, it be important to attract a balanced demographic (with supply for families, single people, older people and supported housing). It should be emphasised that in 2035, 42,648 people will be in households with children and there is an appetite for such housing in the Shankill as noted below. It is critical that the urgency to develop does not compromise design standards and the need for *quality residential* developments.

Figure 4 projected household change 2014-2035



Based on Turley, 2017, p.12.

Linked to this, table 2 that shows that a mix of housing sizes are required, including family type accommodation to enable the housing market to operate effectively (downsizing new entrants and so on). It will, therefore, be important to ensure that densities and housing mix are carefully planned to create balanced growth across the Shankill.

Table 2 Implied size of housing required 2014-35

Type	Change	1 to 2 rooms	3 to 4 rooms	5 to 6 rooms	7+ rooms
1 person	11,819	845	5,541	4,517	917
2 persons	14,428	474	4,884	6,957	2,113
3 persons	6,197	117	1,408	3,524	1,148
4+ persons	2,056	19	221	1,156	660
Total	34,501	1,455	12,054	16,153	4,838
Percentage %	100%	4%	35%	47%	14%

Turley, 2017, p.19.

The private rented sector

Ulster University (2021) show that within the Belfast City Council Area, there were 3,700 private rented lettings in the first half of 2021, representing a 6.8% increase on the previous half year and the largest sample of lettings since the first half of 2017. The annual trend also records a significant increase in transactions, up 39.9% when compared to the same period in 2020. But the tenure is also becoming less affordable. Overall, the proportion of rents in Northern Ireland above £600 has increased to 58.1% in 2021, up from 52% in 2020 and highlights the degree of rent inflation over the period, which has likely to have been fuelled by the pent-up market demand and limited stock availability.

Postcode analysis, in the table below, shows that the Shankill (BT13) is affected by these trends and the rental market, especially for 1 and 2 bed accommodation is strong. The average monthly rent for Belfast as a whole in this analysis is £709 compared with £550 for BT13, but the sector is an important one, in understanding the dynamics of the market and the impact of new developments. The private rented sector has been growing, taking units out of private sale and creating an affordability barrier especially to low-income households.

The Housing Executive (NIHE, 2019) show that rent affordability affects Belfast in particular. They state that if the ratio of rent to income exceeds 25%, it is considered that a local authority area has affordability issues in terms of tenants' ability to pay monthly rents. In Belfast, the affordability gap has remained stable, but as the housing market recovers and as investor appetite strengthens, such tenures have potentially exclusive effects on local demand. The problem for the Shankill is that this is potentially out-pricing local people and especially those not in work or in poorly paid employment.

The Housing Executive (NIHE, 2020) also show that 76% of landlords in Northern Ireland owned one or two rental properties and market intelligence suggest that most of the supply in the Shankill is by small scale (less than 5) local investors. However, there is a risk that new developments will be spot purchased or block built by landlords; that student housing is always a possibility given proximity to the Ulster University campus; and that Airbnb is growing, including into neighbourhoods proximate to the city centre.





Table 3 Rent level by Postcode in Belfast

Postcode	1 Bed	2 Bed	3 Bed	4+ Bed	ALL
BT1	£828	£849	£972	*	£854
BT2	£744	£806	£1,274	*	£859
BT3	£636	£860	*	*	£838
BT4	£620	£651	£704	£1,211	£697
BT5	£531	£618	£739	£968	£666
BT6	£557	£638	£731	£988	£674
BT7	£578	£773	£822	£1,192	£933
BT8	£535	£640	£803	£924	£723
BT9	£600	£758	£937	£1,218	£907
BT10	*	£731	£849	*	£761
BT11	*	£627	£687	£678	£646
BT12	£563	£607	£612	£778	£619
BT13	£504	£553	£542	*	£550
BT14	£522	£545	£607	£679	£574
BT15	£463	£564	£657	£905	£591
BT16	*	£654	£683	*	£687
BT17	*	£640	£733	*	£669
BT18	£1,036	£797	£965	£1,699	£943
BT19	£688	£757	£1,074	*	£754
BT20	£438	£602	£750	£961	£649
BT23	£516	£588	£678	£945	£647
BT26	*	£670	£830	£1,176	£826
BT27	*	£562	£649	£949	£621
BT28	£459	£638	£691	£943	£676
BT36	*	£594	£632	*	£620
BT37	*	£544	£604	*	£602
BT38	£447	£529	£609	£708	£566

Private sector developments

The strength of the private rented market shows sustainable interest – both supply and demand – in the Shankill housing market. As noted, there have been significant developments of mixed use and types, including substantial speculative family housing that has worked effectively and sustainably in the lower Shankill. Table 4 shows that recent schemes across the inner, mid and outer Shankill housing markets are well developed with active first-time buyer demand as well as a strong re-sale market across the area. Co-ownership is strong across the new build sector but schemes of varying scales, have achieved sustainable prices, especially in the 3 and 4-bedroom stock.

Table 4 Speculative housing developments in the Shankill housing market

Zone	Development	Scheme
Inner	<ol style="list-style-type: none"> 1. Gardner Square (Brown Square) 2. 9 Brown Square (Brown Square) 3. Lesley Central (Shankill Road / Craven Street) 	<p>Gardner Square at development phase and now complete and fully occupied</p> 
Mid (Tudor)	<ol style="list-style-type: none"> 4. Ambleside Court (Silvo Street/ Matchet Street/ Ambleside Street) 5. Tudor Phase 2a (Silvo Street; Sydney Street West/ Snugville Street/ Upper Charleville Street/ Upper Glenfarne Street) 6. Tudor Phase 2b (Silvo Street/ Baden Powell Street/ Snugville Street/ Sydney Street West) 7. 2 Danube Street (Tudor Phase) 8. 3-9 McCandless Street (Tudor Phase) 9. 240-246 Crumlin Road (Tudor Phase) 	<p>Property re-selling at £130,000-£140,000 in Tudor, mid-Shankill</p> 
Mid	<ol style="list-style-type: none"> 10. 9-13 Northumberland Street (Northumberland Street/ Shankill Road) 11. Silver Birch Court (Northumberland Street) 12. 12-42 Cupar Way 13. Seventh Square (Lawnbrook Avenue) 14. Thirty-Eight North (Lawnbrook Avenue) 15. Mayo Park (Ainsworth Avenue) 16. Yew Street (Cambria Street) 17. Cliftonpark Avenue/ Oldpark Road (Oldpark Road) 	<p>Silver Birch housing scheme in Northumberland Street</p> 
Outer	<ol style="list-style-type: none"> 18. 123-127 Ballygomartin Road (Ballygomartin Road) 19. Altnagarron Mews (Forthriver) 20. Fernhill Heights (Forthriver) 21. West Circular Close (West Circular Close) 22. Westway Hill (Ballygomartin Road) 23. Forthbrook Court (Ballygomartin Road) 24. Health Lodge (Ballygomartin Road) 25. Lyndhurst Crescent (Ballygomartin Road) 26. Highgrove Meadows (Ballygomartin Road) 	<p>Strong market in family housing in Lyndhurst, Ballygomartin Road</p> 

Section 3 Sites structure and yield

This section looks at the yield from each site, the potential demographic effects and implications for phasing developments. It is important to set the analysis of the Shankill within the wider structure of the housing market, how the land economy functions and how urban capacity is understood in planning terms. The section first examines the Urban Capacity Study (UCS) and the Technical Supplement to the Local Development Plan as well as the internal structure of the Shankill housing market and how it is connected to the wider urban area.

Urban capacity and yield analysis

The headline figures in the UCS are set out in the *Technical Supplement on Housing* (BCC, 2018b) presented in the table below. The city centre has capacity to achieve over 10,000 units, with an overall yield of 28,684. This assumes that mixed use sites will all be built out with 100% housing, but the planners take a more realistic 70/30 ratio of housing to employment on mixed use sites. The Technical Supplement suggests that applying a 70/30 ratio across the city overall gives a total yield of 27,163 units. Adding windfall, small and sites from outside the urban footprint the figures above together give a potential yield of over 31,200 units. Thus, the Plan objective HOU1 of 31,660 units would require an average per annum build of 2,110 units. The historic rate has been below this target and the Technical Supplement suggests that it will only be met in 2022-2023, requiring significant above average completions to the end of the Plan period. Clearly, given the right conditions, there is an opportunity for the Shankill to take advantage of this growing market.

Table 5 Housing capacity forecast in the Belfast Development Plan

Area	Housing (units)				
	Committed sites (a)	New sites		Total	
		Housing sites (b)	Housing/ employment sites (c)	Just housing sites (a+b)	All (100%) housing (a+b+c)
City centre	5,280	431	4,538	5,711	10,249
Titanic Quarter	2,637			2,637	2,637
Inner city	2,008	944	372	3,002	3,374
Wider city	4,997	2,095	48	7,092	7,140
Arterial routes	2,807	1,034	110	3,841	3,951
Strategic centres	1,269	64	0	1,333	1,333
Whole city	18,998	4,618	5,068	23,616	28,684

Source: Belfast City Council, 2018b, p.25.

This trend is to some extent reflected in the table below. The Housing Monitor updates progress on units completed and the implications for land availability. The available potential dwelling units for Belfast City sits at 21,669, but this also emphasises the need for BUILD to monitor build rates and land availability over time. It also raises the issue of phasing and build rate given the scale of sites available for development in the Shankill against achieved levels for the city as a whole.

Table 6 Housing Monitor, land and unit availability

Settlement / Area	Area developed (Hectares)		Units completed		Available potential (Hectares)	Available potential (dwelling units)
	01.04.19 31.03.20	01.04.15 31.03.20	01.04.19 31.03.20	01.04.15 31.03.20		
Urban footprint	10.4	67.0	532	2,916	324.2	20,270
Units within the urban footprint %	-	-	76.4%	84.9%	-	93.5%
Greenfield	7.9	26.1	164	517	53.0	1,399
Belfast city	18.3	93.1	696	3,433	377.2	21,669

Source: BCC, 2021, p.2.

Density standards and estimates of yield

Table 7 shows the density standards across the city and the Shankill contains a mix of arterial routes, commercial nodes, inner-city and suburban locations so that different rates apply in assessing the potential yield from the area. The Development Plan is itself based on an analysis of densities, size and yield which have been used in this Working Paper (BCC, 2017). However, as noted earlier these are a guide to development rather than a target number and site conditions and planning context will determine the actual design and mix of any individual scheme.

Table 7 Density of residential development

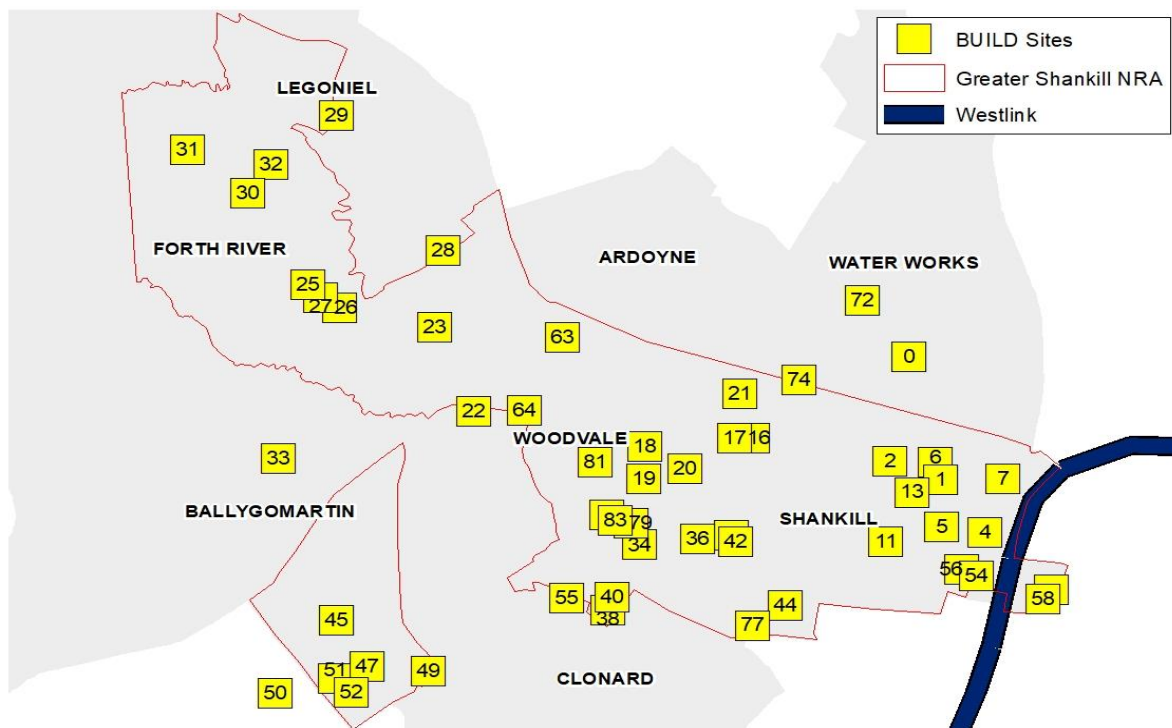
Settlement character area	Average density band (dwellings per ha)	Locational criteria
Tall buildings within the city centre	>350	Locations to be identified
Belfast city centre	150-350	Within the defined city centre boundary
Inner city Belfast	75-150	As defined within the settlement strategy
Outer Belfast	25-125	Remainder of Belfast city between inner city Belfast and the settlement development limit
District centres	100-200	Within 200m of a district centre
Local centres	75-150	Within 100m of a local centre
City corridor	100-175 within inner city	50m either side of a designated corridor
Rail stations and halts	50-150 within outer Belfast	Within 100m of a rail station or halt
Small settlements	25-50	Within the settlement development limits of the small settlements

Source BCC, 2018a p.66.

Site analysis

Figure 5 shows the distribution of the sites mapped by the BUILD team using data from a range of sources including the Department for Communities and the Housing Executive. (Reference numbers relate to the original index by the Housing Executive and enables a degree of cross reference with potential development areas). It should be emphasised that yield figures in the UCS are estimates only and the Plan points out that more detailed site appraisals will be required to determine potential yields at local policies and planning application stage. Each of the 57 sites was given a designation based on table 7, such as corridor, inner city, outer city and so on, depending on site characteristics.

Figure 5 Site structure and distribution



The land supply in figure 5 is summarised in table 8 below, which shows that there is 42.23 hectares available across the mapped sites and the Local Development Plan yield estimates that these sites will produce 3,701 units using mean densities, with a range of 1,758 to 5,643 depending on the metric used from table 7. The Housing Executive have provided guide unit totals on the sites that it owns, which have been used to calculate the best estimate in blue. This suggests that the Shankill can deliver 2,781 new units which is likely to create an additional population of around 5,600 people with a range of between 1,758 and 3701 units (if all sites are built for residential and to capacity).

Table 8 Summary of urban capacity and population forecast

Variable	Units
BUILD sites identified	57
Hectares (HAs)	42.23 hectares
Unit yield in BUILD data set	
Low yield (based on table 7)	1,758 units
High yield	5,643 units
Mean yield	3,701 units
Mean yield with known NIHE densities	2,781 units
Estimated population by unit build scenario	
Low population estimate	3,534 people
High population estimate	11,343 people
Mean population estimate	7,439 people
Mean (NIHE densities) population estimate	5,590 people

The population analysis is based on the average household size in the area as indicated in table 9. It shows the Average Household Size for the Shankill SOAs at 2.01, with a low Standard Deviation, indicating a standardised average for the area. Using this estimate, the population in the mean density scenario is 3,701, but depending on density, site availability and demographic composition could rise to 11,343. As noted, using actual density data for sites the Housing Executive own, the likely population is around 5,590 people. Such a repopulation, even at the lower figure, would clearly make a significant impact on the social, commercial, environmental and cultural fabric of the area. Clearly, achieving a higher average household size would require more family housing, although at lower densities and increasing the population needs to examine the relationship between household mix; housing type; and the density at which schemes are built. It should be noted that average household size for Northern Ireland as a whole has been declining, for example, from 3.70 in 1971 to 2.44 and this is now a broad demographic trend across all areas of the region.

Table 9 Average Household Size

Super Output Area	Average Household Size 2011
Shankill 1	2.12
Shankill 2	1.90
Crumlin 1	1.85
Crumlin 2	2.18
Woodvale 1	1.98
Woodvale 2	1.97
Woodvale 3	1.92
Glencairn 2	2.14
Average	2.01
Standard Deviation	0.12
Median	1.98

Socio-economic profile of the sites

Working Paper 3 and the interactive dataset describes the sites with more detailed statistical analysis available on the socio-economic, demographic, environmental and housing standards for each one. This level of data enables a more detailed analysis of the structure of the market and it is important to see the sites within the context of specific sub-markets rather than the Shankill as a unitary area. Principal Component Analysis is a synthetic statistical technique that summarises a large array of data (gathered at SOA) for a range of variables, each with different frequencies, to define the key factors (or components) that explain the structure, in this case, of the land market. This was carried out on the longer list of sites before a small number of deletions (mainly coming onstream for development) were made and is designed to provide an overview of the complexity of the Shankill housing market rather than a description of particular sites. (This first process of site identification is set out in Working Paper 1).

It should be emphasised that this is not about creating specific sub-markets but rather about understanding the different structure of the sites and how their development produces different regeneration outcomes. Investment opportunities in a type 1 site is different than in a type 2 or 3 site. Three factors emerge, as set out in the table below and they explain 84% of the variance (which is a high level). The table below sets out the variables selected including population change, house price data (from the Zoopla data base supplemented with Ulster University statistics) and housing tenure. It also looks at housing and environmental conditions to construct a wider analysis of the market and how this is distributed: SOA Population Change 2001 – 2020; Owner occupied: Total; Social rented: Total; Private rented: Total; Living Environment Domain Rank; Proportion of domestic dwellings in a state of disrepair (Rank); Housing Quality Sub-Domain (Rank); Housing Access Sub-Domain (Rank); Proportion of domestic dwellings that are unfit (Rank); and Proportion of domestic dwellings without (1) modern boiler, or (2) loft insulation and double glazing (Rank).

Table 10 Variance explained in component structure

Total Variance Explained						
Component	Initial Eigenvalues			Extraction Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	5.493	54.933	54.933	5.493	54.933	54.933
2	1.936	19.356	74.288	1.936	19.356	74.288
3	.951	9.505	83.793	.951	9.505	83.793
4	.845	8.446	92.239			
5	.369	3.693	95.933			
6	.283	2.830	98.762			
7	.079	.786	99.548			
8	.028	.279	99.827			
9	.017	.169	99.997			
10	.000	.003	100.000			

Extraction Method: Principal Component Analysis.

It is then possible to evaluate this distribution by subjecting the factor scores for each site to Cluster Analysis that categorises the area also into three types as set out in the table below

(noting that this was for the long list of 71 sites). Again, it is important to emphasise that these are not subdivisions of the Shankill market, but rather they indicate different *site clusters* with different opportunities and constraints from a developer perspective.

Table 11 Cluster analysis of site types in the Greater Shankill land market







Matrix	Cluster	Cluster 2	Cluster 3
Factor 1	+0.86	-0.23	-1.26
Factor 2	-0.48	+1.02	-0.70
Factor 3	+0.09	-0.58	+0.74
Number	30	25	16
Percentage	42.3%	35.2%	22.5%

Smallest cluster 16 (22.5%); Ratio of sizes, largest to smallest cluster +1.88.

The three clusters (see figure 6) can be broadly summarised as:

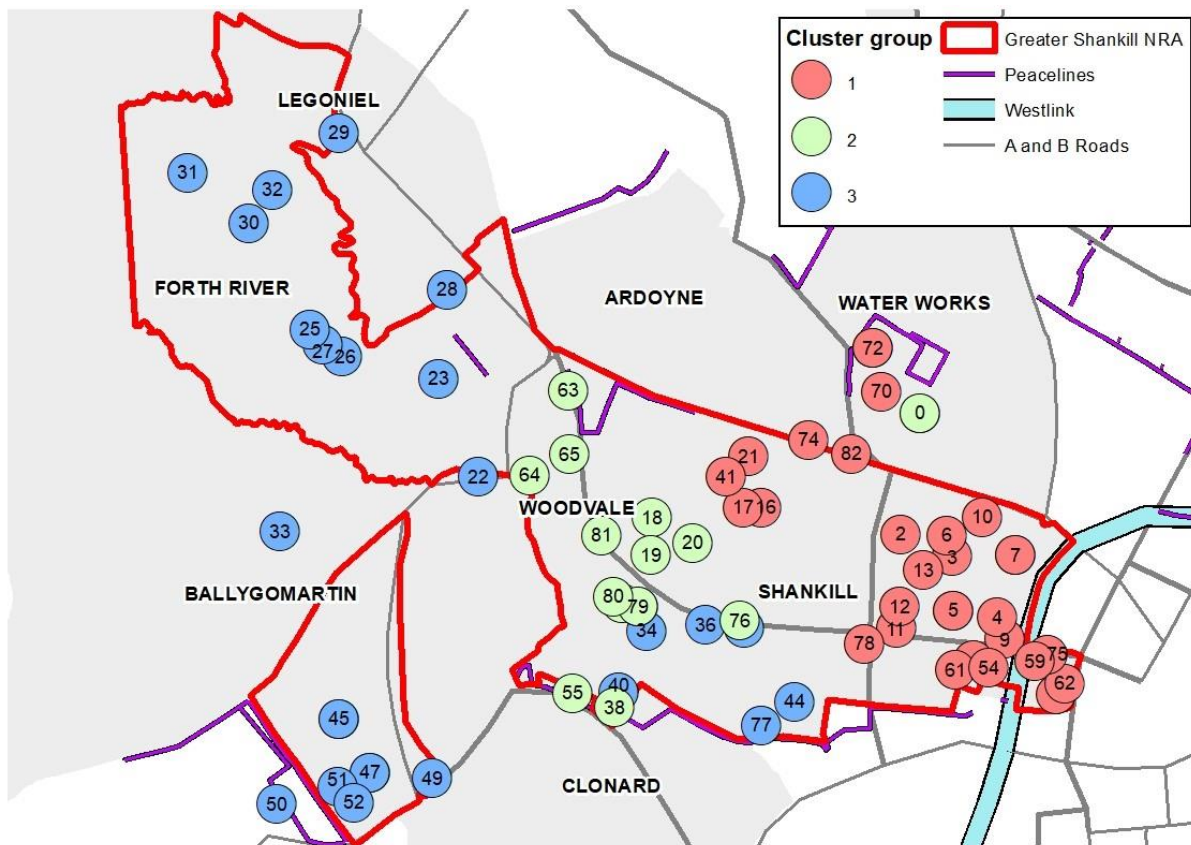
- Cluster 1 is characterised by population increase that is primarily associated with new social housing developments, in good condition although not necessarily with an attractive external environment.
- Cluster 2 has experienced slight population decline (since 2001) has good access to services but often poor housing standards, especially in the older owner-occupied stock. This has the lowest house prices and cuts across inner- and mid-Shankill although with a slightly higher density and site size than cluster 1.
- Cluster 3 has seen population growth but also evidence of conversion of older owner-occupied stock to private renting, where there appear to be pockets of disrepair and substandard conditions. However, the sites are bigger and prices are higher than in other markets.

Figure 6 Structure of the site clusters

VARIABLE	Cluster 1	Cluster 2	Cluster 3
 <small>Mainly social housing but with population growth. Disrepair connected with older housing stock. Monolithic tenure and small site capacity affect development options.</small>		<small>Slight population decline with tenure restructuring but owner occupation resilient. Good access to services and centrality to arterial routes.</small>	<small>Highest values and largest sites, generally in suburban locations. Evidence of owner occupation moving to private renting with a growing speculative rental market.</small>
 Average price £	£98,335	£81,014	£103,418
 SOA population	2461	1736	1837
 Population change	358	-62	-27
 Density	42.45	67.45	45.55
 Site of site	.3279	.6400	3.279

These clusters are mapped in figure 7 and clearly, they are overlapping categories *rather than tightly defined market sectors*. However, it does show that we can broadly differentiate between: a cluster in the inner city and along the arterial route; a second cluster stretching across the mid-and upper Shankill; and a suburban profile that importantly extends into the mid-Shankill. This underscores the complexity (and overlap) of the Shankill housing market and the need to develop particular approaches (density, housing mix, tenure and so on) across each site. In suburban areas where sites and prices are stronger, the private sector is likely to lead, especially on larger scale developments. In the mid and inner-city, mixed-use sites including commercial-residential on the arterial routes might make schemes viable; whilst on more complex sites, instruments such as deficit grant or community models could be an option.

Figure 7 Spatial distribution of clusters



Phasing and build rate

It is also important to set out the implications of delivering units across sites and over time. As the extract from Housing Policy (HOU 1) in the Development Plan makes clear, a sequential approach to site development will be important to ensure a sustainable approach to renewal.

HOU1 includes indicative annual rates of housing delivery which will assist in promoting the sustainable management of waste and the efficient use of water resources over the plan period.

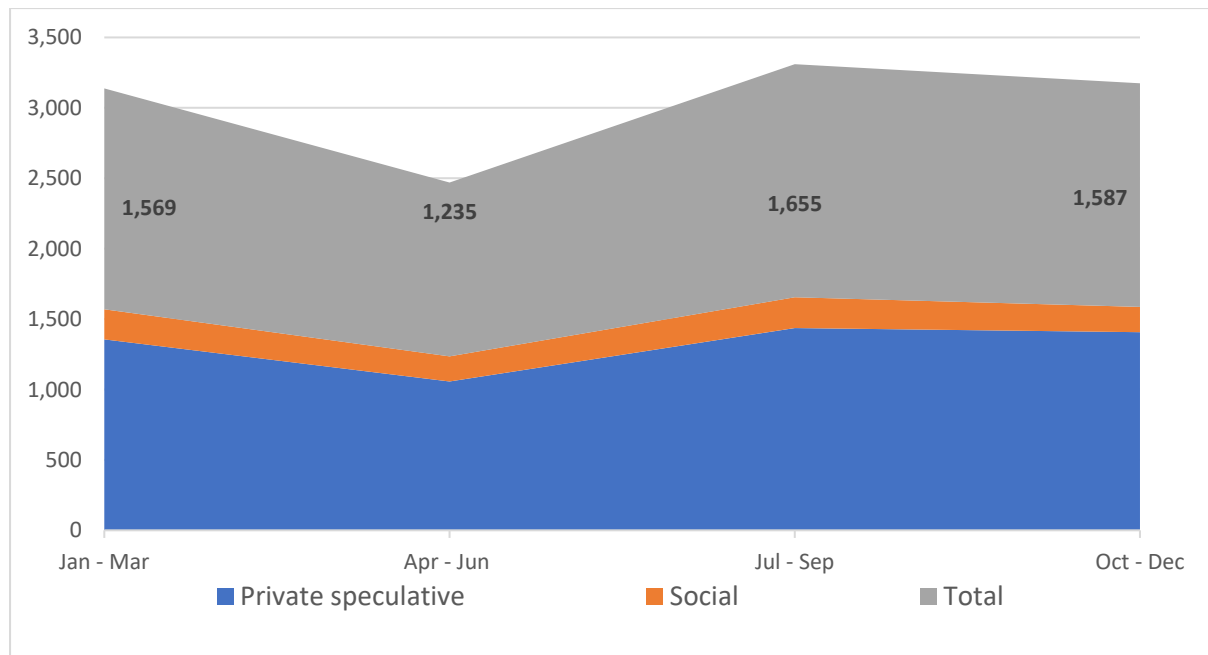
Importantly, it is also consistent with the ‘plan, monitor and manage’ approach of the SPPS and is particularly important in the context of a growing population and existing infrastructure constraints that must be carefully managed (Source: Belfast City Council, 2018b, p.23).

It is therefore important to understand the volume of build estimated (if all sites are built to capacity) in the context of the city:

- Population of Belfast=342,600¹;
- Shankill housing market area=29,243;
- Percentage 8.5% of the Shankill to the total;
- Shankill Neighbourhood Renewal Area=18,882 [5.5% of the city population]

Figure 8 shows that the total new starts in Northern Ireland was 6,046 units²; and the total new starts in Belfast was 797 units and the build rate in Belfast as a whole has been below the per annum target to reach the overall Development Plan target.

Figure 8 New dwelling starts in Northern Ireland 2021



The objective as we noted was for Belfast to have an additional 66,000 people by 2035 and we know that the Shankill has a capacity for 5,590 people taking the best estimate (see table 8). The build rate for Belfast in 2021 was 797 and although it is projected to grow, the table below shows that the base case (mean densities with known NIHE allocation) annual build would be 40% of the current per annum units and 29% pure mean density case. It is questionable whether it is feasible to build at capacity over the Plan period and some prioritisation is needed to ensure the project is delivered in an efficient and sustainable way. This does not mean that any site suitable for residential development is in some way excluded from release. If there is a demand from the private, public and community sector then the site should, of

¹ <https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/MYE20-Factsheets.pdf>

² <https://www.finance-ni.gov.uk/publications/new-dwelling-statistics>

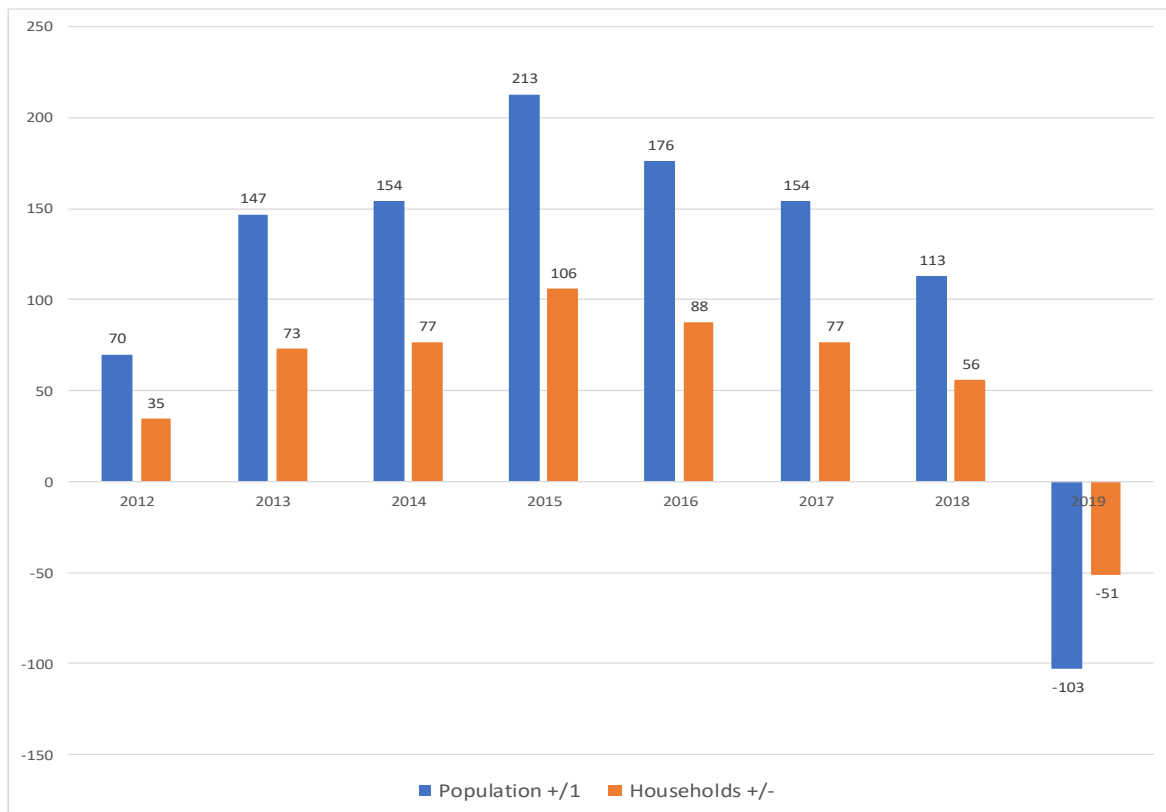
course, be brought forward for scheme design, where this is viable. Worked up schemes on some of these sites could show what is possible in helping to kick start such a process and this is highlighted in the recommendations.

Table 12 Yield capacity and build rate

Variable	Mean units (with NIHE)	Mean units
Yield	2,781	3,701
Per annum build (12 year)	322	208
Build as % of Belfast 2035	40%	26%

Figure 9 shows crude additional household units based on an average household size of 2.01, which gives an *indication* of current unit take up. It shows that if we take 2018, this was 56 in the Shankill Neighbourhood Renewal Area and whilst new households are not new build units, it does indicate a significant shortfall in the short-term (next 5 years) in particular. As noted, the *Housing Technical Supplement* projects an accelerated build rate for the city from 2022-23 to the end of the Plan period and it highlights both the potential and the challenge to attract new developments to the area.

Figure 9 Population and household estimates in the Shankill NRA 2012-19



Therefore, there needs to be a phased and realistic approach to the way in which sites are planned, released and developed and the time frame within which the yield capacity can be achieved given current and short-term market constraints. As growth accelerates and as sites elsewhere in the city are built out, the potential for growth in the Greater Shankill will also accelerate. But each site is different, they are in different market conditions and a range of

instruments will be needed to bring them forward. A programme of managed development is therefore needed to maximise new build options in the identified sites.

Section 4 Implications and recommendations

The analysis presented by the BUILD project shows the complexity of the land economy and the need for an integrated response involving the public, private and community sectors. There is, of course, the need for short term action and there is a well-placed frustration with aspirational plans and strategies. The data set on sites and the analysis that underpins it, is a significant resource that needs to be marketed in a variety of formats to bring private and public investment to a range of sites. There is also an opportunity for a community led housing approach to give local people a meaningful say in the design and development of their area; a more ambitious comprehensive development to address the structural problems of the lower Shankill; but also, the need to connect housing with a range of community priorities in regeneration work.

Recommendation 1 Unlocking the potential

The site audit and supporting analysis is a significant resource to unlock the potential of the Shankill and the work that has gone into the inventory, validating each site and thinking about how it could be 'sold' is the basis of a short-term, high impact marketing strategy. It would be useful to get advice from digital marketing specialists to see how best to use the data set online. The reach and penetration of such a campaign would be targeted and would include:

- A direct sell to local developers and builders across Northern Ireland;
- A targeted programme with estate agents in particular;
- A similar initiative aimed at architects, planning and property consultants as intermediaries;
- A targeted campaign with local housing associations, especially on a clustered basis. This might prioritise a subset of sites where there are feasible routes to development.

This would be supported with a standing marketing display in the Shankill, periodically opened with invitations to developers as well as statutory agencies and housing associations. However, it would be useful to plan out a well-integrated, phased approach focusing on different sites or clusters over a specific period, say 12 months. Again, guidance on a marketing strategy would help shape the programme. An initial high profile and broadly based multimedia campaign, led by BUILD, could set in train a programme of events. Then for each month(s) a different focus (on a particular area) could roll out, backed by publicity material on the site, the structure of the offer, link to supporting data on the BUILD website (based on Working Paper 3).

There is also potential for the BUILD group to commission their own scheme designs on sites with potential, say in partnership with a statutory owner. The scheme design could explore what is viable in each case, layout and quality, including density and housing mix and importantly, the opportunity to build a strong component of family housing, where this is also feasible. A limited number of such concepts would help to move the development process beyond simply advertising the site to show what is possible and commercially viable across the social rented, private and potentially community sectors.

The land, housing and commercial property market also needs to be monitored and progress on each site, mapped and updated. For example, there is a potential that site No. 53 may come on to the market and it is important that BUILD engage the owner and agent on the development (specification, design, planning proposals and so on). Similarly, new sites and buildings can also emerge onto the market and there is an opportunity to identify and propose these in any subsequent *Call for Sites* as part of the Local Development Plan process. The housing challenge in the Greater Shankill is clearly structural and a multi-element and longer term, more managed intervention will be required to deliver the ambitions of the BUILD group. This will include:

- a. Marketing and selling the asset base and the Greater Shankill as a place to invest in a range of housing options. As noted, this needs to be targeted and tailored to the key stakeholders including developers, building companies, estate agents, consultants, housing associations and representative groups such as the housebuilders federation. It also needs to use digital and social media marketing to capitalise the online BUILD asset register as well as physical displays, a brochure summarising the 'offer' and multimedia display such as video descriptions, drone and podcasts (which is in preparation).
- b. Targeted one-off sites with development potential where BUILD can work with the statutory owner (especially the Housing Executive and DfC) to bring forward a design brief, professional sales pitch and negotiations with social, private or community-based developers.
- c. Clustered schemes where small site agglomerations could be marketed jointly to achieve scale economies for developers.
- d. Concept proposal involving worked up designs for particular sites owned by other statutory agencies to stimulate their release onto the market.
- e. Monitoring planning applications and scheme design to evaluate their size, housing mix, tenure profile, community gain and design quality as a basis for consultation with the developer, work with local elected representatives, liaison with the Planning Committee, community awareness initiatives and if necessary, formal objections to application(s).
- f. Search and evaluate new opportunities for development especially around property/land combinations in former commercial and industrial sites, which will be important in the short term in any Call for Sites process as part of the Local Development Plan.
- g. Community-Led Housing (CLH) for consideration on small (<20 units) sites in statutory ownership and were Building Sustainable Communities, Housing Development Grant and nil/nominal value asset transfer is feasible.

The schedule below is outline and the BUILD Working Group can use the template to review the sites and prioritise action, but the point is about implementing a range of pathways to development in a way that protects community interests. It is also important that each site reflects different conditions in the Greater Shankill and aligns with the regeneration potential in each case. Sites in the inner-city are not the same as in suburban locations and different

instruments, tenures and forms of finance will be needed to ensure that schemes are viable. It should be emphasised that it is not implied that publicly owned sites are released for social housing exclusively and have, in the past, been used to stimulate private sector development. Nor are these phases preconditioned and if there is an appetite for development with viable schemes, it should not prevent the release of a particular site.

Table 13 Outline first year implementation framework

Mode of working	Actions and sample sites	Months from start
Marketing	<i>Festival of sites</i> : Physical display; targeted digital marketing; social media campaign.	Months 1-2 but revisited depending on build, gaps and potential over time to Month 12.
Single sites	Nos. 30, 31 and 31 with design team, brief and marketing initiative focused on a viable short list. Gradient is an issue but potential for infill (n=6) on No.31.	Months 2-6
Potential cluster proposals	Nos. 11 and 12. No 13 mixed tenure with Radius and co-ownership finance (25% affordable / 75% social). Potential for LOTS and regeneration of frontage.	Months 1-3
	Nos. 25, 26 and 27 with a potential yield of 10 units (could be CLH). No 25 gradients are a problem with n=20 units on the site.	Months 4-6
	Nos 47 and 48, small sites with n=8 units and potential for a design team to develop out the scheme.	Months 7-9
	Nos. 79, 80, 81 and 83, with potential for higher density development on the arterial route, including LOTS.	Months 10-12
Comprehensive Development Scheme	Nos 53, 54, 55 and 56 (with 53 likely to come on to the market in the short-term).	Months 3-4 for initial discussions with politicians and officials. Formal feasibility analysis Months 5-8 if viable and delivery post Month 12.
Monitoring	For example, No. 53 to ensure compliance with community needs (and access).	Month 1 but <i>scanning</i> as proposals come on stream to Month 12.
Community-Led Housing (CLH)	Small sites <20 in statutory ownership with potential on No.62 (BSC/HDG).	Month 3 with delivery body and feasibility study agreed, with potential for start by Month 12.

Recommendation 2 Monitoring, action and appraisal

It will be important to track progress on each site and to determine the impact of development on the local community. For example, the density, housing mix and design quality of schemes emphasise the need to avoid a *build at any price* approach. There may be a need to challenge planning applications, briefs and design schemes and connections could be made with the technical aid NGO *Community Places* to support such responses. New buildings and land will also come on stream or might be identified in advance and there will be opportunities in the *Call for Sites* to propose areas via the Development Plan.

Recommendation 3 The potential of a Comprehensive Development Scheme

The lower Shankill has a number of development challenges, constraints and significant opportunities. There is a patchwork of (private and public owned) sites; it is strategically close to the CBD; there have been some commercial and residential developments in the last decade; and the road itself is not the integrating feature it once was, not least in the need to strengthen walking, cycling and public transport. Sites are at various stages of development, with some potentially coming on to the market and others locked in private ownership, but it all emphasises the need for an overarching strategic framework to regenerate the area in a orderly and community led way. [Comprehensive Development Schemes](#) enable DfC to identify derelict or underused land and/or buildings to regenerate and can respond to requests from communities, politicians, developers and planners:

The scheme is planned in a comprehensive way, taking into account views of the public, councils and development or Masterplans for the areas. Once the site has been assembled it can be used by the public sector, other agencies or by the private sector with the goal of improving and regenerating the area. This may be done by way of a developers brief in which companies are asked to bring forward ideas for the development of the site.

The advantage of the Scheme is that it gives the community a degree of control in the planning brief, enables a mix of uses that reflects the needs of the area (including physical, social and economic relationships with the CBD) in a way that benefits the Shankill and most of all coordinates, clears and prepares infrastructure for a more ambitious regeneration vision. There are, of course, costs, time and logistic constraints to such an option, but it is one that could be explored with political representatives, City Council planners and the Department for Communities. (The potential for a local neighbourhood plan could be explored in tandem with such an approach).

Recommendation 4 Community led housing

Community led housing (CLH) operates as a social enterprise in various legal formats (see below) in which a community development organisation often working with a statutory landowner, builds, allocates, sells or rents units to local people. There are standard operating procedures (on allocation, rent, maintenance terminations and so on) but the concept is that it is the social enterprise that retains the profit from rent or sale to reinvest in other schemes, spot purchase or repairs. There is a good description of the approaches, finances, legal forms

and risks at [Community Led-Homes](#). The sponsor group needs land and finance although *revenue generated funding* is available from GB based suppliers in which loans are not repaid until rental income is generated. Land from the Housing Executive or DfC *could* be transferred at nil or nominal value to the sponsor group (Northern Ireland still does not have asset transfer or general disposal consent legislation) requiring mortgage finance on such projects (although [Community Shares](#) are an option to raise the down payment). Housing Development Grant is cumbersome but is precisely designed to deal with the shortfall in viability that face schemes in such circumstances and any delivery body would work through the process with the Department.

The table below sets out some of the instruments and organisational formats and a feasibility study into a small-scale intervention (initially say 10-20 units) in partnership with DfC and the Housing Executive might help explore the concept. There is a degree of failure in public and private markets in which community led responses can de-risk sites, build investor confidence, secure assets for local ownership and ensure the supply of accommodation to the community in the Shankill area.

<p>1. Co-housing involves separate household units alongside elements of communal activity. These self-contained dwellings benefit from the development of such communal facilities which are managed by an external group or by the residents themselves. The shared facility may be a large kitchen where inhabitants dine together as a group, or a hall where meetings and classes may be organised. It can also be a communal garden facility that is enjoyed and sometimes maintained by the residents themselves. This type of model is increasingly popular in Europe, particularly for older people or retiring populations that are looking to downsize. Weblink: UK Cohousing.</p>
<p>2. Community Land Trusts are community organisations that develop housing, community facilities or other assets that meet the needs of the community and act effectively as stewards of the land. In this model they may delegate the development work and/or management of the CLH development to a project partner or in some cases the land trust may act as the registered provider themselves. Weblink: National CLT Network.</p>
<p>3. Community Custom and Self-build housing involves members of local communities self-organising and coming together to build their own homes Here there is a clear sense of community benefit that is protected in perpetuity, from the development. This is where an individual or a collective of individuals, or persons working with or for individuals or associations of individuals, build or complete houses to be occupied as homes by those individuals. Weblink: National Custom and Self Build Association.</p>
<p>4. Housing Co-operatives are a form of Community Led Housing where it is built (or renovated) and managed by members of a group, with democratic collective control, to influence the scheme as well as its day-to-day management. The tenure is usually shared ownership or affordable rent. Weblink: Confederation of Co-operative Housing.</p>
<p>5. Self-Help Housing Self-help housing models work to bring empty properties back into use for the community whilst long terms decisions about their future are being made. Weblink: Self-Help-Housing.</p>

It should be emphasised that this is not a pilot but a community led and owned response capable of generating significant income, employment and training opportunities for local people. CLH schemes work at scale in Northern Ireland, especially in conditions of market failure, and involve 100s of units generating significant revenue, reserves and assets for social enterprises and is proposed as a start in a wider programme of housing-led regeneration for the area. The table below sets out a very outline, gross cost (without subsidy) of a CLH on

No. 62 (Housing Executive depot at Browns Square). The delivery body would negotiate the land at nil or nominal value and get start-up support from the Housing Executive’s *Social Enterprise Programme* (up to £50,000); and the Housing Executive’s *Community Involvement Grants* (for the following year for operational posts). Housing Development Grant would also significantly reduce the cost and any repayment period, whilst capital grant aid, revenue-based repayment loans and even Community Shares could help capitalise the deposit. A [Community Interest Company \(CIC\)](#) would also enable private sector investment, share risk and create a larger scale initiative (although also reduce income for the community).

Table 14 Outline implementation framework CLH scheme

Variable	Sub-totals	Total
Land value estimate	£250,000	£250,000
Housing Units (n=13)	£120,000	£1,560,000
Subtotal*		£1,810,000
Management	Post & management costs	£60,000
Subtotal		£1,870,000
Average rent	£550 per month	£85,800 pa
Deposit		£200,000
Mortgage 30-years*	Per annum	£6,970
Capital loan		£1,670,000
Gross repayment period		21 years

Recommendation 5 Regeneration implementation programme

There is frustration with plans, visions and strategies that have delivered little for the Shankill and a need to move to *delivery*, within the context of already agreed frameworks (See Working Paper No. 1). However, it is important not to separate the housing market from the labour market and to see residential development linked to where and how people work, earn a good standard of living, access services and enjoy a high-quality environment. BUILD has assembled a comprehensive asset base in the area, which offers an important platform for actionable regeneration, by looking at the capacity of each site to contribute to housing, economic and social outcomes for the Shankill. There is a need to better connect the community with educational and labour markets in the wider urban economy; and to internally restructure the local economy in a way that meets local needs, provides demand deficient services and gives the community autonomy in its own economic development. Creating the right *delivery vehicle* to support a social enterprise will be important for a CLH scheme but also has implications for the wider regeneration of the area.

Section 5 References and sources

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