Belfast is a city of exceptional possibilities. Our city has seen an impressive trajectory of development across sectors ranging from hotels, office accommodation, cultural venues and visitor experiences, education space and student and residential accommodation.

We’re committed to taking Belfast to the next level. The £850 million Belfast Region City Deal will see investment in innovation and digital, tourism and regeneration, infrastructure and employability and skills across 22 projects. These projects will be underpinned by investment in employability and skills which will accelerate inclusive economic growth, significantly increase GVA and create up to 20,000 new and better jobs across the region.

Strong collaborative leadership is key - and we’re leading by example in the Belfast Region.

Belfast City has an extensive track-record in real estate development. During the last five years, Belfast has seen over 2.5 million sq ft of floor space of office accommodation completed or under construction, almost 5,000 purpose built student accommodation beds have been completed or under construction, and to support the growing tourism market, 1,500 hotel beds have been completed; and approximately 5,000 residential units for the city centre are at various stages in the planning process.

Additionally, there are over 40 acres of major mixed-use regeneration schemes currently in progress, including Weavers Cross (a major transport-led regeneration project) and significant waterfront developments.

As a city with unrivalled growth potential, we look towards an exciting future for all in which to live, work, learn, play and invest.

I’m delighted to showcase Belfast’s investment opportunities with you.
Belfast at a Glance

Capital of Northern Ireland

- Belfast region population: 1 million
- Population under 30 years old: 43%
- Access to ultrafast broadband in households: 92%
- Telecoms link between Northern Ireland, Europe, and North America: 100 GB (per second)

2nd fastest growing knowledge economy in the UK¹

Ranked 2nd European mid-sized city for FDI strategy²

Ranked 3rd European mid-sized city of the future for economic potential³

¹ Source: Connect Knowledge Economy Report / 2018
² FDI Intelligence 2020/21
³ FDI Intelligence 2020/21
Reasons to Invest in Belfast

Location
You can reach London in 60 minutes by air whilst Dublin is 90 minutes away by car with regular bus and train services between the two cities.

High Growth Clusters
Belfast is home to thriving clusters of high growth companies, with significant strengths in creative and digital, financial and professional services, cyber technology and advanced engineering and manufacturing.

Cost Effectiveness
Belfast is a top 10 city for cost effectiveness with office rents half those of Dublin and one third of London rental charges. Prime yields in Northern Ireland for high street shops stand at 6% and offices 5.75%. Compare that to a UK average of 4.25% and 4%, and Republic of Ireland averages of 3.15% and 4%. Salary costs are one third lower than other major western European capitals.

Quality of Life
Belfast has been ranked in the top six cities in the UK for having the best quality of life. It’s among the cities with the lowest cost of living in the world. Northern Ireland’s rating for life satisfaction is above the UK average. In 2020, Lloyd’s named Northern Ireland as the happiest place to live in the UK.

Technology & Innovation
Belfast is the second fastest growing knowledge economy in the UK and home to globally recognised research centres in secure information technologies, cognitive robotics, renewable technologies and cancer research.

Talent
Northern Ireland was the top performing region in the UK for GCSEs in 2018. 28,000 full-time students study at Belfast’s two main universities.

Track Record
900 international companies are located in Northern Ireland, employing over 100,000 people. 71% of new investors reinvest.

Key Sectors

Creative & Digital
Creativity is part of Belfast’s DNA. Whether it’s film, TV, sound production or states of the art virtual and augmented reality, Belfast’s creative companies are making their mark globally. A young population and highly skilled workforce ensures there is a wealth of talent available across the film, animation, music, mobile gaming, and TV subsectors. This represents a diverse and easily accessible supply chain for the creative and digital industries. Belfast’s reputation as a location for film and television production has grown significantly in recent years. The city has been able to call itself home to major TV and film productions such as HBO’s Game of Thrones, The Fall, Krypton and Line of Duty. Belfast is one of the fastest growing creative clusters in the UK and home to over 1,600 companies employing 20,000 people.

Financial & Professional Services
Digital capability and access to outstanding talent means that Belfast is now home to a diverse range of financial and professional services companies. Over 20,000 people are employed in this sector by globally recognised brands such as Allstate, Arla, Derry & Derry, Baker Tilly and Henderson. They sit alongside a rapidly growing cluster of FinTech companies. Belfast is one of eight UK financial centres and its specialisms include asset management, fund administration, operations, risk, regulation and compliance. A pipeline of over 5,000 graduates across relevant disciplines such as finance, accounting, economics, law and computing provide a ready supply of skills and talent to support this growing sector.
Belfast is recognised as a global centre of excellence. A powerful combination of the city’s talent, innovation, resilience and pioneering research developed over the last three decades is priming Belfast for success.

Belfast is now the world’s number one destination for US based cyber tech investment. With over 1,700 people currently employed in tech related jobs, the city is fast becoming a global hub for cyber security.

International companies like Capita, IBM, AlertLogic, Proofpoint, Whitehat, Rapid7 and Synopsys have set up in Belfast, whilst the city is also home to the Centre for Secure Information Technologies (CSIT), the largest cyber security centre in Europe and recognised by Government Communication Headquarters (GCHQ) as an academic centre of excellence. The largest of its kind in the UK, this flagship centre counts BAE Systems, IBM, Infosys and Thales, amongst its partners. Companies specialising in financial software data analytics and encryption, access control systems, intelligent surveillance technologies and cyber security all have bases in the city.

Belfast is steeped in a rich engineering heritage that’s brimming with knowledge, skills and experience. The region is Europe’s eighth largest aerospace region, and Belfast is a global leader in advanced manufacturing and engineering, with the sector contributing £1 billion to the local economy annually.

With a long tradition of excellence in heavy industry and cutting-edge research, Belfast is proud to be called home by Spirit AeroSystems. As a result, the city occupies a pole position in aerospace engineering.

Research and development are at the core of Belfast’s growth in the manufacturing sector. These areas are strategically supported through The Northern Ireland Advanced Composites & Engineering Centre to support innovation through collaboration.

Belfast is Europe’s leading destination for new medical software and is a pioneering centre for new technologies in life and health sciences. Strong relationships between industry and the city’s prestigious universities have produced pioneering research and many new discoveries.

The Centre for Cancer Research and Cell Biology at Queen’s University Belfast has revolutionised cancer research, while the Connected Health Innovation Centre at Ulster University leads transformational projects to align care needs with technology providers, researchers and clinical experience.

Andor Technologies is renowned for building the world’s most advanced scientific cameras used in medical research and space exploration and Heartsine is a world leader in emergency cardiac technology.

Voted the world’s number one destination for 2018 by Lonely Planet, 2019 was a record year for business tourism sales with 112 new conference and events secured for the city for future years, up 47% on the prior year.

In 2019, Belfast welcomed over 275,000 cruise visitors on 146 cruise ships, an increase of 28 ships from 2018. Belfast Harbour opened a new cruise terminal which provides the first dedicated facilities for cruise ships on the island. The city is also home to Titanic Belfast, named the Best International Experience in 2018. Tourism contributed £2.7 million per day in 2018 to the region’s economy, and the city saw 1.7 million overnight stays. Belfast has added more than 3,000 additional hotel bed spaces across the city between 2015 and 2017, with 1.14 million room nights sold in 2018.

These, and other development opportunities in this sector, will contribute to Belfast’s ambition to double the value of tourism.
We are focusing our efforts on areas in which we can become genuinely world class, namely digital / ICT, life and health sciences, creative industries, advanced manufacturing and tourism. A summary of our proposals is available at: www.belfastcity.gov.uk/belfastregioncitydeal

These integrated set of projects are designed to transform the region’s economy. They seek to address a number of key barriers to growth by taking measures to improve productivity, invest in innovation, tackle economic activity and deprivation, address skills gaps and inequalities, invest in additional world class visitor experiences and develop our physical and digital infrastructure.

It’s our aim to secure £1 billion of co-investment to deliver a 15 year programme of inclusive growth, an increase of £470m Gross Value Added and create up to 20,000 new and better jobs, accessible to people from all communities through the Belfast Region. Together with Antrim and Newtownabbey Borough Council, Ards and North Down Borough Council, Lisburn and Castlereagh City Council, Mid and East Antrim Borough Council and Newry, Mourne and Down District Council and Queen’s University Belfast, Ulster University and Belfast Metropolitan College, Northern Regional College, South Eastern Regional College and the Southern Regional College, we are currently finalising outline business cases for the 22 projects proposed under the Belfast Region City Deal (BRCD).

THE FOUR PILLARS OF OUR AMBITIOUS PROPOSITION ARE:

- Tourism-led regeneration
- Innovation and digital
- Employability and skills
- Infrastructure
Despite our upcoming exit from the EU, there is still much to shout about in the Northern Ireland market, particularly in and around Belfast which remains in robust health. A major announcement in early 2019 came from Deloitte, which sees Belfast as an important part of its UK office network. By 2021, the firm is expected to be employing over 1,000 people in the city. Retail and hotel demand also remain healthy, thanks in part to the success of The Open Championship at Royal Portrush and HBO’s Game of Thrones.

During the last 24 months, the Belfast hotel sector has seen considerable new supply entering the market. After very limited new supply in recent years there was a significant increase in the number of new hotels and extensions to existing hotels. According to CBRE research, approximately 1,500 new bedrooms will be added to the number of new hotels and extensions to existing hotels. We believe no further significant new supply had an impact on the trading performance of the existing supply. As expected, this significant new supply had an impact on the number of active hotel rooms available. A number of real estate projects will also be completed, including City Quays 4, a 250-apartment build-to-rent development; Pierpoint Plaza, a five-storey office facility at Catalyst Inc; additional new film studios and a media hub at Giant’s Park and new public realm space.

As expected, this significant new supply had an impact on the trading performance of the existing supply. We believe no further new supply will enter the market until at least 2021/2022 as the rate of new openings slowed and the only new supply to open was the 19 unit “Dream Pods” by Dream Apartment on Bank Square in July.

The food and beverage sector remains buoyant with continued demand across national and local operators and in particular Tim Hortons’ Starbucks and Bob & Barons continues to secure new opportunities. Belfast city centre continues to be the focus for some, with Toni Macaroni announcing its new opening in Victoria Square and the long-anticipated search beginning for Knipex Kneama. Additionally, it has recently been announced that JD Wetherspoon is purchasing the freehold interest of the Revolution Cafe in Arthur Street, Belfast.

The retail warehouse sector continues to perform strongly with limited vacancy across Northern Ireland and demand for units in key locations. Longwood Retail Park at Newtownabbey is a fine example of how this market is performing with new lettings recently completed with Bobsbys (their first opening in Ireland). House Proud furniture and a letting agreed to Iceland Food Warehouse, which is currently subject to a planning application. In addition, Home Sense have recently opened in the existing TK Maxx store. Lidl continue to be active with new stores announced at Navy and Ballymoney and planning applications currently running at Hollywood Exchange, Newcastle, Newtownards and Derry/London. The convenience sector remains positive with all main brands continuing to open new stores in targeted locations.

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The investment spend for Q3 has totalled £44.6 million which brings the yearly total to £156.9 million. We are aware of an additional £25 million currently under offer and in ‘legals’. Retail yields have continued to soften, a reflection of the challenging retail occupier sector however a number of opportunistic investors are continuing to remain active and capitalise on softening pricing and higher yielding returns.

Institutional investors generally are seeking to place capital in sectors offering longer income returns. These alternative sectors include long let offices, ground rents, healthcare and multi-family residential. We are witnessing more activity in these sectors in Northern Ireland, particularly Belfast and anticipate transactions in the healthcare and multi-family residential sectors going into 2020.

Belfast is home to two universities: Queen’s University Belfast and Ulster University. The city has a student population of over 42,000. Queen’s University Belfast is the largest with a full-time student population of 19,000, followed by Ulster University with a full-time student population of 9,395.

The purpose-built student accommodation market in Belfast is an emerging one with fewer operational schemes than other UK university cities with a comparably sized student population. The relocation of the Jordanstown campus to Belfast city centre will bring 15,000 students to the city by 2022 and as such York Street has seen a vast amount development in the past few years. The two largest developments in the area include 89-107 York Street, a 717-bed scheme and 24-44 Little Patrick Street, a 430-bed scheme being developed by Vales Students and Lucena Developments respectively.
Titanic Quarter

Titanic Quarter is one of Europe’s largest urban waterfront regeneration projects, master planned over 185 acres on prime water frontage in the heart of Belfast city. Investment to date totals £450 million, delivering a mix of residential, commercial, tourism, education and retail projects.

20,000 people now live, work, visit and stay in Titanic Quarter daily, with the area attracting over 1 million visitors each year. Titanic Quarter is home to Titanic Belfast, which has welcomed over 1 million visitors each year. Titanic Quarter daily, with the area attracting over 1 million visitors each year. Titanic Quarter is home to Titanic Belfast, which has welcomed over 1 million visitors since opening in 2012, and Titanic Studios, where the world’s biggest TV show, HBO’s Game of Thrones was filmed. Construction of a 105,000 sq ft logistics facility has commenced, and the next phase of Grade A office development, Olympic House, which commenced construction in March 2020. Planning has recently been approved for the Hamilton Dock Hotel - a 276-bedroom family focused hotel which is scheduled for completion in 2021.

Full and outline planning permission is granted for the next 280,000 sq m of mixed use development which offers multiple investment opportunities.

City Quays

City Quays is a £275 million, eight hectare, office led waterfront regeneration project located on former docklands at the edge of Belfast city centre.

Completed projects include two Grade A office developments, City Quays 1 and City Quays 2 which are home to Blue chip occupiers such as Baker McKenzie, ITV and NBC. A third Grade A office, Quays 3 (250,000 sq ft) is under construction with completion due 2021.

Other completed developments include a new four storey, 190 bedroom, AC Hotel by Marriott, which opened in Spring 2018, and includes multi Michelin starred Chef Jean-Christophe Novelli’s first and only restaurant in Ireland, and a 900 space multi-storey car park which opened earlier this year.

The Sixth

The Sixth is a major redevelopment project that will bring the iconic former Belfast Telegraph building back into active use.

Delivered by BelEIIL LLP, the first joint venture by Belfast City Council with a private developer, McAleen and Rushe, this mixed-use scheme will include 33,000 sq ft of commercial space, including state-of-the-art workplaces, and active ground floor uses such as cafes, restaurants and retail.

Designed by Stirling Prize winning architectural practice Allford Hall Monaghan Morris (AHMM), the project is adjacent to the new Ulster University campus and sits at the heart of an emerging creative district centred on the education, culture, media and technology sectors in Belfast city centre.

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Belfast Waterside

The Waterside is a five year, £450 million development project located on the 16 acre prime waterfront land that was once the Howden Sirocco site.

This pivotal site reconnects Belfast city centre and embraces its most iconic natural asset, the River Lagan.

Owned by Osborne+Co, pioneers in placemaking and owners of a worldwide portfolio of £2.5 billion end value projects across four continents, The Waterside will provide places to live, play, work and stay, but it will also provide opportunity in the form of BEON, an ethos around creative talent generation - a key outcome of the bespoke Placemaking Plus Belfast strategy.

Works to Phase 1 have commenced on the listed Garfield & North building, creating city centre living. This phase also includes Sixty Three, a modern 3,000 sq ft office. Planning has also been achieved on a 130,000 sq ft international HQ office.

Outline Planning Permission has been achieved for the remainder of the site for a mixed-use scheme comprising of 484,000 sq ft of offices, residential units (up to 367 units), 64,500 sq ft of hotel space in a prominent listed building alongside restaurant, retail units and cultural/ community space.

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Tricbea Belfast

Tricbea Belfast is the largest regeneration project currently under construction in Belfast city centre. It will create a new urban hub which blends the area’s history with cutting edge, locally-inspired design.

Tricbea Belfast comprises 12 acres of the city centre and, when completed, will deliver 1.5 million sq ft of residential, office, retail, hospitality and cultural space across three phases.

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Giant’s Park

At 138 hectares, Giant’s Park is Belfast’s largest development site ever offered to the market. This landmark site is adjacent to the main motorway network, Belfast Harbour and 7km from George Best Belfast City Airport.

A portion of the development site has a unique planning use designation for waste management and recycling facilities providing developers, occupiers and investors the opportunity to be part of a cutting edge Cleantech business sector on a 12 hectares portion of this former landfill site. Fully serviced sites are currently available in various lot sizes from 2,000 to 120,000 sq m.

Located on a 81 hectare portion of this former landfill site, Giant’s Park Belfast Ltd was appointed as preferred developer to take forward a world-class commercial leisure led attraction as part of a mixed-use scheme, with opportunities for both investors and occupiers. Partially capped, approx 45 hectares of the site is suitable for outdoor leisure development, whilst the remainder provides the opportunity for commercial development with access roads and all normal services provided.

The forerunner development at Giant’s Park is Belfast Harbour Film Studios, a 147,000 sq ft film studio completed in 2017. Belfast Harbour has also recently obtained planning permission for expansion on both sides for an additional 345,000 sq ft.
Smithfield Yard

B typography / Ashmour own a 1.25 acre site between North, Weetvew and Gresham Streets in the Smithfield area of Belfast. The proposal will transform a car park next to Belfast’s Smithfield Market and close to Ulster University’s new campus into an ecosystem of diverse workspaces, independent retail and SME and maker spaces.

The campus development includes 3 new buildings offering a spectrum of office and workspace typologies alongside the refurbishment of the listed Butcher’s Building and the Victorian terraces on Gresham and Weetvew Streets.

A significant amount of the 255,000 sq ft floor space being created will be dedicated for office use, accommodating around 1,500 people. The remainder will be a combination of retail, Studio and alternative work space that will seek to promote independent enterprise over multinational chains.

Project Sponsor
Bywater Properties / Ashmour

Scale
£75 million

Sector Grade A office
SME workspace, independent retail

Location
Belfast city centre

Programme
Opportunities available from 2020

Planning Status
Full planning permission granted

Queens’s Quay

Queens’s Quay is a major waterfront Belfast city centre development opportunity consisting of 13,000 sq m of prime development land and offering the potential development of over 55,000 sq m of commercial space, including residential, Grade A workspace and ‘active’ retail and leisure opportunities.

Situated at one of the most strategic gateways from the city centre to east Belfast, the site is adjacent to landmark visitor attractions including The Odyssey SSE Arena and Titanic Belfast. As the landing point for the Lagan Weir Bridge, it’s also attractive for water based leisure activity.

Owned wholly by the public sector, the Department for Communities is developing the hard infrastructure to maximise development potential and provide a seamless approach to market.

Project Sponsor
Bywater Properties / Ashmour

Scale
£100 million with total floor space of over 50,000 sq m

Sector
Office, residential, hotel, amenity

Investment type
SME workspace, independent retail

Location
East of Belfast city centre

Programme
Opportunities available now

Planning status
Outline planning application submitted early 2021

weaverscross.co.uk

Weavers Cross

Weavers Cross is a transport led regeneration project which will link a new high capacity transport hub with mixed-use development opportunities close to Belfast city centre.

The Belfast Transport Hub is a £200m multi-million-pound flagship transport project of national significance prioritised by the NI Executive. Work has commenced and the new station is expected to open Autumn 2024. The station will cater for 34 million passenger journeys to and from Belfast city centre and includes a direct rail and bus link to Dublin.

The Transport Hub will be the catalyst for the surrounding Weavers Cross neighbourhood, a mixed-use development which can be phased and has the potential for 125,000 sq m of mixed-use floor space.

The project will support regeneration of nearby communities, create a new gateway to Belfast and stimulate economic opportunities for the city and Northern Ireland.

Project Sponsor
Translink Group

Scale
Circa £360 million with total floor area of 125,000 sq m

Sector
Offices, hotel, residential, amenity

Location
Belfast city centre

Investment type
Development partner or equity investor/funder

Programme
Opportunities available 2020

Planning status
Construction works commenced on Belfast Transport Hub, Early Market Engagement for Master Developer H1 2020

Residential-led Developments

The proposed project combines 3 no. prime sites located in the heart of Belfast city centre and ideally placed for residential led development.

The promoter, Belfast City Council, is keen to bring forward residential led mixed-use development opportunities in order to support its ambition of substantially growing the number of new homes within the city centre by 2035. By combining these 3 no. sites this project offers the opportunity to bring forward housing led development at scale including Build to Rent products across a range of tenures.

The indicative development proposals comprise:

Exchange Street/Corporation Street - up to 385 residential units on a site of c. 0.49 acres/0.20 ha with active Ground Floor commercial space.

Ormeau Avenue - up to 150 residential units on a site of c. 0.49 acres/0.20 ha with active Ground Floor commercial space.

Gloucester Street/May Street - up to 100 residential units on a site of 0.35 acres/0.14 ha with active Ground Floor commercial space.

Project Sponsor
Belfast City Council

Scale
£100m + across the 3 no. schemes at Exchange Street/Corporation Street, Ormeau Avenue and Gloucester Street/May Street Belfast

Location
Belfast city centre

Investment Type
Developer, investor

Programme
Opportunities available now

Planning status
Pre-Planning Stage
Located in the north of Belfast’s prime retail pitch, this area is anchored by a number of key developments including Ulster University’s new £250 million campus, the planned redevelopment of Belfast Central Library, and the development of the former Belfast Telegraph Building, The Sixth.

We’re transforming this area to create a vibrant place which embodies and nurtures creativity, innovation and culture.

The Linen Quarter extends across a grid of streets immediately to the south of Belfast City Hall, occupying a prime Belfast city centre position.

A significant amount of late Victorian architecture remains in this location, setting the Linen Quarter apart from other parts of the city centre – and many other cities. The nature of these buildings and the predominant business use is also unique, providing a distinctive, attractive district for commercial activity in Belfast and Northern Ireland.

The East Bank encapsulates approximately 20 hectares of land to the east of the River Lagan. It’s steeped in history; Belfast was an industrial powerhouse in the 19th and 20th centuries, dominating shipbuilding and rope-making across the globe.

There are three significant sites in single ownerships:
1. Odyssey Masterplan area comprises 6.9 ha (17 acres), with planning consent for up to 800 apartments, two hotels, cafés, bars, restaurants and retail.
2. Queen’s Quay comprises 1.3 ha (3.2 acres), a major riverfront mixed-use development site in public ownership.
3. Belfast Waterside comprises 6.5 ha (16 acres): a £400 million scheme comprises residential (650-700 units), office (857,000 sq ft), hotel and serviced apartments (18,500 sq ft), restaurants, cafés, local retail, community space and public open spaces.

The proposed first phase of the project comprises a £50 million office building (250,000 sq ft).

Identified as a ‘Special Action Area’ in the Belfast City centre Regeneration and Investment strategy, the East Bank provides a lively, diverse, accessible and well-connected opportunity for developers seeking to create places to live, work and socialise.

Located to the north of the city centre, this area sits between the new £250 million Ulster University campus, the emerging £180 million City Quays development, and the culturally vibrant, lively and historic Cathedral Quarter.

Covering close to 20 hectares, the masterplan provides land use proposals and a Transport and Movement Framework to promote a vibrant mixed-use site, encouraging a coherent approach to developing business, residential and community placemaking in an area of great historical significance.

Greater Clarendon & Sailortown

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Inner North West

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