Lisburn & Castlereagh City Council

Local Development Plan

Technical Supplement 4:

Office Capacity Study

October 2019

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1.0 INTRODUCTION

Purpose and Background

1.1 This Technical Supplement provides details of the evidence base used to inform the preparation of the Lisburn & Castlereagh City Council draft Plan Strategy for the period 2017 -2032. It is one of a suite of topic based Technical Supplements that should be read alongside the Local Development Plan (LDP) and which sets out the rationale and justification for the strategic policies, allocations and proposals within the draft Plan Strategy.

1.2 It builds upon the suite of 14 thematic Position Papers prepared and published alongside the Preferred Options Paper (POP), which established the baseline position and identified the key issues that need to be addressed by the LDP.

1.3 The evidence base has been informed through an independent evidence-based Office study undertaken by professional consultants. The details of these reports were presented to Members during preparation of the policy for the draft Plan Strategy.

1.4 The aim of the research was to inform the emerging Local Development Plan (LDP) by identifying the potential future supply for office growth within the Council area and provide a sound policy base for future planning decisions. The key requirements of the study were to:-

- provide a detailed qualitative and quantitative review of existing office stock in the Plan area;
- to assess the current supply and demand for office space in the Plan area; and in the light of the above data and forecasts to;
- carry out a review and advise on the appropriateness of existing office location policy, taking into account the demand for office space and sustainability issues; and
- if considered necessary, recommend what changes should be made to office policy within the existing Development Plan.

2.0 POLICY CONTEXT

Regional Policy

2.1 The regional policy context is provided by the Regional Development Strategy 2035 (RDS), the Strategic Planning Policy Statement (SPPS) and regional Planning Policy Statements. The latter are subject to the transitional arrangements set out in paragraphs 1.10-1.16 of the SPPS, which states that existing policy retained under the transitional arrangements will cease to have effect where a Council adopts its Plan Strategy. A summary of these documents and how they relate to plan making and office development is provided in the following sections.

Regional Development Strategy (RDS) 2035

2.2 The RDS 2035 prepared under the Strategic Planning (Northern Ireland) Order 1999 by the Department for Regional Development (published 15th March 2012) is the spatial strategy for the Executive and provides an overarching strategic planning framework to facilitate and guide the public and private sectors and is material to decisions on individual planning applications.

2.3 The RDS provides strategic guidance through Regional Guidance (RG) and Spatial Framework Guidance (SFG) under the 3 sustainable development themes of the Economy, Society and Environment. The Spatial Framework Guidance of the RDS 2035 at para 3.36 states the following:

"The urban area of Lisburn benefits from its location at the meeting point of the Belfast/Dublin economic corridor and the east/west transport corridor. … Lisburn has a vibrant city centre with a strong focus on leisure provision, sports and the arts. Potential exists to grow the retail offer and create high quality office offer through the creation of employment in business services. Potential also exists to generate a new driver for the night time economy and to provide a range of flexible commercial accommodation and business parks at development locations such as Blaris and the Maze/Long Kesh."

2.4 This view is repeated and reinforced under SFG1 of the RDS as follows:

- Identify and protect key locations for economic growth. This will strengthen the role of the BMUA as the regional economic driver. Major employment/industrial locations in Belfast Harbour Area, (including Titanic Quarter), West Lisburn / Blaris, Purdysburn and Global Point / Ballyhenry being connected to public transport will support the drive to provide a range of opportunities for job creation.
- Enhance Lisburn City as a major employment and commercial centre. Lisburn is strategically located at the meeting of key transport corridors and has high development potential and the scope to generate additional jobs…. Potential exists to grow the leisure offer and create high quality office offer through the creation of employment in business services".

Strategic Planning Policy Statement for Northern Ireland (SPPS)

2.5 The SPPS recognises the importance of economic development to meet the local employment and economic development needs of the area in a strategic manner. Two of the objectives are;

- Promoting economic development in a sustainable manner
- Ensuring the provision of a generous supply of land suitable for economic development

2.6 In larger settlements appropriate proposals for Class B1 business use (offices and call centres) should be permitted if located within city and town centres and in other locations that may be specified for such use.

Local Policy

2.7 The current planning policy context at a local level is complex as a result of a successful legal challenge to the adoption of the Belfast Metropolitan Area Plan (BMAP) 2015. There are therefore five existing development plans that relate to parts of the Lisburn & Castlereagh Council district, alongside draft BMAP. All of these documents will be superseded at the adoption of the new Local Development Plan 2032. The SPPS's transitional arrangements provide for continuity until such times as a new LDP for the whole of the council area is adopted to ensure continuity in planning policy for taking planning decisions.

Belfast Metropolitan Area Plan 2015

2.8 Although formally adopted in 2014, this process of final BMAP adoption was declared unlawful as a result of a judgement in the court of appeal delivered on 18 May 2017. This means the Belfast Urban Area Plan (BUAP) 2001, Lisburn Area Plan 2001 and the other Development Plans provides the statutory plan context for the area.

2.9 BMAP, in its most recent, post-examination form remains a significant material consideration in future planning decisions. It was at the most advanced stage possible prior to formal adoption. BMAP referred to throughout this document therefore refers to that version. However, in preparing this document the council has also had regard to the provisions of the draft BMAP which was published in 2004, the objections which were raised as part of the plan process and the Planning Appeals Commission Inquiry report.

Belfast Urban Area Plan (BUAP) 2001

2.10 The current development plan for the majority of the Belfast district is the Belfast Urban Area Plan (BUAP) 2001, which was adopted in December 1989. The area covered by the plan included the whole of the administrative area of the former Belfast City Council area, together with the urban parts of the former district council areas of Castlereagh, Lisburn and Newtownabbey as well as Greenisland and Holywood.

2.11 The purpose of the BUAP was to establish physical development policies for this broad urban area up to 2001, clarifying the extent and location of development and providing a framework for public and private agencies in their investment decisions relating to land use. Although alterations were made in 1996, the BUAP is now largely out-of-date and was formally superseded by the BMAP in September 2014. However, BMAP was quashed as a result of a judgement in the court of appeal delivered on 18 May 2017, meaning that the BUAP 2001 remains a statutory development plan.

The Lisburn Area Plan 2001

2.12 The change in council boundary as a result of the local government reform on 1 April 2015, and the subsequent quashing of BMAP, means that the Lisburn Area Plan 2001 remains a statutory development plan. Adopted on 4 July 2001, the Lisburn Area Plan sought to establish physical development policies for Lisburn and its surroundings up to 2001.

Lagan Valley Regional Park Local Plan 2005

2.13 The quashing of BMAP also means that the Lagan Valley Regional Park Local Plan (adopted in 1993) was re-instated as the statutory development plan for the Lagan Valley Regional Park (LVRP). It sets out the strategy and policies associated with the protection and enhancement of the natural and man-made heritage of the LVRP. Its main objectives are to conserve the landscape quality and features of the Lagan Valley and to enhance recreational use for the public.

Carryduff Local Plan 1988-1993

2.14 The adopted Plan comprises the provisions of the Draft Plan as approved and amended by the Adoption Statement. A composite Proposals Map and schedule for Carryduff was subsequently produced.

Lisburn & Castlereagh Community Plan

2.15 The Council took on responsibility for community planning in 2015 as a result of local government reform. Community Planning is enshrined in the Local Government Act (Northern Ireland) 2014 and places a duty on the Council along with a number of named partners to identify long-term objectives for improving the social, economic and environmental well-being of the district and the achievement of sustainable development while promoting equality of opportunity and good relations and tackling poverty, social exclusion and patterns of deprivation. The plan sets out a joint vision and long-term ambitions for the future, as well as outlining priorities for action.

2.16 The Community Plan vision for Lisburn & Castlereagh is 'An empowered, prosperous, healthy, safe and inclusive community'.

2.17 Delivery of this vision is based on a number of strategic outcomes. Councils must take account of their current Community Plan when preparing a Local Development Plan (LDP). The Community Plan include the supporting outcomes including that neighbourhoods are designed and regenerated to promote well-being, everyone lives in an affordable home that meets their needs, we have access to essential services, shops, leisure and workplaces and there is a modal shift to sustainable and healthy transport options.

2.18 The LDP will provide a spatial expression to the community plan, thereby linking public and private sector investment through the land use planning system.

3.0 KEY FINDINGS – POSITION PAPER 4 RETAILING, TOWN CENTRES AND OTHER USES

3.1 A summary of the key findings of Position Paper 4 Retailing, Town Centres and Other Uses is provided below:

- Further opportunity exists to develop Lisburn as a major employment, retailing and commercial centre;
- Historically, the City Centre has suffered from a lack of modern office accommodation to attract businesses. Most cultural/leisure facilities are located outside the ring road and the lack of a centrally located hotel is also a major barrier to development of the City Centre’s evening economy.

4.0 EXECUTIVE SUMMARY OF OFFICE CAPACITY STUDY

4.1 The Office Study was undertaken by haa design to inform the Council of future office need and demand across the Council area, and provide a robust evidence base for the LDP. The office study was carried out in conjunction with GVA NI.

Approach and Methodology

4.2 The methodology analysed existing **supply**, with respect to its ability to provide flexible, modern office accommodation that supports new ways of working and compare this with demand – i.e the current and potential requirement for new office space. This involved looking at sector trends and the wider economy. It also analysed **demand,** using publicly available population and economic information. In order to predict future office demand, current trends, along with local stakeholder engagement were also considered.

Background Information

4.3 The Consultants considered the projected **population** increase in the Council area during the Plan period (an increase of 18 413 or a growth rate of 13.1%). During this period, the percentage of LCCC's working age population is predicted to remain at 62% while the percentage of children will drop from 20% to 18.2% whilst those of a pensionable age will increase from 18% to 19.9%. It is assumed the business sector will continue to grow in line with these projections. haa indicated there was some difficulty in gathering up to date information on Council specific economic trends but noted that the latest available statistics from NISRA indicate the LCCC is above the Northern Ireland average when it comes to both the economic activity rate and the employment rate.

Analysis of Existing Supply

4.4 The Consultants analysed rating information provided by LPS to the Council, extracting information on the office area in question as well as floor levels and the rateable value per m^2. Quality of the accommodation was also assessed using a scoring mechanism devised by GVA NI which looked at location, quality, parking, flexibility and working environment of each property.

Analysis of Accommodation

4.5 The total office accommodation, according to the entries in the filtered database, and using the methodology outlined above, resulted in an assessment of supply of **36,960.07m^2** (gross area) of space (**partly let**). The overwhelming majority of which is was determined to be of 'average' quality (as determined by a scoring of quality using five criteria (see page 10 of the main document for further details). The report highlights that significant locations with corresponding large office areas were excluded from the survey as it only took account of those areas within the draft BMAP 2015 boundaries (taking account of the revised Local Government boundaries).

4.6 The available office accommodation is heavily concentrated in certain wards with four of the wards making up c.85% of the total area. Additionally, in one ward (Hillhall) the office area is comprised of only one building (the council's Lagan Valley Island Centre at approximately 8500m^2). The only significant office provision outside of the greater Lisburn City area is located within the Beechill ward (i.e. Knockbracken Healthcare Park) with a total of approximately 5000m^2. Both Carryduff West and Hillsborough have c.1,600m^2 available, with the latter having approximately double the number of entries. At the other end of the spectrum, Dundonald ward has only one entry – a single office of area 11m^2.

Analysis of Existing and Potential Demand

4.7 Demand requires to be seen in terms of **potential demand** not **existing demand**. In terms of **potential demand**, the report identified that future office developments will require to meet certain fundamental standards: high-quality working environments, fast and reliable data connectivity and an uplift in terms of general quality and wellbeing compared with what is currently available. Using precedents set out in the methodology (page 24 of the main document) **a potential demand within the next 10 years for approximately 16 000m²** of offices of the medium-scale, business park type of development was proposed, i.e. a figure which excludes at one extreme small, town centre 'infill' types of development and the one-off large-scale developments that might be the result of, for example a central government initiative or Foreign Direct Investment (FDI)[1]. While this figure falls well short of the above available **supply** it is essential to note that this is effectively in addition to the current supply, since it is considered that a small percentage of the current 36,960.07m^2 is considered fully adaptable for modern day needs.

Supply vs Demand

4.8 Based on an analysis of the type of supply currently existing (not of a high standard and not particularly well located) and the quantity of demand that has been estimated, haa design concluded that:

- There is a need to identify key development opportunities for 'edge of town' business parks (this could be done as part of the Local Policies Plan)
- There is a demand for at least 16 000m² of modern office space in the first instance
- The creation of more flexible planning policy relating to these sites should be considered as part of the draft Plan Strategy.

Comment on Existing Policy / Identification of Specific Opportunities

4.9 The report considers the existing policy framework and provides comments on specific opportunities:-

- **Lisburn City Centre** – Office development can play a vital role in the regeneration of the City Centre but may be restricted due to the conservation status of parts of the centre.
- **West Lisburn / Blaris** – any development is predicated on the creation of the Knockmore Link Road. Current policy permits up to 5000m² of office space but smaller scale developments of different sizes co-located within a business park type environment would be better suited at this location.

[1] Invest NI form part of the Department for the Economy (Northern Ireland) with a responsibility as the regional business development agency.

- **Purdysburn & Forestside** – The Purdysburn area has significant existing office provision. The office space within Forestside District Centre is neither practical nor flexible and larger office space in the locale are of poor quality and therefore unsuitable for new ways of working and modern organisations. However the report advises that the current provision for the size of office space at Forestside is appropriate, with potential to replace existing offices. The Purdysburn Major Employment Location (MEL) could accommodate up to 3000m² of office space and is well served by public transport.
- **Carryduff** – Currently has significant office provision (though of limited quality). Any significant development at the Purdysburn MEL has the potential to have a positive impact on Carryduff.
- **Dundonald** – Existing office provision (within boundaries of draft BMAP 2015) is non-existent. The proximity of the Ulster Hospital and the introduction of the Gliderbus system provides opportunities for commuter to travel out of Belfast but the 400m² restriction on office space may not be considered necessary.
- **Maze Long Kesh**[2] – This site offers further choice and could compliment any potential development at West Lisburn / Blaris. However, due to its national significance it will possibly require intervention and incentives at a governmental level.
- **Moira and Hillsborough** - Analysis of existing provision in both towns highlighted their importance as a strategic location on key transport corridors. The typical scale and quality of office accommodation appears to cater to the existing and potential demand with conservation area status being of significant importance in both settings.

Recommendations

4.10 In terms of **existing supply**, there is a total of 36 960m² of office accommodation within the draft BMAP 2015 boundaries. The number of high quality office spaces is very small (5%) with the majority being of a size and quality to support micro / small enterprises. There is also a very small number of high quality large offices, with the majority of offices being contained within four electoral wards.

4.11 In terms of **demand**, haa Design highlight the trends in modern working and the rise of co-working, with flexible leases, high levels of service and guaranteed data connectivity are standard. Within the Council area, the potential demand for new build, clustered high-quality office space is approximately **16 000m² within the next 10 years**.

4.12 With reference to the **existing policy framework**, the consultants recognised the desire to do things which are considered appropriate / bespoke for the Council area and to capitalise on the benefit that Lisburn has in terms of quality of life, cost of housing etc. to make it a business destination that is not competing directly with Belfast as the capital city but is working in tandem with Northern Ireland's primary office hub. This undoubtedly provides mutual benefits for all.

4.13 The **recommendations** from the Office Capacity Study therefore are:-

[2] Maze Long Kesh is governed by the Maze Long Kesh Development Corporation which is under the responsibility of the Northern Ireland Executive

- development opportunities such as flexible offices within Lisburn City Centre itself are prioritised (as a means of assisting with the regeneration of the city centre)
- the opportunity provided by the 'edge of town' site within West Lisburn / Blaris is specifically promoted and planning restrictions so defined as to allow for the creation of a high-tech business park with the capacity for at least 10,000m^2 of office space. This is currently identified as 5,000m^2 in the existing Development Plan (BMAP).. It is considered that the amended figure is more reflective of the position taken in the RDS 2035 and the ambitions of the Council to provide economic growth in this key location.
- high-quality small-scale development opportunities with flexible leases are investigated, with locations such as Purdysburn offering the right type of setting for either large, single occupancy offices or smaller R&D-type accommodation that supports the activities within the healthcare park itself. This is currently identified as 3,000m^2 in the existing Development Plan (BMAP). It is considered that this figure of 3,000m^2 is a reasonable quantum of high quality office space in this high-quality parkland setting
- the potential for future development on existing sites at Forestside is further investigated in developing the Local Policies Plan; several large public sector offices adjacent to the centre do not meet the criteria of modern, high-quality office accommodation
- there should be no change to existing policy in the smaller towns and villages; the market here will in essence cater for its own needs and circumstances
- in the longer term, and potentially requiring a concerted approach between central and local government, the opportunity to provide office space within the LCCC area for one of the smaller government agencies (plus touch-down spaces for <u>any</u> government staff) should be investigated in order to reduce overheads, provide a stimulus for local growth and de-centralise influence (subject to mutual agreement)
- office development on 'employment' zonings is presently limited. Allowing the council greater flexibility, by developing a policy approach on employment zonings for office development[3], is considered a more flexible and prudent option that would not detract from city/town centres. The Council should therefore consider a policy lead approach to allow for this flexibility.

[3] Class B1(a) of the Planning (Use Classes) Order (NI) 2015

5.0 OFFICE CAPACITY STUDY

Lisburn & Castlereagh City Council – Office Capacity Study draft final report v3.3

29th November 2018

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1. EXECUTIVE SUMMARY

This report summarises the work of **haa design** and GVA NI to undertake an office capacity study for Lisburn & Castlereagh City Council during the period April-August 2018. The aim of the study is to inform the council in the creation of a new Local Development Plan. This office study is being run in conjunction with other studies into areas such as housing, retail etc.

- **haa design**'s methodology has been to analyse existing **supply,** with respect to its ability to provide flexible, modern office accommodation that supports new ways of working and compare this with **demand** – i.e the current and potential requirement for new office space. The latter has been the more challenging aspect of the work, looking at sector trends and the wider economy.
- using information from the LPS website and a database filtered by LCCC, our survey of offices within defined boundaries has resulted in an assessment of supply of **36,960.07m^2** (gross area) of space (**partly let**), the overwhelming majority of which is of 'average' quality (as determined by a scoring of quality using five criteria set out on p. 10).
- in terms of **potential demand**, it is clear that future office developments will require to meet certain fundamental standards: high-quality working environments, fast and reliable data connectivity and an uplift in terms of general quality and wellbeing compared with what is currently available. Using precedents set out in the methodology on p. 24 (precedents that **haa design** have experience of) a potential demand over the Plan period for **c.16,000m^2** of offices of the medium-scale, business park type of development has been proposed, i.e. a figure which excludes at one extreme small, town centre 'infill' types of development and the one-off large-scale developments that might be the result of, for example a central government initiative or Foreign Direct Investment (FDI)[1]. While this figure falls well short of the above available **supply** it is essential to note that this is effectively <u>in addition</u> to the current supply, since it is considered that a small percentage of the current 36,960.07m^2 is considered fully adaptable for modern day needs.
- by considering the different geographical locations with reference to existing provision, it is clear that certain sites have more appeal than others, e.g. Lisburn City Centre would be more suitable for a co- working[2] space, while West Lisburn / Blaris is better suited to the type of business park that accommodates high-tech and growing businesses. The Maze Long Kesh[3] location, due to its national significance, will possibly require intervention and incentives at a governmental level.
- the benefits of Lisburn and the surrounding towns as places to live and places to work are well- documented through the Council's Corporate plan and 'Invest Lisburn Castlereagh' programme on the Council's website[4]. The ambition of LCCC to provide an alternative and attractive business setting to Belfast is one that has been expressed by the council and the preferred options paper makes it clear that there is opportunity for further growth in this sector.

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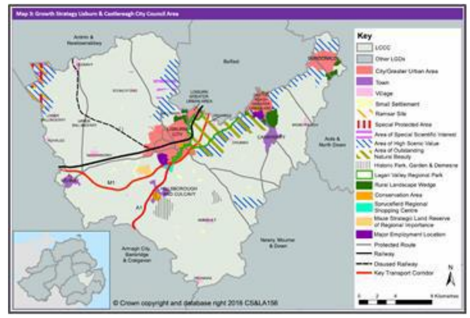
[1] Invest NI form part of the Department for the Economy (Northern Ireland) with a responsibility as the regional business development agency.

[2] A glossary of 'workplace' definitions is provided in Appendix 2.

[3] Maze Long Kesh is governed by the Maze Long Kesh Development Corporation which is under the responsibility of the Northern Ireland Executive

[4] https://www.investlisburncastlereagh.com/

2. INTRODUCTION



haa design and **GVA NI** were appointed in March 2018 to undertake an office capacity study within the Lisburn & Castlereagh City Council (LCCC) area. The aim of the study was to inform the council's decision-making with respect to the creation of their Local Development Plan LDP) and provide a sound policy base for future policy decisions. Through a combination of desktop research and on-the-ground surveys the current office provision was mapped, while a determination of potential future demand was determined by means of discussions with local stakeholders and an analysis of market trends. With reference to new ways of working and key employment sectors within LCCC and Northern Ireland in general, a gap analysis of supply vs demand highlighted areas of interest for LCCC and their LDP.

2.1 OBJECTIVES

The central aim of **haa design**'s study was to undertake an office capacity study and to report its findings. It is understood that this report will inform the council in the preparation of its Local Development Plan.

A key concern for LCCC is that any conclusions are evidence-based and in this respect **haa design** have:

- created a catalogue containing office accommodation within boundaries supplied by LCCC (Appendix 1)
- used the expertise of our colleagues in GVA NI to 'score' the accommodation
- gained an understanding of the current economic climate within LCCC and NI in general
- studied relevant office development precedents to put the assessment of demand into context
- discussed existing policy with LCCC with reference to how this co-ordinates with council-preferred opportunities in the future.

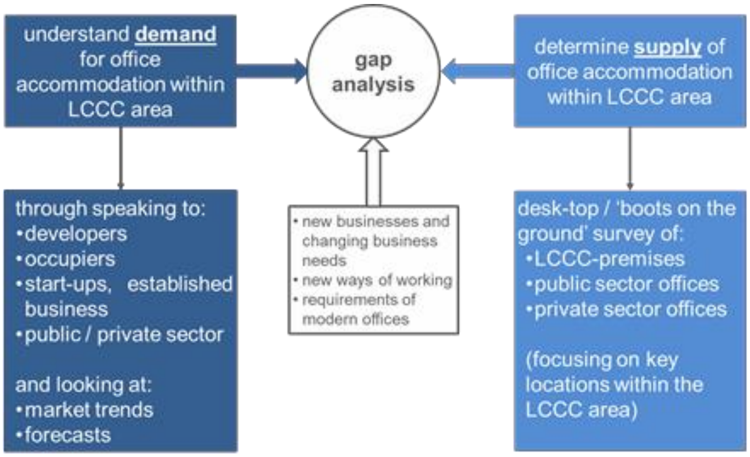
2.2 THE REPORT

This document is split into several parts, each covering a particular aspect of the study. Following a discussion of our approach and a summary of the different engagement activities, we present our analysis of the **supply *v* demand** equation for office accommodation within the LCCC area. The **supply** side of the analysis is ultimately focused on a database of existing provision that has been generated. Information is provided both quantitatively and qualitatively, with a discussion of the criteria used for judging the different accommodation. A geographic, quality-based analysis is also presented. The **demand** analysis uses data and information within the public domain, insights gained from discussions with local (LCCC) partners and stakeholders, an understanding of the changing landscape of work, and borrows from relevant precedents that the consultant team are familiar with. There follows a reconciling of supply and demand by way of a **gap analysis**, with reference to local and UK-wide trends as well as comment on any modification required to the current BMAP. The report concludes with a series of recommendations based on the work presented.

An extensive catalogue of the offices within the LCCC area is contained within Appendix 1. Further appendices provide background information on common workplace terminology, present a high-level comparison of statistics for LCCC and neighbouring councils, report on recent developments regarding the Belfast Region City Deal and finally discuss the potential for the re-location of central government functions.

3. APPROACH AND METHODOLOGY

Our fundamental approach to the office capacity study is based on the simple notion of analysing **demand** along with **supply**, and not merely to consider the static case of current supply but to determine the **potential** use of existing office provision for new ways of working and to analyse where future demand may be best suited.



The **supply** study has been more straightforward, though, due to the scale and nature of the investigation has been resource intensive. Taking our lead from an earlier capacity study by Colliers in 2003 that covered the entire Belfast Metropolitan Area, the starting point for this work was a database of office accommodation held by the Land & Property Services (LPS) directorate (within the Department of Finance). The primary reason for using the LPS database was that it is the only reliable and consistent data presently available.

For each office within their database, among the information held is the area (in m^2), the rateable value (in £/m^2) and the floor level (e.g. 1F = 1st floor). The results were filtered by LCCC to concentrate only on areas of interest within their area, the 268 unique database entries were analysed (see Appendix 1, p.6) and the total office area calculated. The 'catalogue' of entries is split into the different electoral wards since this was one of the fields that could be appropriately filtered using the data supplied.

A qualitative measure of the individual entries was provided by GVA NI who not only devised the criteria and the scoring system, but also performed the desk-top scoring and did a sample 'on-the-ground' study of several locations; the methodology and scoring is based on GVA personnel's extensive experience and thorough understanding of the local office market. A high-level analysis of the current supply based on geography and office floor plate size is discussed in section 6.

The **demand** study has necessitated a significant amount of desktop research. Publicly-available population and economic information (as well as comment and analysis) has been collated from sources such as the Northern Ireland Statistics and Research Agency (NISRA). In predicting future office demand, current trends, as well as information arising from creative discussions and collaboration with local stakeholders, has been used to generate an appropriate 'narrative'.

As well as meeting with our colleagues at LCCC and GVA NI, a workshop was held in Lisburn in order to understand the demand (mainly qualitative but touching upon the quantitative aspect also) for office accommodation within the LCCC area. This workshop was followed up with further informal discussion with Regus NI (to better understand the requirements of start-ups and rapidly changing organisations including the impact of co-working and serviced offices on the wider office landscape within Northern Ireland). Similarly, a detailed conversation was conducted with the Strategic Investment Board to understand the requirements of major inward investors and the options presently available in Northern Ireland for the government to work with local authorities, including the potential of larger government organisations to relocate to out-of-town locations.

A simple, static **demand** v **supply** analysis implies that, given the number of properties presently for rent within the LCCC area, there is an over-provision of office accommodation. However, our central thesis is that while this might reflect previous working patterns it is not representative of how demand might present itself in the future, in other words how current provision is equipped to support new types of organisation and new ways of working. The challenge was therefore to identify where gaps currently lie in terms of location and quality of modern, flexible accommodation.

A table of **haa design**'s activity in respect of preparing this report in contained in Appendix 3.

4. BACKGROUND INFORMATION

4.1 POPULATION FORECAST

The March 2017 LCCC Preferred Options Paper (POP) gave a projected population increase between 2015- 2030 of 18,413 or a growth rate of 13.1% (based on 2014 population predictions published by NISRA). The corresponding data[5] for the period 2016-2031 shows a slight decrease in the above prediction, with a growth rate of 12.1%, however, this difference is not significant. Over this 15-year period, the percentage of working age population within LCCC is predicted to remain steady (62%) while the percentage of children is predicted to drop from 20% to 18.2% with a corresponding increase in people of pensionable age (from 18% to 19.9%). This is broadly in line with NI-wide predictions. Given that there are minimal changes to the market anticipated, it is assumed that the business sector will continue to grow in the Council area in line with these projections.

4.2 ECONOMIC TRENDS

The latest statistics available from NISRA[6] indicate that **LCCC is above the Northern Ireland average when it comes to both the economic activity rate** (77.6% compared to 72.3%) **and the employment rate** (75.9% compared to 69.0%) for adults in the age group 16-64.

In terms of the wider Northern Ireland economy, there are obviously two main factors that need to be borne in mind when making predictions:

(1) the ongoing uncertainty over the Brexit negotiations and the implications that any deal will have on Northern Ireland and
(2) the lack of a sitting government at Stormont.

The difficulty in gaining up to date economic information is that most information available in Northern Ireland relates to Belfast often resulting in little relevant information available relating to the LCCC area on a routine basis. Invest Northern Ireland previously published an annual briefing on activities within their different areas (LCCC lies within their Southern Region). The latest information is contained in the July 2018 documents (now published individually for each council). The benefit of such documents is that they provide a quick comparison between LCCC and neighbouring councils (Ards & North Down and Newry, Mourne & Down). In this respect LCCC is generally performing well in relation to the Northern Ireland average and in some areas better, some areas worse than their neighbours. A high-level comparison is included in Appendix 4.

4.3 GENERAL

From the Preferred Options Paper, the employment target is for the creation of 6,500 jobs by 2030. However, this is based on the land available for 'employment / industry' which relates to the uses associated with the Planning (Use Classes) Order (Northern Ireland) 2015 Part B Industrial and Business Uses.

Planning Policy Statement 4 Economic Development states under Policy PED 1 that Class B1 Business use i.e. use:

a) as an office other than a use within Class A2 (Financial, Professional and other services);
b) as a call centre; or
c) for research and development which can be carried out without detriment to amenity by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit.

should follow a sequential approach with only certain areas identified in the Development Plan for class B1(a) uses.

5 https://www.nisra.gov.uk/publications/2016-based-population-projections-areas-within-northern-ireland

6 https://www.nisra.gov.uk/publications/labour-force-survey-tables-local-government-districts-2017

It is understood that the Council is carrying out a separate ‘Employment Land Review’ identifying the supply and distribution of land for employment purposes as defined under PPS 4. This Office capacity study focuses on office types A2 (city & town centres, district and local centres) and B1 (a).

5. ANALYSIS OF EXISTING SUPPLY

5.1 SUPPLY

Quantifying supply is a straightforward, if laborious, process that relies on a combination of desktop research and 'on the ground' validation of 'test samples'.

5.2 METHODOLOGY FOR QUANTIFYING SUPPLY

Rating information for all properties (domestic and non-domestic) is generated by Land & Property Services (LPS), with the data thereafter able to be filtered according to the Primary Class of "*Offices (includes Banks and Post offices)*".

INITIAL DATA	CONVENTIONAL	CONVERSION	FORMER DWELLING	N / A	OTHER	PURPOSE BUILT	TEMPORARY DWELLING
Ward	Entries for Database 1						
Ballinderry	2		2				
Ballyhanwood	1						
Ballymacash			2				
Ballymacbrennan	5			2			
Ballymacoss			1				
Beechill	40	1	5		19		
Blaris	15		6	1			1
Carrowreagh	35	1	1		3	1	
Carryduff East	16		3	2	1		
Carryduff West	3		2	1	4		2
Derryaghy	12	1	1	1			
Dromara	1		3				
Drumbo		2			1		
Dundonald	1				2		
Galwally	8		1		1		
Glenavy			1				
Graham's Bridge	3		2				
Harmony Hill	1						
Hilden	72	6	22	4	2		1
Hillhall	1		1		4		
Hillsborough	7	1	13		4		
Knockbracken	3	1	1		2		
Knockmore	35	7	6	1	6		
Lagan	7	2	12	1	2		
Lagan Valley	2	1	1		1		
Lambeg			3				
Lisnagarvey	15				1		
Maze	6	1					1
Moira	5		9		3		
Moneyreagh	3	1			2		1
Newtownbreda	9		3		1		
Old Warren	7		3		3		
Ravernet		2	1				
Wallace Park	39	1	14	1			

FILTERED TO MATCH DRAFT BMAP 2015	CONVENTIONAL	CONVERSION	FORMER DWELLING	N/A	OTHER	PURPOSE BUILT	TEMPORARY BUILDING
Ward	Entries for Database 2						
Beechill	10	1	4		19		
Blaris			4				
Carryduff East	6						
Carryduff West	3		2	1	4		2
Dundonald	1						
Galwally	2						
Graham's Bridge	2		1				
Hilden	72	6	20	4	2		1
Hillhall					1		
Hillsborough	7	1	13		4		
Lagan	2	1	12		2		
Moira	5		9		3		
Newtownbreda	1						
Wallace Park	26	1	13				

Fig. 1 Breakdown of the database entries per ward for the initial and the final

The data provided by LPS to LCCC was subsequently filtered by the council to match those areas contained within the Draft Belfast Metropolitan Area Plan (BMAP) 2015 (see Appendix 1, p.37) taking into account all local government boundary changes. The database supplied to the consultant team contained 268 entries, listing the address as well as (in the majority of cases) a unique property identifier known as the UPRN[7].

The UPRN was entered into a search function on the LPS website[8] which allowed the office area in question to be extracted, as well as the floor level and the ratable value per m^2. While the UPRN uniquely identifies a property, it does not always refer to a single office. In some instances, a property contains numerous offices each with their own UPRN; alternatively, a single UPRN corresponds to several offices within the same property.

[7] The Unique Property Reference Number (UPRN) is a nine-digit number generated by LPS corresponding to each database entry.

[8] https://apps.spatialni.gov.uk/LPS/LPSNonDomesticSummaryValuations/index.html

For each entry in our initial database, all the relevant office areas were listed, and totaled at the end of the study. With some of the database entries, while the LPS website listed the UPRN as being under the primary class of offices, the 'use' parameter did not correspond to 'office'. These areas were not included within our office capacity survey.

Additionally, for each database entry an image of the accommodation has been provided to aid with the analysis of the **quality** of the accommodation. The survey was split into to the different electoral wards; an initial analysis of the database based on the 'type' of office (e.g. former dwelling, conventional, temporary building etc.), highlighted some discrepancies in the LPS data.

The far more challenging task when performing the survey was then to assign a **quality** to each of the entries. To this end, our colleagues at GVA NI devised a simple scoring mechanism, which evaluated each of the entries accordingly and then, taking a sample group, performed a more in-depth analysis to validate their initial findings. The catalogue of results can be viewed in Appendix 1, with the scoring located beside each entry.

HILDEN: TOTAL ENTRIES IN DATABASE (105)

40

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
1	185265525	72 Chapel Hill, Lisburn BT28 1BW	Convention.	171.20	55.00	1F	4	3	3	2	3	3
2	187575210	Unit 38, Bow Street Mall, Lisburn BT28 1BN	Convention.	149.80	82.50	1F	4	3	3	2	3	3
3	185810786	15A Chapel Hill, Lisburn BT28 1EP	Convention.	34.60	55.00	1F	4	2	2	2	2	2.4
4	185266057	15 Chapel Hill, Lisburn BT28 1EP	Convention.	14.60	55.00	1F	4	2	2	2	2	2.4
5	187531718	12 Bow Lane, Lisburn BT28 1FL	Convention.	7.78	90.00	1F	4	2	3	1	2	2.4
				13.19	90.00	1F	4	2	3	1	2	2.4
6	187141422	31 Antrim Street, Lisburn BT28 1AU	Convention.	496.20	82.50	1F	4	3	3	2	2	2.8
				471.63	103.13	GF	4	3	3	2	2	2.8
7	187594568	6 Bow Lane, Lisburn BT28 1FL	Other	41.80	90.00	1F	4	2	3	2	2	2.6
				24.27	90.00	1F	4	2	3	2	2	2.6
8	187141280	Ground Floor Office C, 68 Bow Street, Lisburn BT28 1BN	Convention.	55.41	93.75	GF	4	2	2	3	3	2.8
9	185265335	Offices Car Park, 68 Bow Street, Lisburn BT28 1AL	FD	40.15	93.75	GF	4	2	2	3	3	2.8
				82.49	67.50	1F	4	2	2	3	3	2.8
				24.30	93.75	GF	4	2	2	2	3	2.6
				95.04	50.63	2F	4	2	2	3	3	2.8
				15.03	84.38	GF	4	2	2	2	3	2.6
10	187568972	6C Market Place, Lisburn BT28 1AN	Convention.	137.62	78.65	1F	4	2	2	3	2	2.6

Fig. 2 Example of a survey sheet from the catalogue of offices.

A discussion and analysis of the **quantity** and **quality** of office accommodation is given on pp. 12-17.

5.3 SCORING CRITERIA

In terms of criteria, the consultant team are mindful that the end user for any of the office properties surveyed could range substantially in terms of size (from 1 person to 100+ persons office) and in function (back office of high-end client, public-facing etc.). With this in mind, high (5), mid (3) and low (1) scores are defined as follows:

Location

- 5 – excellent location suitable for a wide range of occupiers and users
- 3 – average location, likely to suit local users only
- 1 – poor location with appeal limited to a narrow base

Quality

- 5 – modern, 'grade A' specification property
- 3 – average quality which could be used by the market with limited / cosmetic works only required; no modern facilities such as passenger lift, air conditioning etc.
- 1 – poor quality with major work required to bring this up to a reasonable condition, and no modern facilities as per 3 above

Parking

- 5 – good availability of parking including on-street parking outside the premises, and/or the availability of free or low-cost large car parking in close proximity
- 3 – average availability of parking outside the parking and / or availability of large commercial car parks in the vicinity
- 1 – limited or no parking outside the subject property, and / or only commercial car parks in the vicinity

Flexibility

- 5 – premises likely to be adaptable for a user with at least 5 staff and likely to accommodate the requirements of corporate and small office requirements
- 3 – premises which meet only one of the above criteria
- 1 – premises which meet none of the above criteria, and therefore likely to be suitable for less than 5 staff only

Working Environment

- 5 – desirable environment / location (immediate and wider surrounding) which would also be attractive to a wide range of end users
- 3 – only 1 of the above criteria met, i.e. either desirable location or attractive to a wide range of end users
- 1 – none of the above criteria applies, and environment is therefore limited in terms of desirability and attractiveness

As stated previously, the relative simplicity of this technique relied upon the experience of the local GVA team and their understanding of the current office market within the LCCC area.

6. ANALYSIS OF ACCOMMODATION

The **total office accommodation**, according to the entries in the filtered database, and using the methodology presented above, is **36,960.07m^2** (gross area); this corresponds to 352 locations / properties where the use is listed as office. By way of comparison (Appendix 1, p.34), information provided by LCCC from the Department for Communities gives a total office area of 47,401m^2 from 183 properties, but there is no further information available to qualify what area the 'Lisburn' refers to. (Note: as discussed previously, a property can have multiple entries in the database).

The first comment to make on the survey is with regard to what is **not included** within the catalogue of offices that has been assembled. By specifically filtering for those areas within the draft BMAP 2015 boundaries (taking account of revised Local Government boundaries) there are significant locations (with correspondingly large office area, some of a high quality) that have been excluded.

For example, The Sidings (c.1,800m^2 of available office space) and Moira House (c.2,500m^2 of available office space) do not lie either within Lisburn City Centre nor within the proposed extension to the City Centre. Similarly, Forest Grove and Beechill Business Parks lie outside the currently-designated (and potentially extended) Forestside District Centre.

The current Health Centre in Lisburn (25 Linenhall Street) is categorised in the LPS database with the Primary class of *Offices (Includes Banks and Post Offices)*, but with a Sub class and Type as *Commercial Office* and *Health Centre* respectively. It is noteworthy that this building provides c.4,000m^2 of available office space (plus car parking) and lies within the designated boundary of Lisburn City Centre. The potential for this health centre to be redeveloped into quality office accommodation once the current function moves to the Lagan Valley Hospital site in 2021[9] requires further investigation.

Appendix 1, pp.76-83 covers some of the most significant 'outliers' (as suggested by GVA NI) with a total office accommodation area in excess of 13,000m^2. (These offices have not been scored as part of our analysis but are included for completeness). That is to say, the true scale of office accommodation across the LCCC area but lying outside the draft BMAP 2015 boundaries is not clear.

6.1 HIGH-LEVEL ANALYSIS – BY ELECTORAL WARD

The chart (below, Fig. 3) presents the breakdown of total office area by electoral wards.

The available office accommodation is heavily concentrated in certain wards with four of the wards making up c.85% of the total area. Additionally, in one ward (Hillhall) the office area is comprised of only one building (the council's Lagan Valley Island Centre at c.8,500m^2).

Hilden ward contains a significant number of larger offices within the City Centre including the available office space (c.1,000m^2) within the same building as the Housing Executive (on Antrim Street), Bow House (c.1,900m^2) on Bow Street and c.1,000m^2 of space within Linen Hill House (the library building). At the other end of the scale, certain offices within the Bow Lane Business Centre are individually less than 20m^2.

The only significant office provision outside of the greater Lisburn City area is located within the Beechill ward (i.e. Knockbracken Healthcare Park) with a total of c.5,000m^2. Both Carryduff West and Hillsborough have c.1,600m^2 available, with the latter having approximately double the number of entries. At the other end of the spectrum, Dundonald ward has only one entry – a single office of area 11m^2.

[9] https://www.belfasttelegraph.co.uk/business/northern-ireland/kajima-uk-and-northern-ireland-firms-land-40m-health-centre-contract- 37428134.html

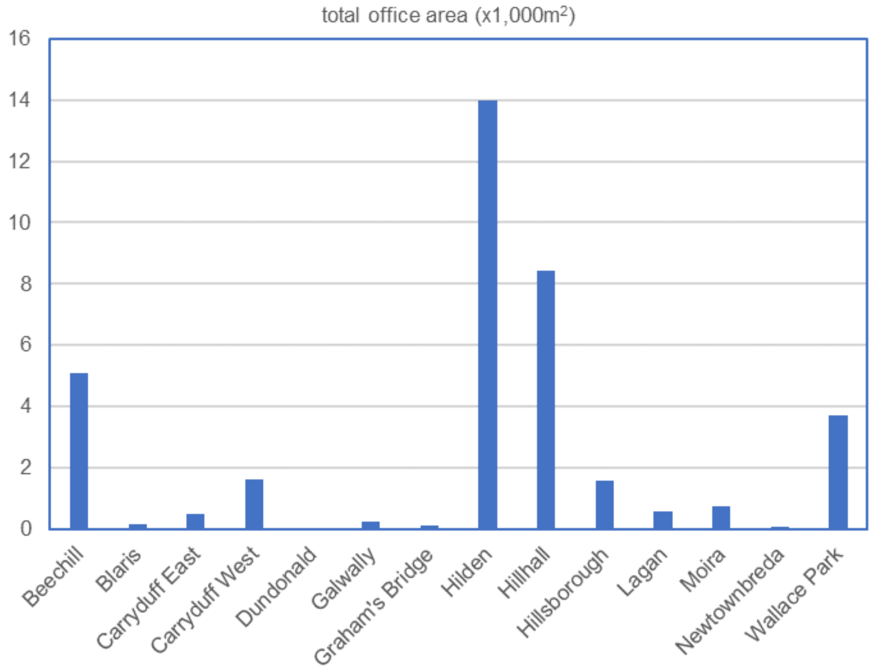


Fig. 3 Breakdown on total office areas by electoral ward.

6.2 HIGH-LEVEL ANALYSIS – BY OFFICE SIZE

Eliminating the entries where the use is not currently listed as 'office' and recording the areas from properties with multiple offices, there is a total of 352 separate office spaces, split as follows:

area (in m^2)	0-25	25-50	50-100	100-500	500-1000	1000+
# of spaces	69	102	115	55	6	4

The average office area within our survey of 352 entries is 105m^2, with the smallest individual space technically listed as an office in the LPS database at 2.84m^2. The largest single office space is within the Lagan Valley Island Centre, where the 1st floor offices comprise 2,460m^2.

The survey data (table below and Fig. 4) shows that there is a scarcity of offices with areas in the ranges 500-1000m^2 and upwards of 1000m^2. The chart (below) shows the breakdown of offices by size in the different wards.

Using 'typical' workplace space standards for modern offices (c.10m^2 / person gross), the above space ranges can be converted into an 'able to support' staffing number as follows:

area (in m^2)	0-25	25-50	50-100	100-500	500-1000	1000+
staff numbers	0-2	2-5	5-10	10-50	50-100	100+

The high proportion of small offices (area less than 50m^2) implies a high proportion of office use is for micro-enterprises. These figures back up our on the ground research of office accommodation gained during several visits to the Lisburn area.

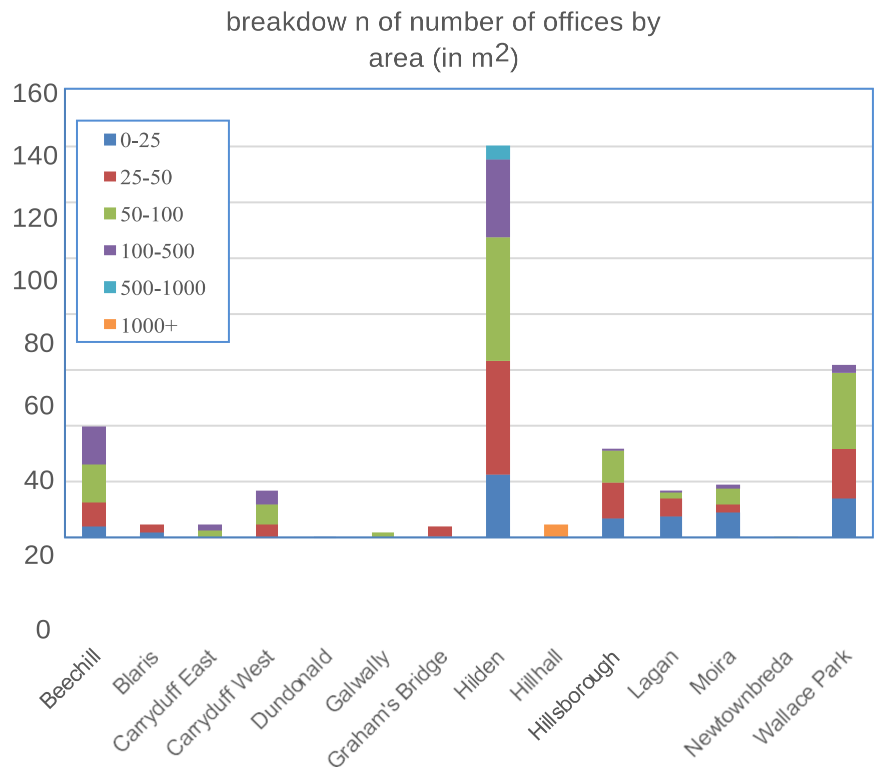


Fig. 4 Number of office spaces within 'area bins' broken down by electoral ward.

6.3 HIGH-LEVEL ANALYSIS – BY OFFICE OVERALL QUALITY

As discussed, the scoring of office quality is somewhat **subjective** and, with no weighting of the individual criteria, the simplest method of getting an overall quality is to take an average of the 5 individual scores. The chart below (Fig. 5) shows the aggregated results for all the individual offices in our survey and shows that, taken as a whole, the peak (according to a 2nd order polynomial trend line) is just to the high end of 'average' (i.e. slightly above 3).

The overall quality of the most populous wards in terms of entries have been plotted separately in Fig.6a. The number of high-quality offices, with an average overall score of 4 or higher, however is very limited.

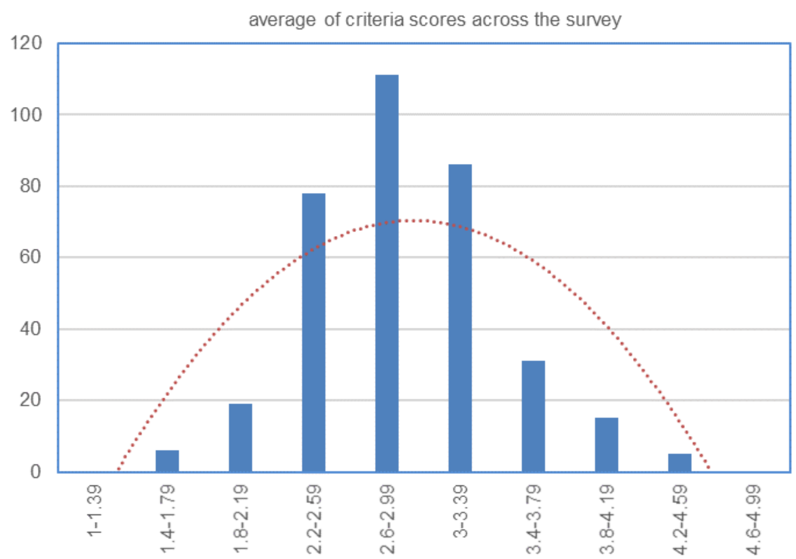


Fig. 5 Number of office spaces within overall quality 'bins'.

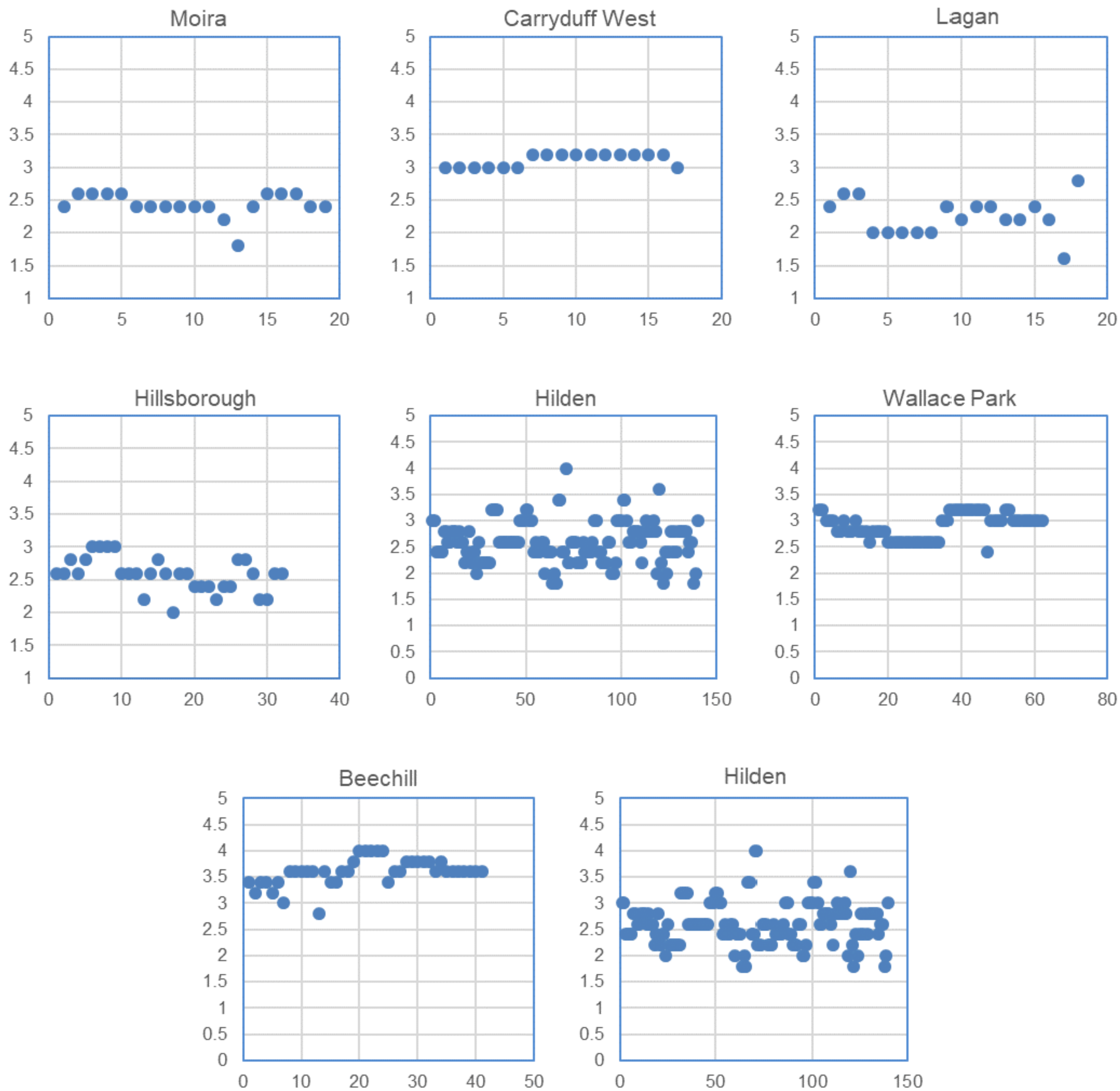


Fig. 6a Overall quality for the office spaces in the most populous wards (in terms of entries).

The council offices in the Hillhall ward have been split into five individual office spaces, though they technically constitute one building. Within Hilden ward, the main office space that would be considered high quality is the c.1,100m^2 office with raised floor / suspended ceiling etc. at 23 Linenhall Street (the library building).

In general, and, as expected, given its location, the distribution of quality within Hilden ward is the highest. From our analysis there are two offices that score highly within Forestside Shopping Centre, though how practical these are for wider use is debatable. Within Knockbracken Healthcare Park (Beechill ward) there are several buildings that could be considered as being of a sufficiently high quality. Within Wallace Park ward, there are several offices that on the surface appear to be modern and of a high quality (Wallace Studios) but score below average in terms of flexibility due to their size. (see Appendix 1 for a breakdown of the scores).

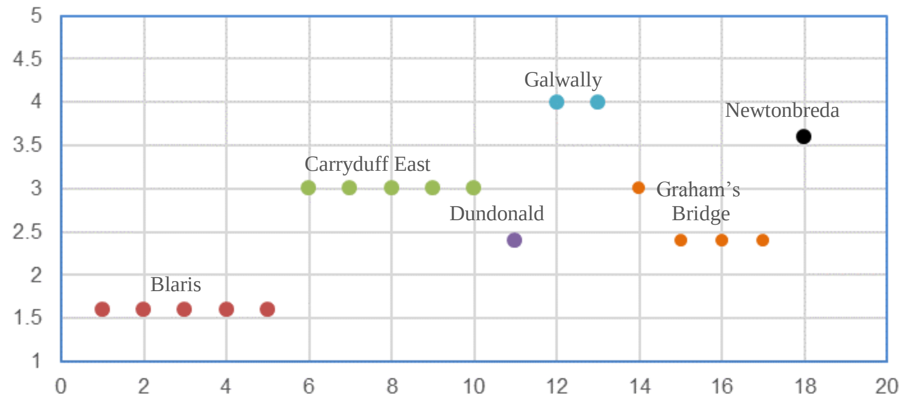


Fig. 6b Overall quality for offices spaces within the 'smaller' wards.

What is noticeable from looking at the remainder of the wards is that the overall quality of the office accommodation is poorer in the settlements outside of Lisburn (with those offices in Lisburn, that are classified as former dwellings, similarly scoring poorly).

6.4 HIGH-LEVEL ANALYSIS – SUITABILITY FOR MODERN FLEXIBLE WORKING

From our discussions and background research, the size of modern, flexible office space and starter units in particular, tends to be in the 250-500m^2 range; large enough to accommodate a range of work spaces, meeting spaces and social / support spaces.

However, as already discussed, some of these spaces, such as co-working spaces, also set themselves apart by their location (close to transport links) and with excellent amenities (such as cafes, restaurants etc.) on their doorstep.

Different locations within the Knockbracken Healthcare Park (Beechill ward) have the major advantage of buildings with the appropriate size of spaces (and buildings with their own distinct character), as such a large- scale business use such as research and development would be preferable in this location. Agar House in Carryduff has potential since it is well-served by public transport; the possible redevelopment of the Carryduff Centre might either serve to support modern working as described above within Agar House or provide an opportunity to be the location for the 'modern' working space itself.

Within Lisburn City Centre (Hilden ward) there are several locations where a 'modern' co-working space would not be inappropriate, i.e. offering the correct size of space and with the range of amenities desired.

For example, the 31 Antrim Street office is a relatively effective building in that it is naturally-ventilated, with a public car park adjacent and within 5 mins walk of bus and rail links. Similarly, 29 Railway Street, though it is an older building with its own character, is similarly well-located for transport and amenities. Lisburn Square is probably the most attractive option for 'co-working' within Lisburn *per se* as it is a prestigious address within the city. For start-ups and growing organisations, image and the appearance of the space is very important. The office space at 1 Sackville Street is of reasonable quality while technically still within Lisburn City Centre, although slightly more remote from the city centre core. The spin-off opportunity of a start-up / incubator type space is that these typically do not operate on a traditional 9-5 basis and therefore have the chance to play a vital role in a wider 'regeneration' strategy.

Fig. 7 (p.17) summarises some of the key locations in tabular form with comment on the suitability for modern flexible workspace.

ward	address	area* (m^2)	suitability
CARRYDUFF WEST	Unit 4, Agar House, 31 Ballynahinch Road, Lowes Industrial Estate, Carryduff, BT8 8EH	362.50	YES (good location, less amenities

BEECHILL	301-13 Ambulance Station, Knockbracken Healthcare Park, Belfast BT8 8BH	254.90	MAYBE (outside designated centre & lesser amenities)
	Clady Villa, Knockbracken Healthcare Park, Belfast BT8 8SG	321.00 398.00 376.00	MAYBE (outside designated centre & lesser amenities)
	Unit 1 Dorothy Gardiner Building, Knockbracken Healthcare Park, Belfast BT8 8BH	322.00	MAYBE (outside designated centre & lesser amenities)
	Unit 2 Graham House, Knockbracken Healthcare Park, Belfast BT8 8SG	250.34	MAYBE (outside designated centre & lesser amenities)
	Unit 1 Donard Building, 301K Saintfield Road, Belfast BT8 8BH	291.64	MAYBE (outside designated centre & lesser amenities)
WALLACE PARK	Unit 3 & 4, 1 Sackville Street, Lisburn BT27 4AB	313.20	YES (city centre)
HILDEN	31 Antrim Street, Lisburn BT28 1AU	496.20 471.63	YES (city centre)
	29 Railway Street, Lisburn BT28 1XP	242.30	YES (city centre)
	Lisburn Suite, 33 Lisburn Square, Lisburn BT28 1TS	293.30	YES (city centre)

*for many of the entries there are other spaces in the buildings currently in use as offices

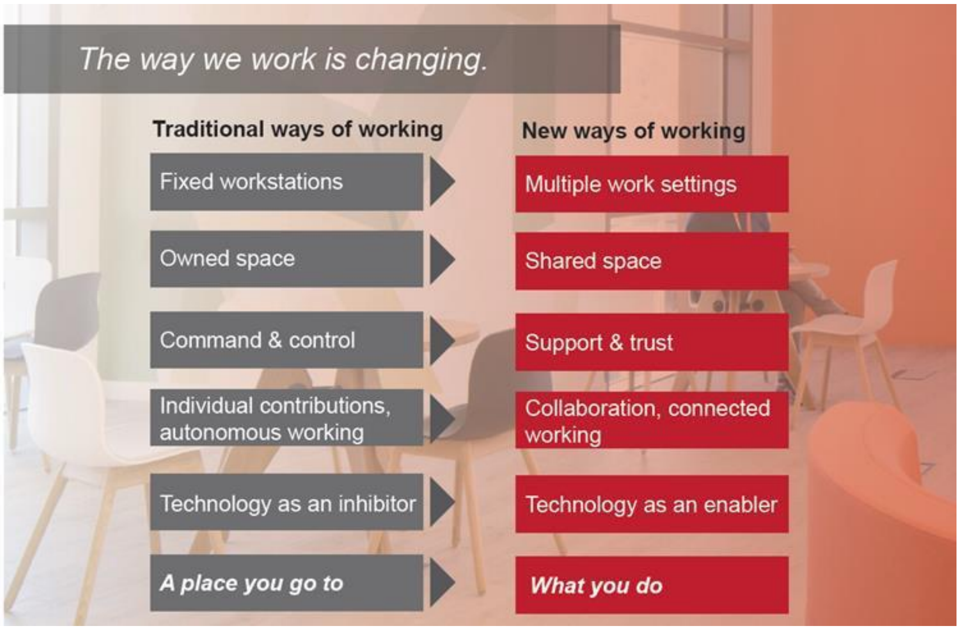
Fig. 7 Analysis of individual locations for flexible working offices.

7. ANALYSIS OF EXISTING AND POTENTIAL DEMAND

7.1 BACKGROUND INFORMATION – NEW WAYS OF WORKING

The evolution of the office / workplace has reflected ongoing societal change and the increasing power of the employee; the workplace has also been transformed by advances in computer and communications technology.

Of the three different themes **people**, **place** and **technology** it is safe to say that it has been the incorporation of modern technology in the workplace that has had the biggest influence and has been a key driver in the implementation of new ways of working.



technology
the ability to work from anywhere, be that conventional desk or coffee shop table, has been made possible through computer technology becoming lightweight and portable and through data becoming accessible remotely.

people
home-working and condensed hours are part and parcel of the modern workplace and the move away from the 9-5 job, as well as legislation and employee aspirations, have shaped workplace policies.

place
with a more mobile workforce, increased opportunities for social collaboration and jobs that benefit from a range of worksettings to support different work modes, the modern workplace has been transformed from a rigid and hierarchical layout to a more flexible, more engaging environment.

What is clear from research of current workplace trends is that a modern, well designed working environment can be a differentiator, assisting with staff recruitment and retention. Employee aspirations have changed (and not just for 'millennials') with themes such as staff **wellbeing** and **engagement** becoming more important.

For organisations, the modern workplace is increasingly having to do more, in a smaller space. The concept of 'the more you share, the more you get'[10] has paved the way for 'flatter' corporate structures where the importance of **status** is gradually being eroded and the importance of **results** is key. In terms of the physical

[10] Kirsty Lang, Graven, Registers of Scotland / St Vincent Plaza project (2017) – https://vimeo.com/263472616.

workspace, this is becoming very obvious with the removal of owned offices within many organisations and the proliferation of both collaboration and concentration spaces.

7.2 BACKGROUND INFORMATION – MODERN OFFICE LOCATION DIFFERENTIATORS

- **infrastructure**
  - this relates primarily to ICT but will relate to the several other factors affecting **flexibility**, including:
    - ventilation strategy
    - modularity
    - sub-divisibility
    - building (Mechanical & Electrical) services, generally, including riser space.
- **efficiency**
  - this is of importance where rental costs are high, which in the case of LCCC is not currently of most importance.
- **floorplate size & configuration**
  - this can relate to both flexibility and efficiency but, with the exception of major space users, the inherent ability to grow and change that this implies can sometimes be offset by the availability of other adjacent spaces. This gives rise to:
- **'clustering'**
  - since the hallmark of progressive companies is that they grow and change, then the ability for them do this without disturbing staff, client and associate business accessibility is critical. A collection of building space types in the same location is therefore very much more attractive that 'good' space set apart by itself
  - the tendency for like-minded organisations to co-locate has been long-appreciated. This is even more critical to growing organisations where the swapping of staff is ultimately more of a critical asset than a threat.
- **amenities**
  - 'lifestyle' used to be considered something frivolous or very secondary to the functional qualities of office space. This is now becoming central to the selection criteria of progressive companies where their ability to attract the best of a growing and talented workforce is critical. Amenities in this respect might relate to:
    - facilities within the 'office' itself ranging from break-out space to changing facilities (the provision of lockers and showers for runners and cyclists is increasingly moving from 'nice to have' to a pre-requisite)
    - facilities within the office 'campus' including quality eating facilities and gyms
    - facilities reasonably adjacent including the above, and green, open-space, entertainment and shopping facilities, or specialist business facilities like conference space.
- **accessibility**
  - accessibility by car and the availability of car parking will continue to be a differentiator, irrespective of the increasing importance of a green agenda or until such times as there is considerable investment in public transport infrastructure. Where car parking is not possible, excellent public transport is essential, and in both cases, proximity to residential areas is increasingly important. In particular, if there is a differentiator to be made from working in a readily accessible city centre, then ease of getting to and from work has to be at the top of the agenda.
  - it goes without saying that modern office space has to cover for full disabled access.
  - with accessibility goes staff availability and skilled staff availability in particular. This might be related to a neighbouring educational facility, for instance, or the availability of attractive residential space.
- **wellbeing**
  - similar to 'lifestyle', quality of internal and external environment is becoming a key differentiator in the provision of office space and an organisation's ability to attract and retain a quality workforce. Linked to this is the issue of **sustainability** which is moving from being a suitably responsible differentiator to a statutory requirement.

- **flexibility of lease**
  - institutional, full repairing leases are almost a thing of the past. Increasingly an 'easy come, easy go' type of lease is essential for any organisation that is rapidly changing. The epitome of this is that which is increasingly offered by 'serviced office' providers such as Regus and their 'co-working subsidiary Spaces.
- **image**
  - image has always been important to organisations, but the type of image considered desirable is changing. Thus, qualities such as 'progressive', 'technological', 'green' etc. are more likely to be attractive than 'corporate' or 'traditional'. Ironically, converted warehouses or other such 'alternative' office spaces can suit a progressive organisation as much as a new build development.
- **cost**
  - the significance of rental cost has been deliberately left until last, not because it is unimportant, but rather because it is changing in importance, with the above-mentioned criteria becoming more important. This is particularly the case where the relative cost of space is not significant, and while Lisburn rents may be in the region of half the headline Belfast rate of £20/ft^2, this financial differentiation is not generally regarded as a determining factor. Recent evidence suggests the financial saving of say £10/ft^2, does not outweigh other decision-making factors, such as the ability to attract staff. This contrasts with locations such as London and Dublin, where the differential between core and secondary office markets is much greater in financial terms.
  - related to cost however is **size** and several of the criteria noted above where, in order for a modern development to be affordable (and for rents to be kept within the same region as elsewhere), developments of a reasonable size are necessary, representing a quantum leap from the size of out of town development that has been identifiable to date.

7.3 BACKGROUND INFORMATION – MODERN WORKING ENVIRONMENTS – A KIT OF PARTS

Regardless of the scale of an organisation or company, there is only a limited number of **working modes** and these generally dictate the number of different **types of space** required**.** The main workplace roles are:

- **process-driven**
  - typically, a fixed desk plus associated technology; it is the 'building block' of most workplaces
- **collaboration-driven**
  - formal and informal spaces to support the creative process
- **concentration-driven**
  - in the knowledge economy there is increasing demand for spaces that provide for a lack of disturbance
- **meeting / presentation-driven**
  - often public-facing spaces that are separated from the other types of spaces

In a modern working environment people use these different types of spaces regularly moving from one to another, often in an *ad hoc* manner, with protocols developed by users to manage space use.

All of this adds up to a demand for a certain **quality** of workspace. In other words, mere m² becomes increasingly irrelevant in terms of being able to meet 'modern' demand.

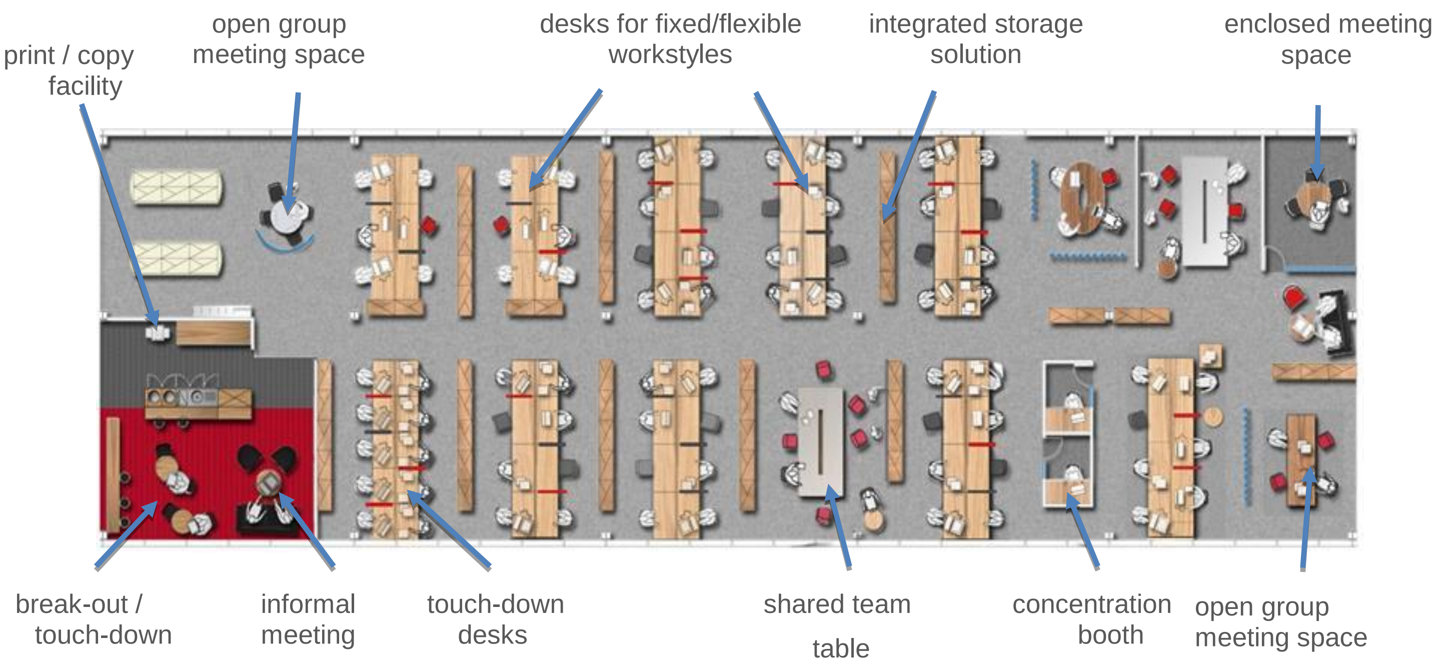


Fig. 9 The modern office comprised of a range of worksettings.

7.4 BACKGROUND INFORMATION – MODERN OFFICE ACCOMMODATION

The examples presented here are indicative of the look and feel of modern offices (though to some extent at different ends of the spectrum), where the **image** presented to the client is all-important.

From our discussions with local (i.e. Northern Ireland) office agents (not restricted to our colleagues in GVA) and from our own recent research on workplace trends, it is assumed that the modern (new-build or refurbished) working environment has as a minimum, first-class staff facilities and data connectivity that is both fast and reliable. Modern office accommodation is all about **quality** and **service**.

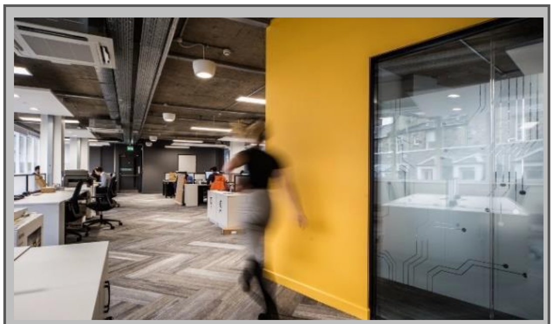
Fuelled by advances in technology, users are making use of office space in radically different ways from the '9-5' desk-bound processing that previously determined the design of most speculative office space. Ironically this means that some smaller floorplate / traditional floorplates might become usable once again, but this is where the other factors such as 'clustering' and surrounding amenities, require also to be taken into account.

The list of differentiators (p. 19) gives an indication of the kinds of factor now seriously affecting the choice of building location, over and above factors such as rental cost, which in the case of Northern Ireland, and referenced in the previous section, does not appear to be a significant differentiator anyway.

Smarter working (e.g. agile working or activity-based working) is therefore significantly different from open plan working or even the kind of touch-down facilities that were considered progressive until now. The new mobility of office work has led to an emphasis on quality and service which is more akin to hotel management than conventional facility management and involves a significantly greater mix of activities and users than heretofore.

Issues such as community, innovation and creativity are increasingly being looked for rather than mere flexibility and efficiency.

It is also interesting to note that within both the public and private sector, office transformation projects are not just being seen as a way to freshen up the working environment but also as an opportunity to assist with the delivery of needed cultural change.



Lorien (Edinburgh)
'small', 'funky'
295m², Tech Recruitment

The brief was to create a more sociable and collaborative environment with a quirky industrial feel in order to attract and retain innovative and entrepreneurial staff.

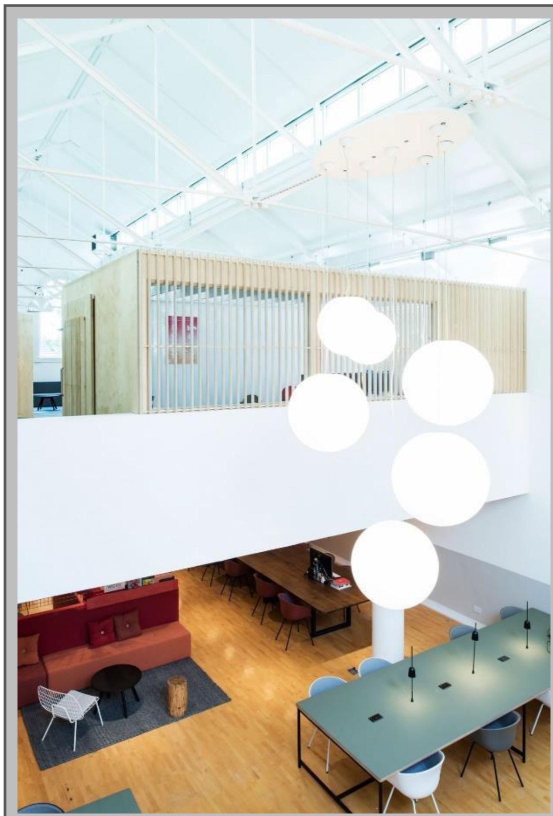
Audit Scotland (Edinburgh)
'medium-sized', 'clean'
1,400m², Government Agency

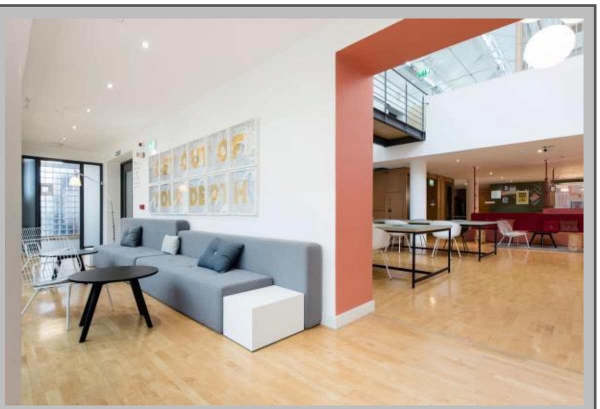
A totally different type of public sector office that helped to deliver the required culture change and supported a far more mobile, more outward-facing workforce.

7.5 BACKGROUND INFORMATION – CO-WORKING

The rise of **co-working** spaces merits specific analysis, insofar as it represents a significant change in working style that is likely to characterise the style of new, progressive organisations and the development opportunities associated with them.

'Co-working' in the form of a more formal type of office illustrated by those provided by Regus (with enclosed offices of different sizes) or the more stylish, informal variety provided by their sister organisation Spaces, where the emphasis is on a younger, more aspirational organisation, is becoming a game-changer for the office sector. The fact that this type of flexible office accommodation is being used by large organisations and even government agencies indicates the scale of this new market and the way that other space is being forced to imitate it (reckoned to be 30% of the lettable London office space).





Case Study – Ormeau Baths, Belfast

Described not only as a 'co-working space' but also as a 'community', this project has revitalised a run-down building, creating a workplace destination where the look and feel is entirely in sync with its users – tech and digital start-ups.

Supported financially by individuals with a particular connection to Northern Ireland, it is designed to provide the type of space and the opportunities for collaboration that the founders (both the individuals and the partner organisations such as Barclays Eagle Labs and Ulster University) see as being essential for the creation of the next generation of entrepreneurs. Ormeau Baths works on the principle of membership, giving users the much- needed flexibility over the type of access they require.

"*Ormeau Baths membership gives entrepreneurs and start-ups a dedicated area within an open plan environment, encouraging collaboration and community but built with privacy in mind and space for each company or person to do their thing. With a growing list of facilities, an onsite coffee shop, meeting room access, first come first serve on our event space and various workshops, Ormeau Baths delivers everything you would expect from Belfast's premier co working space."*

7.6 BACKGROUND INFORMATION – LARGE-SCALE OUT-OF-TOWN DEVELOPMENTS

By definition opportunistic large-scale development sites, likely to be attractive to large-scale organisations, are limited in the council area, and subject to targeted campaigns such as the inward-investment being spearheaded by the SIB and Invest NI. To date these initiatives have focused on the attractiveness of Belfast City itself[11] but there will clearly be organisations where the advantages offered by an out-of-town location may be critical, when the opportunities available within the LCCC area cannot be ignored. Such opportunities are likely to call for significant investment and support at a government level but require to be promoted by LCCC in the first instance.

One particular site, the land surrounding the Maze Long Kesh (MLK) site, clearly falls within this bracket and it is noted that it has previously been promoted through the extant Development plan which designates it as a 'Strategic Land Reserve of Regional importance'. Likewise the Regional Development Strategy (RDS) recognises that the site will enable a mix of uses for major physical, economic and social development of regional significance to be promoted. Due to political and historical reasons there are sensitivities on developing this major site. There are suggestions currently being put forward by SIB as to how it might be further developed.

It is recognised in the Preferred Options Paper, which will follow through to the draft Plan Strategy, that planning policy as contained within the upcoming LDP should encourage economic development opportunities on the site reflective of its scale and central location to the region as a whole. In addition to the economic regeneration opportunities inherent in attracting strategic 'anchor tenants' central to such a project, it should be noted that it is the spin-off benefits to such a project that are possibly most beneficial to LCCC in the longer term, the significant access and technology infrastructure that might be justified, together with the 'clustering' of associated business that is likely to arise.

The other major out-of-town opportunity LCCC have been pursuing for development is at West Lisburn / Blaris. As with the MLK site, access and technology infrastructure improvements are vital to any success.

It is recognised in the Preferred Options Paper, which will follow through to the draft Plan Strategy, that given its strategic location, it is proposed to redesignate this site for Mixed Use, with up to 50% being retained for employment purposes, which will provide a significant boost to this area and support the growth of jobs and homes in close proximity to one another.

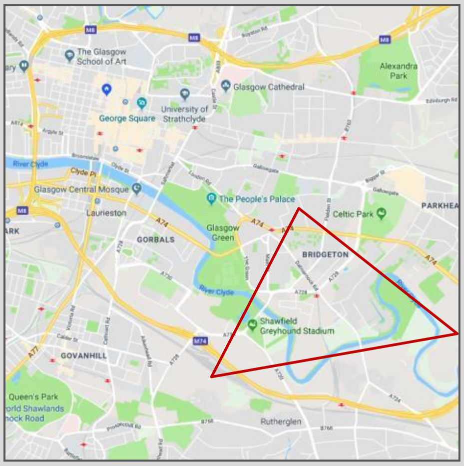
7.7 BACKGROUND INFORMATION – OTHER DEVELOPMENT PRECEDENTS

Regarding LCCC's proximity to Belfast, and the issue of providing a markedly different offering in terms of business opportunity and the potential demand for new and different types of office accommodation, it is worthwhile considering precedents where proximity to major centres or to transport corridors has provided opportunities not possible elsewhere.

The following two examples (in the West of Scotland) are well known to **haa design**, having worked with clients in both locations.

[11] See for example "Global innovation and transformation consultancy firm PA Consulting creates 400 jobs in major NI investment", https://www.investni.com/news/global-innovation-and-transformation-consultancy-firm-pa-consulting-creates-400-jobs-in-major-ni-investment.html

Clyde Gateway



- *joint venture between Glasgow City Council, South Lanarkshire Council, Scottish Enterprise and the Scottish Government.*
- *origins date back to 2004*
- *C.G. formalised in 2007, halfway through a 20-year programme*
- *issues to be overcome:*
  - *contaminated land*
  - *fragmented land ownership*
  - *lack of infrastructure*
  - *lack of demand*
- *2,070 acres within the Clyde Gateway boundary*
- *Councils put the land 'into the pot' for free*

***targets**:*
- *400,000m² of business space – no distinction for office space*
- *21,000 jobs, 10,000 new homes, 20,000 new people*
- *£1.5billion of private sector investment*

***progress to date**:*
- *c.32,000m² of office space delivered*
- *BT prioritised data infrastructure investment – 4th partnership (Scotland)*
- *extensive community consultation – early success cemented the project*

Strathclyde Business Park

- *joint public-private development (1990) situated close to the M8 Glasgow-Edinburgh corridor and M74 Glasgow-South link.*
- *developed on a 155-acre, former coal 'bing' to address the lack of high quality industrial and business accommodation*
- *home to 240 companies employing over 6,000 staff.*
- *hotel, retail, dining nursery*
- *accommodation*
  - *serviced offices from 18m² to over 2,000m²*
  - *flexible contracts*
  - *grade A offices up to 4,500m²*
  - *bespoke D&B grade A offices – capacity up to 7,000m²*
- *world-class data connectivity / parkland setting / security*

key factors:
- *early public sector investment to serve and remediate designated land to make it available for development*
- *early commitment to and continuing investment in speculative development*

***clients**:*
- *from start-ups to 'blue chip' organisations*
- *Virgin Media, Wood Group, Hilton Hotels)*

7.8 BACKGROUND INFORMATION – PROVISION OF OFFICE SPACE IN RELATION TO OTHER COUNCIL PRIORITIES

Provision of the kind of office seen as desirable to an upcoming market does not relate in the main to the infilling of space within existing town and city centres. This is another way of saying that demand relates to some form of 'business park' sometimes seen as working in competition with the city centre.

The case for the provision of a modern business park is not equivalent to out-of-town retailing, namely in that the provision of current 'modern' office space is more likely to be successful if **working in parallel** with the provision of town centre facilities. Inevitably there are development opportunities which exist *at the edge of town centres*, or *even overlapping with such town centres*, adding to the footfall of the facilities within town centres both during 'office hours' and, significantly, beyond the hours of 9-5 when city / town centres such as Lisburn City Centre are urgently in need of support.

With respect to the LCCC area it is the opportunities at the edge of Lisburn city which most obviously fit this description, i.e. West Lisburn / Blaris and enhance the opportunities for mutual growth and success.

7.9 EXISTING DEMAND / POTENTIAL DEMAND

7.9.1 AVAILABLE ACCOMMODATION

As stated previously in this report, it is wrong to imply that the office accommodation that is **currently for rent** means that there is no demand within the LCCC area. It is particularly interesting to note that in May 2018 a desktop study (via www.propertynews.com) determined that c.9,000m^2 of office accommodation was lying empty within the city of Lisburn itself.

This study identified that the available accommodation ranged from that which would be considered as being at the 'poorer' end of the market (i.e. 'above the shop' type offices, area c.20m^2) all the way up to a modern, 'grade A' office space (i.e. raised floors, suspended ceilings, heating, ventilation, and air conditioning systems, area c.1,000m^2), but with significantly more of the former than the latter across the LCCC area.

To understand where the **potential demand** might be coming from, it is important to understand which sectors in Northern Ireland are growing, which sectors have the potential to grow further, and to try to determine what the particular requirements within these sectors are.

Carryduff

Of note is the long-proposed private development of c.1,100m^2 of high-quality office space at Eastbank House, (just off the A24). First proposed in 2015, the development is still listed on commercial agents' websites.

However, it was reported in May 2018 that work was due to begin within several weeks on a private new-build joint facility of c.1,100m^2 for the National Autistic Society of Northern Ireland (NAS NI), who will re-locate from Malone Road in Belfast.

The development will act as the HQ office for NAS NI and also offer full-time care and support services. As reported in the press, this is an unusual new build opportunity and a rare occurrence of an organisation moving out of Belfast.

7.9.2 KEY SECTORS

According to Invest Northern Ireland in their Business Strategy 2017-2021 document[12], the economy in Northern Ireland will continue to build on the strengths in existing sectors (Financial, Business & Professional Services, Advanced Manufacturing, Materials & Engineering, Agri-food, Digital & Creative Technologies, Construction & Materials Handling and Life & Health Sciences) but will seek to gain a foothold and drive the development in those sectors that will provide the greatest opportunities for growth (Cybersecurity, Legal Services Technology, Precision Medicine and Big Data / Internet of Things). What underpins many of the existing sectors and all of those providing opportunities, is the requirement for a **highly educated workforce**, **high-speed data connectivity** and **the ability for people and spaces to respond quickly to change**.

[12] https://www.investni.com/features/business-strategy-2017-2021.html

It is precisely the last requirement (flexible workspaces) that dictates the potential demand for new types of accommodation.

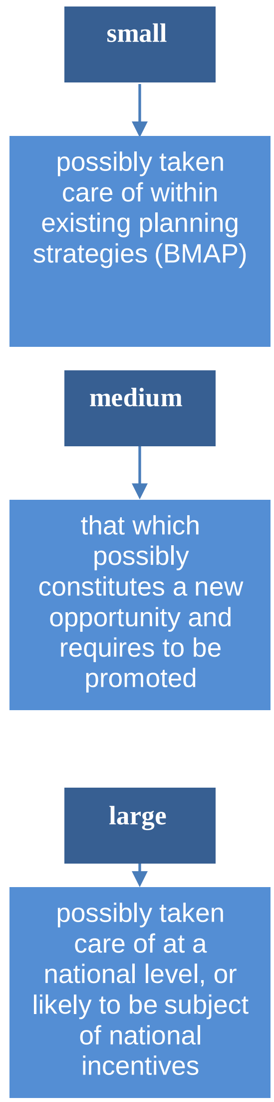
The Belfast Region City Deal Proposal

The importance of 'digital' in Northern Ireland is highlighted in the 2017 Belfast Region City Deal document†[13] which sets out "*an ambitious proposition for how the region can effectively build and share capabilities for digital innovation projects that will accelerate key sectors and support productivity growth across the economy*."

The importance of LCCC gaining at least a proportion of this central government sponsored incentive cannot be over-emphasised and the announcement (1st October 2018) of the proposal to build an Innovation Hub in Lisburn on the South Eastern Regional College campus is welcomed. The facility would undoubtedly bring many benefits to the city and to the wider council area. More background information is included in Appendix 5.

7.9.3 QUANTIFYING POTENTIAL DEMAND

In order to assess the quantity of a **potential demand** the only measure is that of drawing comparison with a roughly similar situation. The fact that no two situations are ever exactly the same is obvious, but even being hugely conservative in the following examples, the conclusion is that a major opportunity exists within the right location outside of the Belfast city area.



As discussed earlier in the two Scottish case studies, markets are stimulated by the provision of better quality, more specialist space of one sort or another – i.e. that with better accessibility, flexibility (of space and for growing organisations, of leases), data infrastructure etc. Who provides that better quality accommodation and where it is located is where the challenge lies.

In trying to assess demand it is important to clarify different scales of development opportunity that might be required. The following gives a summary of the current situation.

small scale

- small scale might be defined as those micro-enterprises that are presently catered for as 'above the shop' offices in the smaller towns, villages and away from the centres of the larger settlements. Any future demand for these types of office will be met by existing supply and there is limited if any requirement for any additional office provision of this size.

medium scale

- an analysis of existing 'available to let' accommodation within the LCCC area, may suggest that there is on first glance no demand that is not being met. However, the recent uptake of space within The Sidings development in Lisburn (a development which falls well short of the full set of criteria listed previously, but relevant nevertheless in the way that it differs from the bulk of otherwise available floor space) would suggest that there is still a demand for the right size, right location and most importantly (since it is our understanding that uptake was influenced by an upgrade to the development) the right quality of office accommodation.

In order to assess the size of this category of development, the following two examples of similar situations have been used:

<u>comparator 1</u>: Glasgow / Clyde Gateway:

- Glasgow v Belfast population (600,000 v 280,000) – i.e. approx. x2 in terms of population
- assume demand scales accordingly (i.e. x2)

[13] http://www.belfastcity.gov.uk/nmsruntime/saveasdialog.aspx?lID=27539&sID=18022

- Clyde Gateway has attracted / delivered c.32,000m^2 of office space in the past 10 years
- therefore, LCCC demand = c.16,000m^2 of high-quality office space within the next 10 years
- this total demand equates to approx. 8 developments of the scale of The Sidings.

comparator 2: Scotland / Strathclyde Business Park

- 130,000m^2 of high-quality office space has been delivered in the past **30 years**
- the park has 1/3rd of the Scottish population within 30 minutes (=c.1.75 million people)
- population within 30 minutes of LCCC area (=c.1 million people)
- potential requirement for office space in Lisburn area (existing and new) = c.75,000m^2
- existing office provision in LCCC area = c.58,000m^2 = survey total of c.37,000m^2 + c.21,000m^2 total contribution from offices outside draft BMAP boundaries (see Appendix 1 for contribution from 'outliers' – assume 50% on top of this number)
- gap in office provision = c.17,000m^2.

large scale

- large scale might be defined as 'campus style' office complexes for large multinational, national or governmental organisations. As referred to previously, the two obvious sites within the LCCC area that have the capacity to support this scale of new development are at West Lisburn / Blaris and the Maze Long Kesh (MLK) site (see section 7.6). Both would require significant infrastructure investment and the latter, because of its historical and strategic importance, would undoubtedly be a matter for central government support and potentially a package of different financial incentives. Minimal transport infrastructure and public access improvements have however taken place at the MLK site in the past few years and the new EIKON exhibition centre offers opportunities in addition to the annual Royal Ulster Agricultural Show.

7.9.4 QUANTIFYING DEMAND – SUMMARY

- demand requires to be seen in terms of **potential demand** not **existing demand**
- **potential demand** also requires to be seen in terms of **quality** not just **quantity**, where the characteristics of 'modern office space' discussed in section 7.2 will be key
- potential demand is only going to be made manifest with the actual provision of the types of office space described. In other words, it involves a degree of entrepreneurial fore-sight on behalf of the private sector and whatever incentives that can be provided by the public sector, for example, rate rebates etc. or investment in the marketing of these opportunities **and the proactive identification of sites. In addition, the creation of more flexible planning policy relating to these sites is worth careful consideration as part of the emerging draft Plan Strategy**
- demand can be categorised as 'small', 'medium' or 'large', where provision for self-contained small units may be considered sufficient: large units are likely to be subject to major national initiatives, and the provision of medium, clustered units of the quality described, most significantly currently does not largely exist
- the quantity of demand of varied and clustered medium office space has been assessed by analogy with similar opportunities to be of the order of 16,000m^2 in the first instance.

8. SUPPLY v DEMAND

8.1 GAP ANALYSIS

If a high-level analysis of potential demand is the first step and the assumption that within the LCCC area c.16,000m^2 of high-quality office space is required, then there are some questions to be addressed:

new-build or refurbishment?
An analysis of the existing office provision has indicated that the general quality is not of a high standard. To meet the demand of modern organisations and their desire for flexibility to extend, there is the option for either redevelopment of existing small-scale offices to create a larger more usable space (within city / town centres) or, **new-build accommodation** at selected locations.

location and scale?
The opportunity for office development to be a part of a wider city centre regeneration strategy implies that a generous supply of the new office requirement should be, for instance, within Lisburn City Centre itself. A previous masterplan of the city centre showed opportunities for transforming the area around Linenhall Street; the scale of the existing library is such that a sizeable office development on that street would not be inappropriate subject to careful design consideration. Within the LCCC area there currently exist numerous small business parks (though none identified within the draft BMAP designations as they are not traditionally industry / employment sites). The Forest Grove and Beechill Business Parks both offer individual office spaces of less than 250m^2 in modern buildings with parking and landscaping. Developments of this scale are ideal for those types of business that have outgrown co-working spaces or who need a more highly-serviced, high-tech working environment (e.g. small-scale R&D) but are not particularly well located compared with the opportunities of building on the centre of activity associated with Lisburn city.

private development or council led or …?
As the cases studies for Clyde Gateway and Strathclyde Business Park show, any development of scale that is intended to stimulate the market relies on public sector intervention of some sort. With Clyde Gateway (CG) the two local authorities involved provided land as well as contributing financially to the set-up costs of CG, with CG being able to respond to problems where the local authorities' could not.

With new developments outside Belfast city centre, the issue of private finance for new-build offices is especially challenging. The lower achievable rents in locations such as Lisburn will impact upon the feasibility of delivering the higher quality specification office spaces that modern organisations are looking for.

Based on an analysis of the type of supply currently existing and the quantity of demand that has been estimated, **haa design** conclude that:

- there is a need **to identify key developmental opportunities for 'edge of town'** business parks (this could be done as part of the more detailed Local Plan Policies)
- there is a demand for **at least 16,000m^2** of **modern office space** in the first instance
- the creation of more flexible planning policy relating to these sites is worth careful consideration as part of the emerging draft Plan Strategy.

9. COMMENT ON EXISTING POLICY / IDENTIFICATION OF SPECIFIC OPPORTUNITIES

Since the primary aim of this study is to inform the LCCC's Local Development Plan, as part of this exercise it is essential to address the current planning policy framework:

9.1 SUMMARY OF EXISTING BMAP FRAMEWORK

The Regional Development Strategy 2035

The Spatial Framework guidance of the RDS 2035 at para 3.36 states the following:

"The urban area of Lisburn benefits from its location at the meeting point of the Belfast/Dublin economic corridor and the east/west transport corridor. … Lisburn has a vibrant city centre with a strong focus on leisure provision, sports and the arts. Potential exists to grow the retail offer and create high quality office offer through the creation of employment in business services. Potential also exists to generate a new driver for the night time economy and to provide a range of flexible commercial accommodation and business parks at development locations such as Blaris and the Maze/Long Kesh."

This view is repeated and reinforced under SFG1 of the RDS as follows:

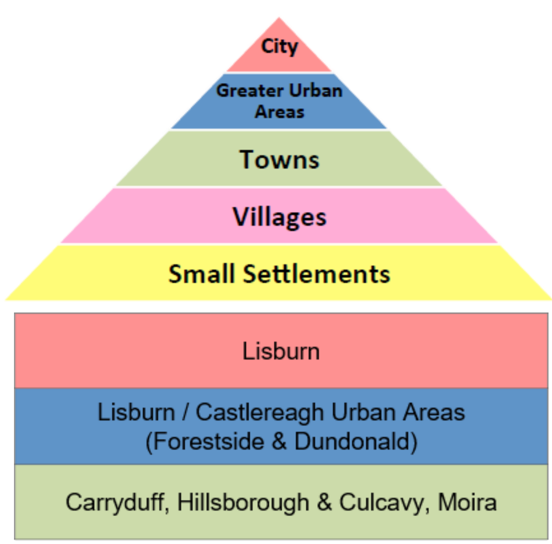
- "Identify and protect key locations for economic growth. This will strengthen the role of the BMUA as the regional economic driver. Major employment/industrial locations in Belfast Harbour Area, (including Titanic Quarter), West Lisburn / Blaris, Purdysburn and Global Point / Ballyhenry being connected to public transport will support the drive to provide a range of opportunities for job creation.

- Enhance Lisburn City as a major employment and commercial centre. Lisburn is strategically located at the meeting of key transport corridors and has high development potential and the scope to generate additional jobs…. Potential exists to grow the leisure offer and create high quality office offer through the creation of employment in business services".

The Strategic Planning Policy Statement for NI (SPPS)

The SPPS places an emphasis on improving competitiveness not only by creating more employment but a rebalancing of the economy. The role of the SPPS is to facilitate the economic development needs of Northern Ireland in a sustainable way. One of the objectives listed is to tackle disadvantage and facilitate job creation by ensuring the provision of a generous supply of land suitable for economic development and a choice and range in terms of quality.

The LDP should therefore offer a range and choice of sites in terms of size and location to promote flexibility and provide for the varying needs of different types of economic activity. Factors which require consideration include, accessibility, connectivity, infrastructure, any specialist requirements and compatibility with nearby uses. One of the ways this can be achieved is by specifying the type and range of economic development uses that will be acceptable within zoned sites…



Draft BMAP

- the BMAP office strategy promotes limited dispersal of major office development to Major Employment Locations at West Lisburn / Blaris and Purdysburn.

- it states that proposals exceeding 5,000m^2 and 3,000m^2 respectively be considered at these locations, if no suitable site can be found within Belfast or Lisburn City

Centre, and would otherwise result in the loss of significant inward investment.

- the strategy promotes office development through the designation of Lisburn City Centre and Carryduff Town Centre where planning permission will be granted for office development within Classes A2 and B1 of the Planning (Use Classes) Order (NI) 2015. No Town Centres are identified in either Hillsborough or Moira.
- the Plan states that a town centre location is not always a prime requirement for certain office users, in particular small-scale firms serving local needs.
- it permits the development of offices up to 400m² gross floorspace within the designated District Centre of Forestside and the designated Local Centre of Dundonald.
- promotion of office development within these areas will support sustainable development, assist urban renaissance and provide jobs in local areas, which are accessible to all sections of the community.

9.2 COMMENT ON SPECIFIC OPPORTUNITIES

Lisburn City Centre
As part of a wider strategy to regenerate the city centre, it is clear from different precedents (e.g. City Quays, Belfast or Timber Quay, Derry) that office development can play a vital role in this respect. Given the conservation status of parts of the centre, there are limitations as to where any office development can take place and to the scale of any proposed new building. Any significant office development will also have to be planned in conjunction with alternative travel opportunities.

West Lisburn / Blaris
From discussions to date it is clear that major development (of any sort) at West Lisburn / Blaris is predicated on the creation of the Knockmore Link road. The current position permits up to 5,000m² of office space which implies a c.500-staff HQ-type building if the capacity is taken up by a single organisation.

Smaller scale developments of different sizes co-located within a business park type environment on this land, where meeting / catering facilities could be shared, would have more appeal and would have a greater likelihood of local Lisburn business being involved in delivering these common services.

Purdysburn & Forestside
The Purdysburn area (incorporating Beechill and Newtownbreda wards) has significant existing office provision (observed via desktop study and an on the ground study). The Newtownbreda office space (within Forestside Shopping Centre, a District Centre) is neither practical nor flexible and several of the larger office buildings in the locale (e.g. Hydebank or the NI Social Security Office off Glencregagh Road) are of poor quality and therefore not suitable for new ways of working and modern organisations. The proximity of amenities at Forestside is appealing for any potential office development, while the location is well-served by public transport. It could be argued however, that the current provision for the size of office space at Forestside (of up to 400m²) is appropriate, with potential development to replace existing offices.

The Purdysburn Major Employment Location at Knockbracken Healthcare Park is a vast complex and in accordance with the extant Plan could physically support 3,000m² of office space without the need to build higher than three storeys. In terms of a pleasant working environment, the generously-landscaped location would be ideal for a large, single occupier office (e.g. a back-office function) where on-site staff facilities might help to promote health and wellbeing. By investigating in more detail the activities that are currently undertaken within the park, synergies with medical and biotechnology R&D may drive smaller developments. Frequent public transport traverses the route, with the Cairnshill Park & Ride also in close proximity.

Carryduff
Carryduff currently has significant office provision (though of limited quality) adjacent to the main road through the town. The news of the imminent re-location of the National Autistic Society of Northern Ireland is welcome and an example of a developer providing modern, high quality office accommodation for a progressive organisation. Additionally, any significant development within the Purdysburn Major Employment Location has the potential to drive further development within Carryduff creating positive spin-offs.

Dundonald

The existing office provision at Dundonald (according to the analysis of the locations within the draft BMAP 2015 boundaries) is non-existent. The proximity of Ulster Hospital might be appealing for healthcare technology or medical services businesses and the imminent introduction of the Gliderbus system provides opportunities for commuters to travel **out of** Belfast to Dundonald. Given both of these and the lack of existing provision, the restriction of 400m^2 for office space at Dundonald may not be considered necessary.

Maze Long Kesh

The Maze Long Kesh site given its significance (and the ability for it to operate on a national level) offers further choice and complements any potential development on the West Lisburn / Blaris lands. To date little progress has been made (apart from limited transport upgrades and the creation of an exhibition centre) on the MLK site in terms of realising the vision for its future use and there is a risk that momentum has been lost.

Moira and Hillsborough

The analysis of existing provision in the Moira and Hillsborough areas highlighted both their importance as a strategic location on the key transport corridor, with distribution companies being located on either side of the M1 motorway and the A1 Belfast-Dublin economic corridor. The typical scale and quality of office accommodation within Moira as well as in Hillsborough / Culcavy appears to cater to existing, and it is assumed, potential demand with conservation area status being of significant importance in both settings.

9.3 GENERAL COMMENT

Zoning – offices or 'offices'

The Crescent Business Park in Lisburn consists of offices, warehouses and workshops, often all within the same unit. As explained previously, the extant Development Plan presently makes a distinction between land zoned for employment and land potentially zoned for offices. The level of flexibility in workspace is such that the difference between an office and a workshop and between a workshop and a warehouse for SMEs[14] is minimal. PED1 of PPS4 currently allows B1 (b) and (c) uses anywhere on existing employment land. A percentage policy based approach for B1 (a) uses on employment land is considered appropriate permitting greater locational flexibility in the office sector.

The current designation of employment land, as being distinct from land suitable for office development, is a distinction that is considered no longer appropriate; Clyde Gateway have for the last 10 years talked of 'business space' without specifying the type of space. It is therefore recommended that placing an upper limit (of circa 10%) on employment land for offices provides the council with far more flexibility than currently provided and does not contradict or go against current central government policy direction (in terms of the Strategic Planning Policy Statement or PPS 4 Economic Development) but rather builds in a small but sufficient degree of flexibility to meet changing circumstances.

Transport

While policy in this area is not in the council's control (and lies within overall responsibility of the Department for Infrastructure, DFI) it has become apparent through research and discussions that transport and car parking is a significant issue in Northern Ireland where public transport provision outside of Belfast can be regarded as limited in parts. As has been discussed throughout this study, the creation of new transport links as well as Park & Ride initiatives have the potential (with careful marketing by LCCC or indeed with the provision of an alternative LCCC-funded service linking a new Knockmore Park & Ride facility with Lisburn City Centre) to reinforce the reality that Lisburn is a desirable place to live and work.

Co-location of Council Services

The model being promoted for the Scottish Government for new council facilities is the co-location of public and third sector organisations (with private sector involvement not being dismissed) as a means of sharing resources and integrating service delivery. Examples such as West Lothian Council's Livingston HQ, where council back-office function shares space with the Police, the Courts and some healthcare functions, are being used as the

[14] An SME is a small or medium-sized enterprise. The main factors determining whether an organisation falls into this category are staff headcount and turnover. In terms of staff, the figure quoted is typically an upper limit of 250 employees.

model for a 'one public estate' programme. There is a significant opportunity for LCCC to drive efficiencies therefore in the provision of its own services at the same time as providing the catalyst form some sort of large-scale development within one of the sites mentioned above.

Such an opportunity in Lisburn for instance to co-locate local public sector functions (e.g. Police Station and Courthouse) is perhaps a longer-term ambition, but is also an opportunity, through a new-build facility, to deliver a different type of service and through the release of existing sites to potentially stimulate new developments.

10. CONCLUSIONS AND RECOMMENDATIONS

The office capacity study undertaken by **haa design** and GVA NI, using a combination of desk-top research and interviews, on the ground surveying and extensive analysis has resulted in a series of key findings.

In terms of **existing supply** there is a total of **36,960.07m^2** (gross area) of office accommodation within the boundary of the draft BMAP (taking into account revisions to Local Government Boundaries). Through a scoring system, it has been ascertained that:

- the number of high-quality office spaces within the LCCC area is very small (<5%)
- the majority of the spaces being of a size and quality to support micro / small enterprises
- the number of larger offices, as with the quality, is also very small
- c.85% of the total office area is contained within four electoral wards, with one ward covering much of central Lisburn (Hilden ward) comprising c.14,000m^2.

In looking at **potential demand**, **haa design** are mindful of trends in the modern workplace and the style of modern working. The rise of co-working over the past few years has been a game-changer for the office sector, with flexibility of leases, high levels of service and guaranteed data connectivity being taken for granted. Using an initiative on the outskirts of Glasgow city centre as a guide, and using a comparison based on scale, the potential demand for new build, clustered high-quality office space within the LCCC area is of the order of **16,000m^2 over the Plan period**.

With reference to the existing policy framework, **haa design** understand that there is significant appetite to do things which are considered appropriate / bespoke for the Council area and to capitalise on the benefit that Lisburn has in terms of quality of life, cost of housing etc. to make it a business destination that is not competing directly with Belfast as the capital city but is working in tandem with Northern Ireland's primary office hub. This undoubtedly provides mutual benefits for all.

haa design therefore recommend that:

- development opportunities such as flexible offices within Lisburn City Centre itself are prioritised (as a means of assisting with the regeneration of the city centre)
- the opportunity provided by the 'edge of town' site within West Lisburn / Blaris is specifically promoted and planning restrictions so defined as to allow for the creation of a high-tech business park with the capacity for at least 10,000m^2 of office space. This is currently identified as 5,000m2 in the existing Development Plan (BMAP). It is considered that the amended figure is more reflective of the position taken in the RDS 2035 and the ambitions of the Council to provide economic growth in this key location
- high-quality small-scale development opportunities with flexible leases are investigated, with locations such as Purdysburn offering the right type of setting for either large, single occupancy offices or smaller R&D-type accommodation that supports the activities within the healthcare park itself. This is currently as 3000m^2 in the existing Development Plan (BMAP). It is considered that this figure of 3,000m^2 is a reasonable quantum of high quality office space in this high-quality parkland setting
- the potential for future development on existing sites at Forestside is further investigated in developing the Local Policies Plan; several large public sector offices adjacent to the centre do not meet the criteria of modern, high-quality office accommodation
- there should be no change to existing policy in the smaller towns and villages; the market here will in essence cater for its own needs and circumstances
- in the longer term, and potentially requiring a concerted approach between central and local government, the opportunity to provide office space within the LCCC area for one of the smaller government agencies (plus touch-down spaces for any government staff) should be investigated in order to reduce overheads, provide a stimulus for local growth and de-centralise influence (subject to mutual agreement)

- office development on ‘employment’ zonings is presently limited. Allowing the council greater flexibility, by developing a policy approach on employment zonings for office development[15], is considered a more flexible and prudent option that would not detract from city/town centres. The Council should therefore consider a policy lead approach to allow for this flexibility.

[15] Class B1(a) of the Planning (Use Classes) Order (NI) 2015

APPENDIX 1: OFFICE CAPACITY CATALOGUE

A1.1 Contents

- background information – ‘Department for Communities’
- office types – high-level analysis
- database entries
    - geographical distribution by accommodation type
- database ‘filtering’
    - by ward
        - scoring criteria
        - ward-by-ward data and scoring
        - summary of areas
        - analysis of accommodation types
- analysis of locations outside the LCCC database

A1.2 Department for Communities information

Information was made available to **haa design** by LCCC that included data for:

- Carryduff
- Lisburn City

within the LCCC area, as well as information for all areas of Northern Ireland that could be used by way of comparison.

Non-Domestic Property Net Asset Value (Rateable Value)								
TOWN CENTRE	**Primary Class**	**Total NAV**	**% of Total NAV**	**Other**	**Industrial**	**Sport / Recreation**	**Freight / Transport**	**Exempt**
CARRYDUFF	Offices	£29,900	17.2%	£14,900	0	0	0	£15,000
LISBURN CITY	Offices	£1,876,660	17.8%	£1,712,160	0	0	0	£164,500

For reference: Belfast City = 44%, Coleraine = 14%, Derry = 30%, Newry = 13%, Omagh = 24%, Portadown = 18%.

Non-domestic Property Vacancy Rates																
ALL NON-DOMESTIC PROPERTIES																
	30-Apr-14		**30-Apr-15**		**31-Dec-15**		**30-Apr-16**		**31-Oct-16**		**7 May 17***		**31-Oct-17**		**30-Apr-18**	
TOWN CENTRE	#	**Vacant %**	#	**Vacant %**	#	**Vacant %**	#	**Vacant %**	#	**Vacant %**	#	**Vacant %**	#	**Vacant %**	#	**Vacant %**
CARRYDUFF (Offices = 17%)	66	18 27.3%	66	20 30.3%	63	20 31.7%	63	18 28.6%	66	19 28.8%	66	20 30.3%	66	21 31.8%	67	21 31.3%
LISBURN CITY (Offices = 18%)	787	174 22.1%	798	190 23.8%	784	179 22.8%	782	181 23.1%	774	167 21.6%	776	173 22.3%	777	172 22.1%	800	184 23.0%

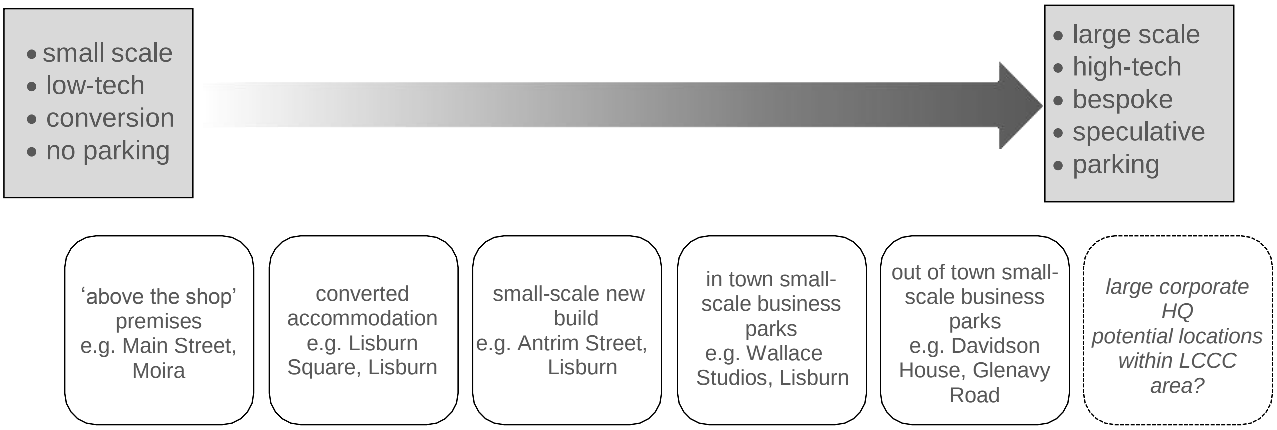
For reference: Corresponding figures for Belfast City = 35.7%, 34.1%, 33.3%, 34.0%, 32.2%, 32.4%, 32.6%, 35.8% with the total number of non-domestic properties = c.5,000**.**

Non-Domestic Floor Space	**Offices**		**TOTAL AREA**
TOWN	**Ave Internal Size**	**Properties**	**(m^2)**
CARRYDUFF	118.03	17	2,007
LISBURN	259.02	183	47,401

For reference: Belfast City = 418.6 / 2,034 = 851,432m^2, Coleraine = 138.8 / 202 = 28,038m^2, Derry = 215.5 / 579 = 124,774m^2, Newry = 166.0 / 328 = 54,448m^2, Omagh = 165.3 / 253 = 41,821m^2.
Northern Ireland = 243.1 / 6,283 = 1,527,397m^2.

A1.3 Office types – high-level analysis

In the Lisburn & Castlereagh City Council area, typical **private-sector** office accommodation ranges from:



In general, **office accommodation** can fall into a range of categories:

- located within business parks
- as 'standalone' corporate HQs
- as part of a hub and spoke model
- as part of a mixed commercial / industrial park
- connected to transport / distribution related businesses
- connected to technology / R&D related businesses
- as spin-off / start-up businesses (often located close to universities)

A1.4 Databases – filtered by LCCC

The table below represents a breakdown of the LPS database as first supplied by LCCC.

INITIAL DATA	CONVENTIONAL	CONVERSION	FORMER DWELLING	N / A	OTHER	PURPOSE BUILT	TEMPORARY DWELLING
Ward	**Entries for Database 1**						
Ballinderry	2		2				
Ballyhanwood	1						
Ballymacash			2				
Ballymacbrennan	5			2			
Ballymacoss			1				
Beechill	4	1	5		1		
Blaris	1		6	1			1
Carrowreagh	3	1	1		3	1	
Carryduff East	1		3	2	1		
Carryduff West	3		2	1	4		2
Derryaghy	1	1	1	1			
Dromara	1		3				
Drumbo		2			1		
Dundonald	1				2		
Galwally	8		1		1		
Glenavy			1				
Graham's Bridge	3		2				
Harmony Hill	1						
Hilden	7	6	22	4	2		1
Hillhall	1		1		4		
Hillsborough	7	1	13		4		
Knockbracken	3	1	1		2		
Knockmore	3	7	6	1	6		
Lagan	7	2	12	1	2		
Lagan Valley	2	1	1		1		
Lambeg			3				
Lisnagarvey	1				1		
Maze	6	1					1
Moira	5		9		3		
Moneyreagh	3	1			2		1
Newtownbreda	9		3		1		
Old Warren	7		3		3		
Ravernet		2	1				
Wallace Park	3	1	14	1			

This database was subsequently filtered by LCCC to correspond to the draft BMAP boundaries (2015).

FILTERED TO MATCH DRAFT BMAP 2015	CONVENTIONAL	CONVERSION	FORMER DWELLING	N/A	OTHER	PURPOSE BUILT	TEMPORARY BUILDING
Ward	**Entries for Database 2**						
Beechill	1	1	4		19		
Blaris			4				
Carryduff East	6						
Carryduff West	3		2	1	4		2
Dundonald	1						
Galwally	2						
Graham's Bridge	2		1				
Hilden	7	6	2	4	2		1
Hillhall					1		
Hillsborough	7	1	1		4		
Lagan	2	1	1		2		
Moira	5		9		3		
Newtownbreda	1						
Wallace Park	2	1	1				

This filtering significantly reduced the number of entries to be researched (from approx. 500 to 268).

A1.5 Comment on accommodation type

As shown above, the LPS database lists the types of accommodation in the following categories:

- Conventional
- Conversion
- Former Dwelling
- N / A
- Other
- Purpose Built
- Temporary Dwelling

Having analysed several entries within the above categories, it was clear that there is a degree of 'mis-reporting' or confusion with some of the categories. In several instances entries within the <u>same</u> building are categorised differently, e.g. Agar House in Carryduff has offices listed as both 'Temporary Building' and 'Conventional'. Whether this is an administrative error by LPS during the data entry phase or an indicator that there is confusion when categorising accommodation is not clear.

Regardless, it was for this reason that an analysis based on accommodation type was not pursued and was subsequently transferred to a location-based analysis, i.e. based on council electoral wards.

A1.6 Scoring of accommodation

The following ward-by-ward analysis is based on information extracted directly from LPS data and provides a **quantitative** measure of the accommodation available.

The entries are appraised on the following criteria:

- **Location (L)**
- **Quality of Accommodation (Q)**
- **Parking (P)**
- **Flexibility (F**
- **Working Environment (WE)**

all graded on a scale of 1-5, where:

1 = very poor
2 = poor
3 = average
4 = above average
5 = good

1	2	3	4	5

and colour-coded for each entry. The scoring methodology and a fuller description of the criteria is presented in section 5.2.

The unweighted average score (**S**) for each entry is also given; it is this average score that is analysed further in the main report.

A1.7 Catalogue of entries

The following pages contain the information gathered from the LPS database and images of each property taken from a desktop survey (via Google Street View).

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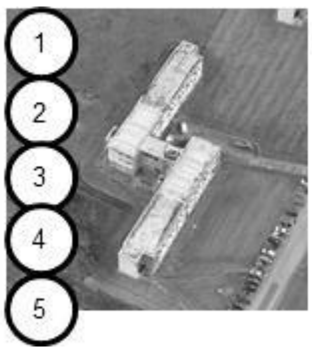
A1.7.1 Beechill

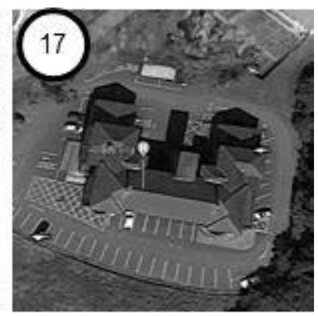
Number of entries: 34 Total area: 5,080.31m^2

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
1	187570425	Unit 5 Slemish Building, KHP, Belfast BT8 8SG	Convention.	102.64	50.00	GF	4	2	4	4	3	3.4
2	187570424	Unit 4 Slemish Building, KHP, Belfast BT8 8SG	Convention.	16.16	50.00	GF	4	2	4	3	3	3.2
3	187570423	Unit 3 Slemish Building, KHP, Belfast BT8 8SG	Convention.	51.49	50.00	GF	4	2	4	4	3	3.4
4	187570418	Unit 2 Slemish Building, KHP, Belfast BT8 8SG	Convention.	84.10	50.00	GF	4	2	4	4	3	3.4
5	187255273	Unit 1 Slemish Building, KHP, Belfast BT8 8SG	Convention.	29.10	50.00	GF	4	1	4	4	3	3.2
6	187255368	Mourne Building (Unit 2), KHP, Belfast BT8 8BH	Other	266.00 116.00	50.00 37.50	1F 2F	4 4	2 2	4 4	4 3	3 2	3.4 3
7		NI Ambulance Service HQ, KHP, Belfast BT8 8BH	Other			Site 30 @ Knockbracken. Double entry □? (Training?)						
8	187678306	301-13 Ambulance Station, KHP, Belfast BT8 8BH	Other	57.30 31.90 92.20 254.90	50.00 20.00 20.00 50.00	1F GF GF GF	4 4 4 4	3 3 3 3	4 4 4 4	4 4 4 4	3 3 3 3	3.6 3.6 3.6 3.6
9	187255403	Piney Ridge Building, KHP, Belfast BT8 8SG	FD	20.00 69.50	15.50 50.00	USE = SMHSE 1F	4 4	4 4	4 4	2 3	3 3	3.4 3.6



Beechill

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
10	185981867	KHP, Belfast BT8 8SG	FD	218.42	50.00	GF (a warehouse?)	4	1	4	2	3	2.8
11	187570339	Unit 6, KHP, Belfast BT8 8BH	Convention.	122.50	50.00	1F	4	4	4	3	3	3.6
12	187570338	Unit 5, KHP, Belfast BT8 8BH	Other	33.80 101.60	30.00 30.00	2F 2F	4 4	4 4	4 4	3 3	2 2	3.4 3.4
13	187570337	Unit 3, KHP, Belfast BT8 8BH	Convention.	65.00	50.00	1F	4	4	4	3	3	3.6
14	185070411	Unit 2, KHP, Belfast BT8 8BH	Convention.	35.40	50.00	1F	4	4	4	3	3	3.6
15		Erne Villa, KHP, Belfast BT8 8BH				Nore Villa (=Unit 6)?						
16	PROP REF = 871674	Unit 1, Foyle Building, KHP, Belfast BT8 8BH		534.00	50.00	NO LPS DATA. Total NAV = £26.7K (rate = £50)	4	4	4	4	3	3.8
17	187255236	Clady Villa, KHP, Belfast BT8 8SG (Education Centre)	Other	321.00 398.00 376.00	50.00 50.00 50.00	2F GF 1F	4 4 4	4 4 4	4 4 4	4 4 4	4 4 4	4 4 4
18	187255400	Wyndhurst Building, KHP, Belfast BT8 8SG	FD	69.20 69.50	50.00 50.00	GF 1F	4 4	4 4	4 4	4 4	4 4	4 4

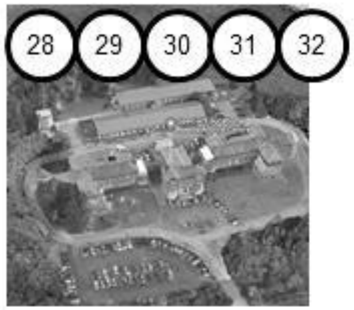


Beechill

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
19	187570316	Unit 2 Dorothy Gardiner Building, KHP, Belfast BT8 8BH	Other	55.00	50.00	1F	4	3	4	3	3	3.4
20	187570297	Unit 1 Dorothy Gardiner Building, KHP, Belfast BT8 8BH	Other	322.00	50.00	1F	4	3	4	4	3	3.6
21	187704382	Unit 9 Graham House, KHP, Belfast BT8 8SG	Other	9.81	50.00	GF	4	4	4	3	3	3.6
22	187570302	Unit 13 Graham House, KHP, Belfast BT8 8SG	Other	149.79	50.00	1F	4	4	4	4	3	3.8
23	187570311	Unit 6 Graham House, KHP, Belfast BT8 8SG	Other	80.80	50.00	GF	4	4	4	4	3	3.8
24	187570305	Unit 3 Graham House, KHP, Belfast BT8 8SG	Other	59.55	50.00	GF	4	4	4	4	3	3.8
25	187570303	Unit 2 Graham House, KHP, Belfast BT8 8SG	Other	250.34	50.00	GF	4	4	4	4	3	3.8
26	187570299	Unit 1 Graham House, KHP, Belfast BT8 8SG	Other	90.60	50.00	GF	4	4	4	4	3	3.8
				31.70	50.00	GF	4	4	4	3	3	3.6
27	187610163	Unit 10 Graham House, KHP, Belfast BT8 8SG	Other	27.41	50.00	1F	4	4	4	4	3	3.8

Beechill

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
28	187610158	Unit 4 Graham House, KHP, Belfast BT8 8SG	Other	28.07	50.00	GF	4	4	4	3	3	3.6
29	187570314	Unit 8 Graham House, KHP, Belfast BT8 8SG	Other	14.73	50.00	GF	4	4	4	3	3	3.6
30	187570313	Unit 7 Graham House, KHP, Belfast BT8 8SG	Other	41.87	50.00	GF	4	4	4	3	3	3.6
31	187570308	Unit 5 Graham House, KHP, Belfast BT8 8BH	Other	14.39	50.00	GF	4	4	4	3	3	3.6
32	187570300	Unit 11 Graham House, KHP, Belfast BT8 8BH	Other	68.80	50.00	1F	4	4	4	3	3	3.6
33	187678334	Unit 1 Donard Building, 301K Saintfield Road, Belfast BT8 8BH	Convention.	291.64	80.00	1F	4	4	4	3	3	3.6
34	187595625	Unit 4, KHP, Belfast BT8 8SG	Conversion	28.10	50.00	1F	4	4	4	3	3	3.6



A1.7.2 Blaris

Number of entries: 4 Total area: 151.25m^2

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
1	185261801	3 Ava St, Largymore, Lisburn BT27 5EN	FD	36.10 33.00	56.25 45.00	GF 1F	3 3	1 1	2 2	1 1	1 1	1.6 1.6
2	185261805	1 Ava St, Largymore, Lisburn BT27 5EN	FD	24.70	56.25	GF	3	1	2	1	1	1.6
3	185261868	6 Hillsborough Old Road, Lisburn BT27 5EW	FD	23.60	56.25	GF	3	1	2	1	1	1.6
4	187145176	20 Young Street, Lisburn BT27 5EB	FD	33.85	87.50	GF	3	1	2	1	1	1.6

A1.7.3 Carryduff East

Number of entries: 6 Total area: 506.95m^2

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
1	187394915	Suite 1, Emerson House, 14B Ballynahinch Road, Carryduff, Belfast BT8 8DN	Convention.	104.71	60.00	1F	4	2	3	3	3	3
2	185936688	Suite 4, Emerson House, 14B Ballynahinch Road, Carryduff, Belfast BT8 8DN	Convention.	50.92	60.00	1F	4	2	3	3	3	3
3	185936687	Suite 5, Emerson House, 14B Ballynahinch Road, Carryduff, Belfast BT8 8DN	Convention.	28.04	60.00	1F	4	2	3	3	3	3
4	185765930	Suite 3, Emerson House, 14B Ballynahinch Road, Carryduff, Belfast BT8 8DN	Convention.	60.39	80.00	1F	4	2	3	3	3	3
5	185067621	Suite 2, Emerson House, 14B Ballynahinch Road, Carryduff, Belfast BT8 8DN	Convention.	198.69	80.00	1F	4	2	3	3	3	3
6	185765983	Unit 24, The Carryduff Centre, Church Road, Carryduff, Belfast BT8 8RB	Convention.	64.20	100.00	GF, inside derelict mall	n/a	n/a	n/a	n/a	n/a	

A1.7.4 Carryduff West

Number of entries: 12 Total area: 1,616.64m2

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
1	187305486	Unit 3, 33 Ballynahinch Road, Lowes Industrial Estate, Carryduff, Belfast BT8 8EH	FD	37.53	80.00	1F	4	3	3	2	3	3
2	185969660	Unit 8, Agar House, 31 Ballynahinch Road, Lowes Industrial Estate, Carryduff, Belfast BT8 8EH	Other	44.40 99.79	80.00 80.00	GF mezzanine GF	4 4	3 3	3 3	2 2	3 3	3 3
3	185955510	Unit 21, Agar House, 31 Ballynahinch Road, Lowes Industrial Estate, Carryduff, Belfast BT8 8EH	Other	115.00 122.97	80.00 80.00	GF 1F	4 4	3 3	3 3	2 2	3 3	3 3
4	185766097	Unit 18B, Agar House, 31 Ballynahinch Road, Lowes Industrial Estate, Carryduff, Belfast BT8 8EH	Not applicable	50.98 48.37	60.00 60.00	USE=SHRM, STO (both GF).	4	3	3	2	3	3
5	185766091	Unit 10, Agar House, 31 Ballynahinch Road, Lowes Industrial Estate, Carryduff, Belfast BT8 8EH	Other	66.90	80.00	GF	4	3	3	2	3	3
6	185067904	Unit 19, Agar House, 31 Ballynahinch Road, Lowes Industrial Estate, Carryduff, Belfast BT8 8EH	Temporary Building	206.89	60.00	GF	4	3	3	3	3	3.2

Carryduff West

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
7	185067900	Unit 18a, Agar House, 31 Ballynahinch Road, Lowes Industrial Estate, Carryduff BT8 8EH	Temporary Building	64.54	80.00	GF	4	3	3	3	3	3.2
8	185067167	Unit 4, Agar House, 31 Ballynahinch Road, Lowes Industrial Estate, Carryduff, BT8 8EH	Convention.	362.50	80.00	1F	4	3	3	3	3	3.2
9	185067895	Unit 1, Agar House, 31 Ballynahinch Road, Lowes Industrial Estate, Carryduff, BT8 8EH	FD	59.00 77.00 36.60	80.00 80.00 80.00	1F GF GF	4 4 4	3 3 3	3 3 3	3 3 3	3 3 3	3.2 3.2 3.2
10	187643233	Unit 7, Agar House, 31 Ballynahinch Road, Lowes Industrial Estate, Carryduff BT8 8EH	Convention.	53.95 117.07	88.00 88.00	GF GF	4 4	3 3	3 3	3 3	3 3	3.2 3.2
11	187643231	Unit 5b, Agar House, 31 Ballynahinch Road, Lowes Industrial Estate, Carryduff BT8 8EH	Convention.	44.10	88.00	GF	4	3	3	3	3	3.2
12	187549722	Unit 11a, Agar House, 31 Ballynahinch Road, Lowes Industrial Estate, Carryduff BT8 8EH	Other	73.55 34.85	80.00 80.00	GF GF	4 3	3 3	3 3	3 3	3 3	3.2 3

A1.7.5 Dundonald

Number of entries: 1   Total area: 11m2

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
1	185155983	736 Upper Newtownards Road, Belfast BT16 1RJ	Convention.	11.00	80.00	1F	4	3	2	1	2	2.4

A1.7.6 Galwally

Number of entries: 2   Total area: 255.44m2

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
1	187586957	UNIT 15, FORESTSIDE SHOPPING CENTRE, Saintfield Road, Belfast BT8 6FX	Convention.	185.44	100.00	1F	5	4	4	3	4	4
2	187672186	BASEMENT CONFERENCE ROOM, FORESTSIDE SHOPPING CENTRE, Saintfield Road, Belfast BT8 6FX	Convention.	70.00	90.00	LG	5	4	4	3	3	4

A1.7.7 Graham's Bridge

Number of entries: 2 Total area: 102.00m^2

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
1	185156002	961 Upper Newtownards Road, Belfast BT16 1RL	FD	13.00 29.00	80.00 80.00	GF 1F	4 4	3 3	3 1	3 2	2 2	3 2.4
2	n/a	983A Upper Newtownards Road, Belfast BT16 1RN	Convention.	30.00	80.00	Likely to be the same approximate size as 983	4	3	1	2	2	2.4
3	187593103	983 Upper Newtownards Road, Belfast BT16 1RN	Convention.	30.00	80.00	1F	4	3	1	2	2	2.4

A1.7.8 Hilden

Number of entries: 105 Total area: 14,040.03m^2

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
1	185265525	72 Chapel Hill, Lisburn BT28 1BW	Convention.	171.20	55.00	1F	4	3	3	2	3	3
2	187575210	Unit 38, Bow Street Mall, Lisburn BT28 1BN	Convention.	149.80	82.50	1F	4	3	3	2	3	3
3	185810786	15A Chapel Hill, Lisburn BT28 1EP	Convention.	34.60	55.00	1F	4	2	2	2	2	2.4
4	185266057	15 Chapel Hill, Lisburn BT28 1EP	Convention.	14.60	55.00	1F	4	2	2	2	2	2.4
5	187531718	12 Bow Lane, Lisburn BT28 1FL	Convention.	7.78 13.19	90.00 90.00	1F 1F	4 4	2 2	3 3	1 1	2 2	2.4 2.4
6	187141422	31 Antrim Street, Lisburn BT28 1AU	Convention.	496.20 471.63	82.50 103.13	1F GF	4 4	3 3	3 3	2 2	2 2	2.8 2.8
7	187594568	6 Bow Lane, Lisburn BT28 1FL	Other	41.80 24.27	90.00 90.00	1F 1F	4 4	2 2	3 3	2 2	2 2	2.6 2.6
8	187141280	Ground Floor Office C, 68 Bow Street, Lisburn BT28 1BN	Convention.	55.41	93.75	GF	4	2	2	3	3	2.8
9	185265335	Offices Car Park, 68 Bow Street, Lisburn BT28 1AL	FD	40.15 82.49 24.30 95.04 15.03	93.75 67.50 93.75 50.63 84.38	GF 1F GF 2F GF	4 4 4 4 4	2 2 2 2 2	2 2 2 2 2	3 3 2 3 2	3 3 3 3 3	2.8 2.8 2.6 2.8 2.6
10	187568972	6C Market Place, Lisburn BT28 1AN	Convention.	137.62	78.65	1F	4	2	2	3	2	2.6

Hilden

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
11	187568969	2nd Floor, 8B Market Place, Lisburn BT28 1AN	Convention.	44.00	78.65	2F	4	2	2	1	2	2.2
12	187568709	2nd Floor, 6A Market Place, Lisburn BT28 1AN	Convention.	117.08	78.65	2F	4	2	2	2	2	2.4
13	187594564	2 Bow Lane, Lisburn BT28 1FL	Convention.	96.24	90.00	1F	4	3	3	2	2	2.8
14	187686941	1st Floor, Wallace Buildings, 5 Market Place, Lisburn BT28 1AN	Convention.	78.40	71.50	1F	4	2	2	1	2	2.2
15	185809546	54-56 Antrim Street, Lisburn BT28 1AU	Convention.	74.27 137.40	75.00 93.75	USE = STO, 1F USE = STO, GF	4 4	3 3	2 2	2 2	2 2	2.6 2.6
16	187141623	30 Hillsborough Road, Lisburn BT28 1AQ	Convention.	94.69 96.40	82.50 103.13	1F GF	3 3	2 2	3 3	2 2	2 2	2.4 2.4
17	185265507	52A Bow Street, Lisburn BT28 1BN	Convention.	50.31	75.00	1F	3	2	2	1	2	2
18	187375553	1st Floor, Wallace Buildings, 23 Market Place, Lisburn BT28 1AN	Convention.	137.25	78.65	1F	4	3	2	2	2	2.6
19	187143110	34 Hillsborough Road, Lisburn BT28 1AQ	FD	25.70 33.24 16.58	93.75 75.00 93.75	GF 1F GF	3 3 3	2 2 2	3 3 3	1 1 1	2 2 2	2.2 2.2 2.2
20	185810795	32 Hillsborough Road, Lisburn BT28 1AQ	FD	32.02 119.98	75.00 93.75	1F GF	3 3	2 2	3 3	1 1	2 2	2.2 2.2

Hilden

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
21	185265448	6 Mckeown Street, Lisburn BT28 1BD	Convention.	66.10	75.00	1F	3	2	3	1	2	2.2
22	185809516	Bow House, 69-71 Bow Street, Lisburn BT28 1BJ	Convention.	125.00	93.75	GF	4	3	3	3	3	3.2
				867.00	82.50	1F	4	3	3	3	3	3.2
				904.00	82.50	2F	4	3	3	3	3	3.2
23	187570601	Suite 2, 10 Haslems Lane, Lisburn BT28 1TW	Convention.	184.92	107.25	1F	4	3	3	3	3	3.2
24	185269707	37A Bachelors Walk, Lisburn BT28 1XN	FD	77.63	75.00	1F	4	2	3	2	2	2.6
25	185269685	33 Bachelors Walk, Lisburn BT28 1XN	FD	29.62	75.00	1F	4	2	3	2	2	2.6
				50.04	93.75	GF	4	2	3	2	2	2.6
				15.39	56.25	2F	4	2	3	2	2	2.6
26	185809511	Offices 1st & 2nd Floor, 39 Bow Street, Lisburn BT28 1BJ	Convention.	111.78	75.00	1F	4	2	3	2	2	2.6
				92.20	56.25	2F	4	2	3	2	2	2.6
27	185269679	19 Bachelors Walk, Lisburn BT28 1XJ	FD	41.98	93.75	GF	4	2	3	2	2	2.6
				46.72	75.00	1F	4	2	3	2	2	2.6
				48.90	56.25	2F	4	2	3	2	2	2.6
28	187132551	17 Bachelors Walk, Lisburn BT28 1XJ	FD	15.77	56.25	2F	4	2	3	2	2	2.6
				26.88	75.00	1F	4	2	3	2	2	2.6
29	187694218	2A Smithfield, Lisburn BT28 1TH	Convention.	75.50	60.00	1F	4	3	3	2	3	3
30	187420796	2A Smithfield, Lisburn BT28 1TH	Convention.	75.40	75.00	GF	4	3	3	2	3	3

Hilden

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
31	187389416	Unit 12, Graham Gardens Shopping Centre, 3 Graham Gardens, Lisburn BT28 1XE	Convention.	60.95	55.00	1F	4	4	2	2	3	3
32	185265301	46A Market Square North, Lisburn BT28 1AG	Convention.	195.32	65.00	1F, USE = ROOM	4	2	2	2	2	2.4
33	185269594	10 Graham Gardens, Lisburn BT28 1XE	Convention.	65.17 215.99	82.50 66.00	GF 1F	4 4	4 4	2 2	3 3	3 3	3.2 3.2
34	187574807	1-3 Bachelors Walk, Lisburn BT28 1XJ	Convention.	85.45 101.47	121.88 97.50	GF 1F	4 4	3 3	3 3	2 2	3 3	3 3
35	187569020	1st Floor, 10 Market Street, Lisburn BT28 1AR	Convention.	39.50	55.00	1F	4	3	2	1	2	2.4
36	185269605	5 Wardsborough Road, Lisburn BT28 1XF	Convention.	94.78	45.00	1F	4	2	3	2	2	2.6
37	185809789	33A Railway Street, Lisburn BT28 1XP	FD	28.36 28.39	75.00 56.25	1F 2F	4 4	2 2	2 2	2 2	2 2	2.4 2.4
38	185809754	8B Market Square North, Lisburn BT28 1AF	Convention.	53.97	55.00	1F	4	2	3	2	2	2.6
39	185809753	8A Market Square North, Lisburn BT28 1AF	Convention.	96.00	55.00	1F	4	2	3	2	2	2.6
40	187568669	Unit 3, 49E Market Square South, Lisburn BT28 1AD	Convention.	10.30	41.25	2F, USE = ROOM	4	2	2	1	1	2

Hilden

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
41	187568667	Unit 2, 49E Market Square South, Lisburn BT28 1AD	Convention.	15.44	41.25	2F, USE = ROOM	4	2	2	1	1	2
42	187568665	Unit 3, 49C Market Square South, Lisburn BT28 1AD	Convention.	15.86	41.25	2F, USE = ROOM	4	2	2	1	1	2
43	187568660	Unit 2, 49C Market Square South, Lisburn BT28 1AD	Convention.	15.53	41.25	2F, USE = ROOM	4	2	2	1	1	2
44	187568658	Unit 2, 49A Market Square South, Lisburn BT28 1AD	Convention.	11.93	55.00	1F, USE = ROOM	4	2	2	1	2	2.2
45	185809745	49E Market Square South, Lisburn BT28 1AD	Conversion	10.26	41.25	2F, USE = ROOM	4	2	2	1	1	2
46	185809743	49B Market Square South, Lisburn BT28 1AD	Convention.	32.60	55.00	1F	4	2	2	1	1	2
47	185265273	49C Market Square South, Lisburn BT28 1AD	Convention.	9.57	41.25	2F, USE = ROOM	4	2	2	1	1	2
48	185269755	29 Railway Street, Lisburn BT28 1XP	Convention.	242.30	93.75	GF	4	2	2	2	2	2.4
				53.70	56.25	2F	4	2	2	2	2	2.4
				73.90	75.00	1F	4	2	2	2	2	2.4
49	185269636	25 Railway Street, Lisburn BT28 1XG	FD	52.70	67.50	1F	4	1	2	1	1	1.8
50	187568832	Office 1st Floor, 39 Market Square South, Lisburn BT28 1AD	Convention.	120.92	55.00	1F	4	2	2	1	1	2

Hilden

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
51	187704423	39A Market Square South, Lisburn BT28 1AD	Convention.	87.44	41.25	2F	4	1	2	1	1	1.8
52	185269619	2A Wallace Avenue, Lisburn BT27 4AA	Convention.	161.58	75.63	GF	4	4	3	3	3	3.4
				103.86	60.50	1F	4	4	3	3	3	3.4
53	185269644	21A Railway Street, Lisburn BT28 1XG	Conversion	6.20	93.75	GF	4	2	2	2	2	2.4
				87.08	75.00	1F	4	2	2	2	2	2.4
54	187205846	23 Linenhall Street, Lisburn BT28 1FJ	Convention.	972.32	78.65	4F	4	5	3	4	4	4
55	186001440	9 Railway Street, Lisburn BT28 1XG	FD	43.92	75.00	1F	4	2	2	1	2	2.2
				9.00	75.00	1F	4	2	2	1	2	2.2
56	187141377	18 Railway Street, Lisburn BT28 1XG	FD	30.50	56.25	2F	4	3	2	2	2	2.6
				43.00	75.00	1F	4	3	2	2	2	2.6
				47.60	93.75	GF	4	3	2	2	2	2.6
57	185269626	5 Railway Street, Lisburn BT28 1XG	FD	27.37	56.25	2F	4	2	2	1	2	2.2
				37.62	75.00	1F	4	2	2	1	2	2.2
				38.99	103.13	GF	4	2	2	1	2	2.2
58	187141364	16B Railway Street, Lisburn BT28 1XG	N/A	38.82	56.25	2F	4	3	2	2	2	2.6
59	185269613	10 Railway Street, Lisburn BT28 1XG	Convention.	51.35	45.56	2F	4	2	2	2	2	2.4
				22.15	140.00	GF	4	2	2	2	2	2.4
				52.73	75.00	1F	4	2	2	2	2	2.4
				8.45	70.00	GF	4	2	2	2	2	2.4
60	?	21 Market Square South, Lisburn BT28 1AD	Convention.	684.00	55.00	Possibly 2F	4	2	2	3	2	2.6

Hilden

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
61	185259105	Castle Chambers, 1 Castle Street, Lisburn BT27 4SR	FD	183.10 100.00	70.00 52.50	1F 2F	4 4	3 3	2 2	3 3	3 3	3 3
62	185269908	7 Market Lane, Lisburn BT28 1YG	Convention.	87.49	60.50	1F	4	2	2	2	2	2.4
63	187417978	9 Market Lane, Lisburn BT28 1YG	FD	31.26	68.06	GF	4	2	2	2	2	2.4
64	185259079	13D Castle Street , Lisburn BT27 4SP	Convention.	33.20	70.00	1F	3	2	3	1	2	2.2
65	185269835	3A Bridge Street, Lisburn BT28 1XZ	FD	49.30 48.40	41.25 55.00	2F 1F	3 3	2 2	3 3	1 1	2 2	2.2 2.2
66	185259072	17A Castle Street, Lisburn BT27 4SP	Convention.	85.17	70.00	1F	3	3	3	2	2	2.6
67	187413891	16C Castle Street, Lisburn BT27 4XD	Convention.	59.40	52.50	2F	3	3	3	2	2	2.6
68	187372920	20B Castle Street, Lisburn BT27 4XD	Conversion	47.25	52.50	2F	3	2	3	1	1	2
69	185259814	20A Castle Street , Lisburn BT27 4XD	Conversion	28.58	70.00	1F	3	2	3	1	1	2
70	187405410	27F Castle Street, Lisburn BT27 4SP	Conversion	31.30	87.50	GF	3	2	3	1	2	2.2

Hilden

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
71	187123167	23 Bridge Street, Lisburn BT28 1XZ	Convention.	81.09 21.12 86.85	87.50 52.50 77.00	GF 2F 1F	4 4 4	3 3 3	2 2 2	3 3 3	3 3 3	3 3 3
72	187359262	Town Hall, 29-31 Castle Street, Lisburn BT27 4DH	Convention.	149.86 86.76	70.00 87.50	1F GF	4 4	3 3	3 3	3 3	4 4	3.4 3.4
73	185259071	33 Castle Street, Lisburn BT27 4SP	N/A	45.33	87.50	GF	4	3	3	2	3	3
74	187205804	27 Linenhall Street, Lisburn BT28 1FJ	Convention.	15.90 14.90	60.50 60.50	1F 1F	3 3	3 3	3 3	1 1	3 3	2.6 2.6
75	185809525	39A Bridge Street , Lisburn BT28 1XY	FD	63.30 32.30	70.00 52.50	1F 2F	3 3	3 3	3 3	2 2	3 3	2.8 2.8
76	185269817	57A Bridge Street , Lisburn BT28 1XZ	FD	32.35 22.05	55.00 41.25	1F 2F	3 3	3 3	3 3	2 2	3 3	2.8 2.8
77	187691245	Unit 1, 4 Seymour Street, Lisburn BT27 4XF	Convention.	33.25	30.00	GF	3	3	3	1	3	2.6
78	187551483	2B Seymour Street, Lisburn BT27 4XF	Temporary Building	26.66	70.00	GF	3	2	2	2	2	2.2
79	187555632	2C Queens Road, Lisburn BT27 4TZ	Convention.	99.34	80.00	GF	3	3	3	3	2	2.8
80	187595558	2nd Floor Offices, Castle Chambers, 1 Castle Street, Lisburn	FD	73.10	52.50	2F	4	3	2	3	3	3

Hilden

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
81	187570603	Office Suite 1, 8 Haslems Lane, Lisburn BT28 1TW	Convention.	182.00	107.25	1F	4	3	1	3	3	2.8
82	187570599	Office Suite 3, 12 Haslems Lane, Lisburn BT28 1TW	Convention.	182.00	107.25	SF	4	3	1	3	3	2.8
83	187570597	Office Suite 4, 14 Haslems Lane, Lisburn BT28 1TW	Convention.	190.30	107.25	2F	4	3	1	3	3	2.8
84	187593903	Office C, 21 Market Square South, Lisburn BT28 1AD	Convention.	684.00	55.00	1F	4	3	2	3	3	3
85	187677798	24 Antrim Street, Lisburn BT28 1AU	Convention.	72.25	93.75	GF	3	3	3	2	3	2.8
86	187594125	32 Market Square North, Lisburn BT28 1AG	Convention.	23.05	55.00	1F	4	2	1	1	2	2
87	187568332	Lisburn Suite, 33 Lisburn Square, Lisburn BT28 1TS	Convention.	293.30	97.50	1F	4	4	3	4	3	3.6
88	187590086	Office B, 68 Bow Street, Lisburn BT28 1BN	N/A	52.05	93.75	GF	3	2	1	2	3	2.2
89	187564881	13C Antrim Street , Lisburn BT28 1AU	Other	10.06	75.00	1F	3	2	1	1	2	1.8
90	187564893	14A Antrim Street , Lisburn BT28 1AU	Convention.	21.42	67.50	USE = SAL, 1F	3	2	1	1	2	1.8

Hilden

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
91	187567400	17A Graham Gardens, Lisburn BT28 1XE	Convention.	62.57	71.50	1F	3	3	2	1	3	2.4
92	187562256	17A Railway Street, Lisburn BT28 1XG	Convention.	15.56	75.00	1F	3	2	2	1	2	2
93	187567560	19A Graham Gardens, Lisburn BT28 1XE	Convention.	62.41	71.50	1F	3	3	2	1	3	2.4
94	187677802	24A Antrim Street , Lisburn BT28 1AU	Convention.	90.00	75.00	1F	3	3	3	2	3	2.8
95	187640771	24A Castle Street, Lisburn BT27 4XD	Convention.	28.80	70.00	1F	3	3	3	1	2	2.4
96	187677800	24B Antrim Street, Lisburn BT28 1AU	Convention.	27.90	56.25	2F	3	3	3	2	3	2.8
97	187565087	2A Chapel Hill Mews, Lisburn BT28 1FH	Convention.	12.74	89.38	GF	3	3	2	1	3	2.4
98	187562086	2D Queens Road, Lisburn BT27 4TZ	N/A	120.20	80.00	1F	3	3	3	2	3	2.8
99	187574894	2E Queens Road, Lisburn BT27 4TZ	Convention.	101.50	80.00	GF	3	3	3	2	3	2.8
				114.50	80.00	1F	3	3	3	2	3	2.8
c0	187603011	35A Railway Street, Lisburn BT28 1XP	FD	60.62	75.00	1F	3	3	3	2	3	2.8
				43.67	56.25	2F	3	3	3	2	3	2.8

Hilden

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
c1	187696185	Unit 3, 49A Market Square South, Lisburn BT28 1AD	FD	23.02	55.00	1F	4	2	2	1	3	2.4
c2	187564769	67A Bachelors Walk, Lisburn BT28 1XN	Conversion	50.00		1F	4	3	3	1	2	2.6
				50.00		2F	4	3	3	1	2	2.6
c3	187677973	6B Queens Road, Lisburn BT27 4TZ	Convention.	34.26	80.00	GF	3	1	2	1	2	1.8
c4	187594093	6C Market Square North, Lisburn BT28 1AF	Convention.	23.10	41.25	2F	3	2	2	1	2	2
c5	187392461	Store, N 1 C, Lisburn Square, Lisburn	Convention.	89.60	33.00	BASE	4	3	3	2	3	3

A1.7.9 Hillhall

Number of entries: 1 Total area: 8,452m^2

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
1	185258762	Lagan Valley Island, 1 The Island, Lisburn BT27 4RL	Civic Centre	689.00	all 80.00	GF	5	5	4	3	5	4.4
				2,323.85		GF	5	5	4	3	5	4.4
				2,460.36		1F	5	5	4	3	5	4.4
				1,840.00		2F	5	5	4	3	5	4.4
				1,140.00		3F	5	5	4	3	5	4.4

A1.7.10 Hillsborough

Number of entries: 25 Total area: 1,598.70m^2

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
1	185254002	1 Dromore Road, Hillsborough BT26 6HS	Convention.	57.72	40.00	GF – location?	2	2	4	3	2	2.6
2	185810202	1-2 Barrack Court, Off Inns Lane, Hillsborough BT26 6AQ	FD	43.40	76.50	GF	3	2	3	2	3	2.6
3	185252702	9 The Square, Hillsborough BT26 6AG	FD	35.90	85.00	1F	4	3	2	2	3	2.8
				38.70	106.25	GF	4	3	2	1	3	2.6
				21.80	63.75	2F (USE = STOR)	4	2	2	1	2	2.2
4	185893663	7C The Square, Hillsborough BT26 6AG	Convention.			No data –						
5	187415025	5E The Square, Hillsborough BT26 6AG	Convention.	44.90	102.00	1F	4	3	3	1	3	2.8
6	187161741	5D The Square, HillsboroughBT26 6AG	Convention.	41.80	127.50	GF	4	3	3	2	3	3
7	185252708	5C The Square, Hillsborough BT26 6AG	FD	5.55	85.00	1F (USE = STOR)	4	2	3	1	2	2.4
				75.87	85.00	1F	4	3	3	2	3	3
				7.68	76.50	1F (USE = KITCN)	4	2	3	1	2	2.4
8	185252617	13 Main Street, Hillsborough BT26 6AE	FD	63.35	85.00	1F	4	3	3	2	3	3
				43.13	106.25	GF	4	3	3	2	3	3
				5.52	106.25	GF (USE = KITCN)	4	2	3	1	2	2.4
9	185252591	62 Lisburn Street, Hillsborough BT26 6AB	Other	20.40	93.50	1F	4	3	3	1	2	2.6
				3.96	93.50	1F (USE = KITCN)	4	2	3	1	2	2.4

Hillsborough

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
10	187393619	12A Main Street, Hillsborough BT26 6AE	FD	23.80	106.25	GF	4	3	2	2	2	2.6
11	187123576	12 Main Street, Hillsborough BT26 6AE	FD	61.60	85.00	1F	4	3	2	2	2	2.6
				20.70	106.25	GF (USE = KITCN)	4	3	2	1	2	2.4
				46.00	63.75	2F	4	2	2	2	1	2.2
12	187596663	10 Main Street, Hillsborough BT26 6AE	FD	92.85	63.75	2F	4	3	3	2	1	2.6
13	187596662	10 Main Street Hillsborough BT26 6AE	FD	90.79	85.00	1F	4	3	3	2	2	2.8
14	185810300	22A Lisburn Street, Hillsborough BT26 6AB	Other	13.40	85.00	1F	4	3	3	1	2	2.6
15	185810296	6 Lisburn Street, Hillsborough BT26 6AB	FD	34.80	63.75	2F	4	2	2	1	1	2
16		6D Lisburn Street, Hillsborough BT26 6AB	Other			No information – double entry?						
17	185252600	11 Lisburn Street. Hillsborough BT26 6AB	FD	28.55	106.25	GF	4	3	3	1	2	2.6
				21.00	85.00	1F	4	3	3	1	2	2.6

Hillsborough

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
18	187401677	3A Ballynahinch Street, Hillsborough BT26 6AW	Conversion	97.50	85.00	1F	4	2	2	2	2	2.4
				151.26	106.25	GF	4	2	2	2	2	2.4
19	187363110	8A Ballynahinch Street, Hillsborough	FD	63.50	85.00	1F	4	2	2	2	2	2.4
20	187360368	10A Ballynahinch Street, Hillsborough BT26 6AW	FD	48.49	85.00	1F	4	2	2	1	2	2.2
				75.87	106.25	GF (plus STO)	4	2	2	2	2	2.4
21	185252879	10 Ballynahinch Street, Hillsborough BT26 6AW	Convention.	66.60	106.25	GF (plus STO)	4	2	2	2	2	2.4
22	187255498	6 The Chimes, Hillsborough BT26 6AJ	Convention.	30.90	138.13	GF	4	3	3	1	3	2.8
23	187255506	10 The Chimes, Hillsborough BT26 6AJ	Convention.	38.34	110.50	1F	4	3	3	1	3	2.8
				22.96	82.88	2F	4	3	3	1	2	2.6
24	187363119	14A Ballynahinch Street, Hillsborough BT26 6AW	Other	16.24	106.25	GF	4	2	3	1	1	2.2
				16.97	85.00	1F	4	2	3	1	1	2.2
25	185252892	24 Ballynahinch Street, Hillsborough BT26 6AW	FD	50.76	127.50	GF	4	3	3	1	2	2.6
				41.35	102.00	1F	4	3	3	1	2	2.6

A1.7.11 Lagan

Number of entries: 17 Total area: 615.80m^2

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
1	185631381	39 Main Street, Moira BT67 0LQ	FD	14.60 32.30	68.75 55.00	GF 1F	3 3	2 2	3 3	1 2	3 3	2.4 2.6
2	185631383	43 Main Street, Moira BT67 0LQ	FD	28.20	61.88	GF	3	2	3	2	3	2.6
3	185811337	55B Main Street, Moira BT67 0LQ	Conversion	8.11 2.84 3.76 7.25 6.74	All 55.00	1F	3 3 3 3 3	2 2 2 2 2	2 2 2 2 2	1 1 1 1 1	2 2 2 2 2	2 2 2 2 2
4		1A Rawdon Ct, Main St, Moira, BT67 0NX	Convention.	30		Rawdon Ct = 76 Main St, Moira	3	3	2	1	3	2.4
5	185811405	4A Rawdon Ct, Main St, Moira BT67 0LQ	Other	97.92	60.50	1F, as 76 Main St, Moira?	3	3	2	1	3	2.4
6	185811344	67A Main Street, Moira BT67 0LQ	FD	44.56	55.00	1F	3	3	2	1	2	2.2
7	185631237	79 Main Street, Moira BT67 0LH	FD	30	55.00	USE (NOT) = OFFICE, 1F?	3	3	2	1	3	2.4
8	185631258	85B Main Street, Moira BT67 0LH	Convention.	33.50	66.00	1F	3	3	2	1	3	2.4
9	185631256	87 Main Street, Moira BT67 0LH	FD	101.40 35.60	55.00 55.00	1F 2F	3 3	3 3	2 2	1 1	2 2	2.2 2.2

Lagan

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
10	187593676	89 Main St, Moira BT67 0LH	FD	22.20 41.30 3.20	41.25 55.00	2F (ROOM) 1F (ROOM) 2F (STORE)	3 3 3	2 2 2	3 3 3	1 1 1	2 2 2	2.2 2.2 2.2
11	185811366	89 Main St, Moira BT67 0LH	FD	58.20	68.75	GF (SHOP)	3	3	3	1	2	2.4
12	186016985	99 Main St, Moira BT67 0LH	Other	49.20 30.40	55.00 68.75	1F (ROOM) GF (ROOM)	3 3	2 2	3 3	1 1	2 2	2.2 2.2
13	187597258	101D Main St, Moira BT67 0LH	FD	25.70	55.00	1F (SHOP)	3	3	3	1	2	2.4
14	187597262	101F Main St, Moira BT67 0LH	FD	21.42	55.00	1F	3	3	3	1	2	2.4
15	187597264	101G Main St, Moira BT67 0L	FD	39.60 15.20	41.25 41.25	2F 2F (ROOM)	3 3	2 2	3 3	1 1	2 2	2.2 2.2
16	187675783	4B Meeting St, Moira BT67 0NR	FD	38.64 84.20	40.00 50.00	1F (STORE) 1F	3 2	2 1	3 3	1 1	1 1	2 1.6
17	187575194	85C Main St, Moira BT67 0LH	FD	23.80	55.00	1F	3	4	3	1	3	2.8

A1.7.12 Moira

Number of entries: 17 Total area: 752.57m^2

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
1	185631618	32A Old Kilmore Road, Moira BT67 0LZ	Convention.	83.50	40.00	GF – location not clear?	2	3	3	2	2	2.4
2	187575159	34A Main Street, Moira BT67 0LE	Convention.	103.71	71.50	1F	3	3	2	2	3	2.6
3	185631382	40 Main Street, Moira BT67 0LQ	Former Dwelling	18.10 52.42	68.75 55.00	GF 1F	3 3	2 2	3 3	2 2	3 3	2.6 2.6
4	187378726	66E Main Street, Moira BT67 0LQ	Other	18.69	61.88	USE = SHOP	3	3	3	2	3	2.8
5	187378724	66D Main Street, Moira BT67 0LQ	FD	63.57	55.00	1F	3	3	3	1	3	2.6
6	187145524	76 Main Street, Moira BT67 0LQ	FD	24.80	55.00	1F	3	3	2	1	3	2.4
7	185811352	76 Main Street, Moira BT67 0LQ	FD	23.37	55.00	1F	3	3	2	1	3	2.4
8	185811351	76 Main Street, Moira BT67 0LQ	FD	12.20 10.20	55.00 55.00	1F 1F	3 3	3 3	2 2	1 1	3 3	2.4 2.4
9	185631414	76 Main Street, Moira BT67 0LQ	FD	28.00 16.61	55.00 41.25	1F 2F	3 3	3 3	2 2	1 1	3 3	2.4 2.4

Moira

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
10	185979215	88C Main Street, Moira BT67 0LH	FD	9.78	55.00	1F	3	2	2	1	3	2.2
11	185811370	92B Main Street , Moira BT67 0LH	Convention.	14.90	55.00	1F	3	1	2	1	2	1.8
12	187575192	76 Main Street, Moira BT67 0LQ	Convention.	23.32	55.00	1F	3	3	2	1	3	2.4
13	187408439	32D Old Kilmore Road, Moira BT67 0LZ	Convention.	58.77	40.00	GF – within industrial unit	3	2	3	3	2	2.6
14	187408451	34A Old Kilmore Road, Moira BT67 0LZ	Other	85.30	40.00	GF – within industrial unit	3	2	3	3	2	2.6
				38.50	40.00	GF – within industrial unit	3	2	3	3	2	2.6
15	187408435	34F Old Kilmore Road, Moira BT67 0LZ	Other	85.70	40.00	USE = SHOP – within industrial unit	3	2	3	3	2	2.6
16	187627190	88B Main Street , Moira BT67 0LH	FD	54.10	55.00	1F	3	2	2	2	3	2.4
17	187636827	88D Main Street, Moira BT67 0LH	FD	30.82	55.00	1F	3	2	2	2	3	2.4

13-15 – within an industrial unit and tied to a distribution centre.

A1.7.13 Newtownbreda

Number of entries: 1 Total area: 78.5m^2

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
1	187595361	71A Saintfield Road, Belfast BT8 7HN	Convention.	78.50	80.00	1F	4	4	4	3	3	3.6

A1.7.14 Wallace Park

Number of entries: 40 Total area: 3,698.88m²

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
1	185265362	64 Antrim Street, Lisburn BT28 1AU	Convention.	52.60	82.50	1F	4	3	3	3	3	3.2
2	185269698	74 Bachelors Walk, Lisburn BT28 1XN	FD	44.70	93.75	GF	4	3	3	3	3	3.2
				23.30	75.00	1F	4	2	3	3	3	3
3	185269715	54 Bachelors Walk, Lisburn BT28 1XN	Convention.	115.18	90.75	2F	4	3	3	3	2	3
4	185269711	44 Bachelors Walk, Lisburn BT28 1XN	FD	11.30	93.75	GF	4	2	3	3	3	3
				41.12	75.00	1F	4	2	3	2	3	2.8
				11.36	56.25	2F	4	2	3	2	3	2.8
				21.75	93.75	GF	4	2	3	3	3	3
5	185269710	42 Bachelors Walk, LisburnBT28 1XN	Conversion	20.10	75.00	1F	4	2	3	2	3	2.8
				33.70	75.00	1F	4	2	3	2	3	2.8
				36.50	93.75	GF	4	2	3	3	3	3
6	185269688	40 Bachelors Walk, Lisburn BT28 1XN	FD	42.86	93.75	GF	4	2	3	2	3	2.8
7	185269704	30 Bachelors Walk, Lisburn BT28 1XN	FD	14.53	93.75	GF	4	2	3	2	3	2.8
				9.80	93.75	GF	4	2	3	2	3	2.8
				11.27	93.75	GF	4	2	3	1	3	2.6
				25.52	75.00	1F	4	2	3	2	3	2.8
8	185269703	28 Bachelors Walk, Lisburn BT28 1XN	FD	34.44	93.75	GF	4	2	3	2	3	2.8
				17.07	93.75	GF	4	2	3	2	3	2.8
9	185809567	22-24 Bachelors Walk, Lisburn BT28 1XJ	FD	69.20	93.75	GF	4	2	3	2	3	2.8
				85.40	75.00	1F	4	2	3	1	3	2.6
10	185269658	20 Bachelors Walk, Lisburn BT28 1XJ	Convention.	40.57	93.75	GF	4	2	3	1	3	2.6
				20.00	56.25	2F	4	2	3	1	3	2.6
				31.50	75.00	1F	4	2	3	1	3	2.6

Wallace Park

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
11	185269673	18 Bachelors Walk, Lisburn BT28 1XJ	FD	45.20	56.25	2F	4	2	2	2	3	2.6
				29.00	93.75	GF	4	2	2	2	3	2.6
				48.10	75.00	1F	4	2	2	2	3	2.6
12	185809564	16A Bachelors Walk, Lisburn BT28 1XJ	FD	26.14	56.25	2F	4	2	2	2	3	2.6
				29.32	75.00	1F	4	2	2	2	3	2.6
13	185269753	50 Railway Street , Lisburn BT28 1XP	Convention.	37.41	93.75	GF	4	2	2	2	3	2.6
				21.21	93.75	GF	4	2	2	2	3	2.6
14	185269742	44 Railway Street Lisburn BT28 1XP	FD	75.97	93.75	GF	4	2	2	2	3	2.6
				94.89	75.00	1F	4	2	2	2	3	2.6
15	185269741	40 Railway Street, Lisburn BT28 1XP	FD	97.14	93.75	GF	4	2	2	2	3	2.6
				76.26	75.00	1F	4	2	2	2	3	2.6
16	187177099	Unit 1, 1 Sackville Street, Lisburn BT27 4AB	Convention.	98.75	93.75	GF	4	3	3	2	3	3
				19.96	93.75	GF	4	3	3	2	3	3
17	187678433	3A Wallace Studios, Lisburn BT27 4AE	Convention.	86.80	80.00	1F	4	4	3	2	3	3.2
18	187352974	3 Wallace Studios, Lisburn BT27 4AE	Convention.	86.00	80.00	GF	4	4	3	2	3	3.2
19	187352976	4 Wallace Studios, Lisburn BT27 4AE	Convention.	86.00	80.00	GF	4	4	3	2	3	3.2
				86.80	80.00	1F	4	4	3	2	3	3.2
20	187678431	5A Wallace Studios, Lisburn BT27 4AE	Convention.	86.80	80.00	1F	4	4	3	2	3	3.2

Wallace Park

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
21	187352978	5 Wallace Studios, Lisburn BT27 4AE	Convention.	86.00	80.00	GF	4	4	3	2	3	3.2
22	187352972	2 Wallace Studios, Lisburn BT27 4AE	Convention.	86.80	80.00	1F	4	4	3	2	3	3.2
				86.00	80.00	GF	4	4	3	2	3	3.2
23	187352970	1 Wallace Studios, Lisburn BT27 4AE	Convention.	86.80	80.00	1F	4	4	3	2	3	3.2
				86.00	80.00	GF	4	4	3	2	3	3.2
24	185259122	41 Seymour Street, Lisburn BT27 4SY	FD	24.38	52.50	2F	4	2	2	1	3	2.4
25	187570196	Unit 6, 1 Sackville Street, Lisburn BT27 4AB	Convention.	27.37	80.00	GF	4	3	3	2	3	3
				45.64	80.00	1F	4	3	3	2	3	3
26	187570195	Unit 5, 1 Sackville Street, Lisburn BT27 4AB	Convention.	162.20	80.00	2F	4	3	3	2	3	3
27	187570193	Unit 3 & 4, 1 Sackville Street, Lisburn BT27 4AB	Convention.	313.20	80.00	USE = ROOM	4	3	3	2	3	3
28	187570192	Unit 2, 1 Sackville Street, Lisburn BT27 4AB	Convention.	159.32	80.00	GF	4	3	3	2	3	3
29	187696119	Office B, 3 Wallace Avenue, Lisburn BT27 4AA	FD	11.41	55.00	1F	4	4	3	2	3	3.2
30	187696118	Office A, 3 Wallace Avenue, Lisburn BT27 4AA	FD	30.40	55.00	1F	4	4	3	2	3	3.2

Wallace Park

	UPRN	ADDRESS	TYPE	AREA	RATE		L	Q	P	F	WE	S
31	187585959	Unit 9, 38 Bachelors Walk, Lisburn BT28 1XN (TSL House)	Convention.	97.53	107.25	2F	4	3	3	2	3	3
32	187585958	Unit 8, 38 Bachelors Walk, Lisburn BT28 1XN (TSL House)	Convention.	97.20	107.25	2F	4	3	3	2	3	3
33	187585957	Unit 7, 38 Bachelors Walk, Lisburn BT28 1XN (TSL House)	Convention.	93.20	73.13	2F	4	3	3	2	3	3
34	187585956	Unit 6, 38 Bachelors Walk, Lisburn BT28 1XN (TSL House)	Convention.	97.01	107.25	1F	4	3	3	2	3	3
35	187585955	Unit 5, 38 Bachelors Walk, Lisburn BT28 1XN (TSL House)	Convention.	98.00	107.25	1F	4	3	3	2	3	3
36	187585954	Unit 4, 38 Bachelors Walk, Lisburn BT28 1XN (TSL House)	Convention.	91.90	97.50	1F	4	3	3	2	3	3
37	187585953	Unit 3, 38 Bachelors Walk, Lisburn BT28 1XN (TSL House)	Convention.	95.30	121.88	GF	4	3	3	2	3	3
38	187585952	Unit 2, 38 Bachelors Walk, Lisburn BT28 1XN (TSL House)	Convention.	97.30	121.88	GF	4	3	3	2	3	3
39	187585951	Unit 1, 38 Bachelors Walk, Lisburn BT28 1XN (TSL House)	Convention.	93.60	121.88	GF	4	3	3	2	3	3
40	187573385	68A Antrim Street, Lisburn BT28 1AU	Convention.	51.30	90.00	USE = STO, 1F	4	2	2	1	3	2.4

A1.8 Summary

Extracting the different office areas from the database provided by LCCC and totalling the areas of the spaces with USE = OFFICE gives the following ward-by-ward total:

Ward	entries	area (m^2)
Beechill	34	5,080.31
Blaris	4	151.25
Carryduff East	6	506.95
Carryduff West	12	1,616.64
Dundonald	1	11.00
Galwally	2	255.44
Graham's Bridge	3	102.00
Hilden	105	14,040.03
Hillhall	1	8452
Hillsborough	25	1,598.70
Lagan	17	615.80
Moira	17	752.57
Newtownbreda	1	78.50
Wallace Park	40	3,698.88
TOTAL	**268**	**36,960.07**

- figures in orange include an area estimate where a gap in the LPS data exists.
- 352 individual spaces from 268 entries

For comparison (on p.34), the figure provided by the Department for Communities (for Lisburn only) is 47,401m^2 from 183 entries. Without access to the data set used to generate the total, it is impossible to comment on the discrepancy.

A1.9 Analysis of buildings / locations not in LCCC database

The accommodation listed in the previous section omits several significant locations highlighted by GVA NI that lie outside the boundary of the draft BMAP 2015. The table (below) is not intended to be an exhaustive list of excluded office spaces, but does identify a large pool of office accommodation, some of which is 'modern' and of a high quality that is not included in the previous total of 36,960.07m^2.

	Name	Address
1	Forest Grove Business Park	Newtownbreda Road, Belfast BT8 6AW
2	Lisnagarvagh House	Lissue Walk, BT28 2LU
3	The Sidings	Lisnagarvey, BT28 3AJ
4	Knockmore Business Centre	Moira Road, BT28 1JA
5	Moira House	Hillsborough Road, BT28 1GZ
6	Balinderry Road	Lisburn BT28 2BP
7	Crescent Business Park*	Enterprise Crescent, Lisburn BT28 SGN
8	Beechill Business Park	Beechill Road, Belfast, BT8 7QN

*units listed as "workshop (non-industrial)" though many have integrated office space; as before, only the USE = OFFICE areas are totalled.

A1.9.1 Forest Grove Business Park

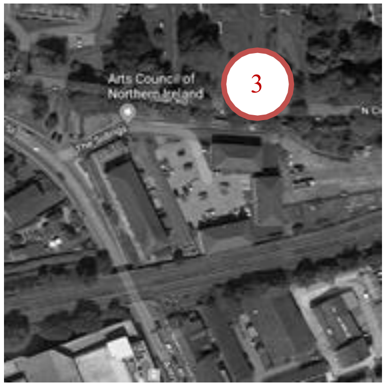
	UPRN	ADDRESS	TYPE	AREA	RATE	
1	187168148	Unit 1, Block 1, Forest Grove Business Park, Belfast BT8 6AW	Convention.	199.80	100.00	1F
2	187168153	Unit 2, Block 1, Forest Grove Business Park, Belfast BT8 6AW	Convention.	199.40	100.00	2F
3	187168154	Unit 3, Block 1, Forest Grove Business Park, Belfast BT8 6AW	Convention.	99.70 193.80	100.00 100.00	3F 3F
4	187168150	Unit 4, Block 2, Forest Grove Business Park, Belfast BT8 6AW	Convention.	199.00	100.00	LG
5	187168151	Unit 5, Block 2, Forest Grove Business Park, Belfast BT8 6AW	Convention.	199.00	100.00	GF
6	187168152	Unit 6, Block 2, Forest Grove Business Park, Belfast BT8 6AW	Convention.	193.80 99.70	100.00 100.00	1F 1F
7	185061542	176 Newtownbreda Road, Belfast BT8 6QS	Convention.	285.90 405.80	100.00 100.00	GF 1F
			total area	**2,075.90**		

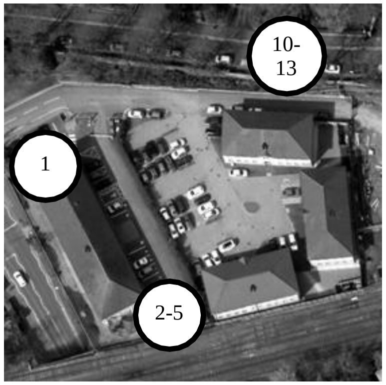
A1.9.2 Lisnagarvagh House

	UPRN	ADDRESS	TYPE	AREA	RATE	
1	187662003	1A Lissue Walk, Lissue Industrial Estate East, Lisburn BT28 2LU	Convention.	175.80 172.00	100.00 100.00	GF 1F
			total area	**347.80**		

A1.9.3 The Sidings

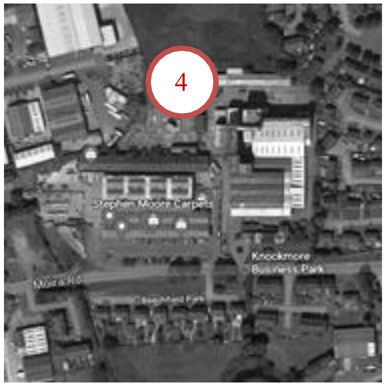
	UPRN	ADDRESS	TYPE	AREA	RATE	
1	185275603	Unit 1, The Sidings, Lisburn BT28 3AJ	Convention.	282.06 400.60	80.00 80.00	GF 1F
2	185927531	Unit A, 2 The Sidings, Lisburn BT28 3AJ	Convention.	86.50	80.00	GF
3	185275606	Unit B, 2 The Sidings, Lisburn BT28 3AJ	Convention.	89.50	80.00	GF
4	185927533	Unit C, 2 The Sidings, Lisburn BT28 3AJ	Convention.	89.70	80.00	1F
5	187571063	Unit D, 2 The Sidings, Lisburn BT28 3AJ	Convention.	89.70	80.00	1F
6	187571062	Unit A, 3 The Sidings, Lisburn BT28 3AJ	Convention.	89.80	80.00	GF
7	185275604	Unit B, 3 The Sidings, Lisburn BT28 3AJ	Convention.	89.80	80.00	GF
8	187627472	Unit C, 3 The Sidings, Lisburn BT28 3AJ	Convention.	89.80	80.00	1F
9	187627473	Unit D, 3 The Sidings, Lisburn BT28 3AJ	Convention.	89.80	80.00	1F
10	187239606	Unit A, 4 The Sidings, Lisburn BT28 3AJ	Convention.	89.80	80.00	GF
11	187574884	Unit B, 4 The Sidings, Lisburn BT28 3AJ	Convention.	89.80	80.00	GF
12	187418101	Unit C, 4 The Sidings, Lisburn BT28 3AJ	Convention.	89.80	80.00	1F
13	187418100	Unit D, 4 The Sidings, Lisburn BT28 3AJ	Convention.	89.80	80.00	1F
			total area	**1,756.46**		





A1.9.4 Knockmore Business Centre

	UPRN	ADDRESS	TYPE	AREA	RATE	
1	187395479	Unit A12B, Knockmore Business Centre, 160-162, Moira Road, Lisburn BT28 1JA	Convention.	57.69	60.00	1F
2	187596832	Unit A10, Knockmore Business Centre, 160-162, Moira Road, Lisburn BT28 1JA	Convention.	75.40	75.00	GF
3	187568957	Unit A12A, Knockmore Business Centre, 160-162, Moira Road, Lisburn BT28 1JA	Convention.	77.25	60.00	1F
4	187568954	Unit A12C, Knockmore Business Centre, 160-162, Moira Road, Lisburn BT28 1JA	Convention.	81.64	60.00	1F
			total area	**291.98**		



A1.9.5 Moira House

	UPRN	ADDRESS	TYPE	AREA	RATE	
1	187144929	Moira House, 121 Hillsborough Road, Lisburn BT28 1GZ	Convention.	497.00 497.00	75.00 75.00	1F GF
2	187567341	Moira House, 121A Hillsborough Road, Lisburn BT28 1GZ	Convention.	751.73 732.55	63.75 67.50	1F GF
			total area	**2,478.28**		

A1.9.6 Balinderry Road

	UPRN	ADDRESS	TYPE	AREA	RATE	
1	187544932	Unit 3, 7-15 Enterprise Crescent, Lisburn BT28 2BP	Convention.	265.00	63.00	GF
2	187555663	Office Suite 104, LEC, 6, Enterprise Crescent, Lisburn BT28 2BP	Convention.	23.20	70.00	1F
3	187555662	Office Suite 103, LEC, 6, Enterprise Crescent, Lisburn BT28 2BP	Convention.	46.10	70.00	1F
4	187555660	Office Suite 105, LEC, 6, Enterprise Crescent, Lisburn BT28 2BP	Convention.	27.50	70.00	1F
5	187555657	Office Suite 106, LEC, 6, Enterprise Crescent, Lisburn BT28 2BP	Convention.	18.25	70.00	1F
6	187555628	Office Suite 107, LEC, 6, Enterprise Crescent, Lisburn BT28 2BP	Convention.	23.20	70.00	1F
7	185886647	LEC, 6, Enterprise Crescent, Lisburn BT28 2BP	Convention.	466.10	77.00	GF
8	187555627	Office Suite 101, LEC, 6, Enterprise Crescent, Lisburn BT28 2BP	Convention.	23.20	70.00	1F
9	187555629	Office Suite 102, LEC, 6, Enterprise Crescent, Lisburn BT28 2BP	Convention.	22.62	70.00	1F
10	187555661	Office Suite 111, LEC, 6, Enterprise Crescent, Lisburn BT28 2BP	Convention.	27.50	70.00	1F
11	187555630	Office Suite 108, LEC, 6, Enterprise Crescent, Lisburn BT28 2BP	Convention.	23.20	70.00	1F
12	187555666	Office Suite 109, LEC, 6, Enterprise Crescent, Lisburn BT28 2BP	Convention.	23.20	70.00	1F
13	187381197	10C, Enterprise Crescent, Lisburn BT28 2BP	Convention.	47.84	96.25	GF
14	187555626	Office Suite 110, LEC, 6, Enterprise Crescent, Lisburn BT28 2BP	Convention.	18.48	70.00	1F
			total area	**1,055.39**		

A1.9.7 Crescent Business Park

	UPRN	ADDRESS	TYPE	AREA	RATE	
1	187205868	11, Crescent Business Park, Lisburn BT28 2GN		87.73	35.00	1F
2	187565811	12A, Crescent Business Park, Lisburn BT28 2GN		88.94	70.00	USE = WSHOP
3	187227166	13, Crescent Business Park, Lisburn BT28 2GN		123.29	70.00	USE = WRHSE
4	187205878	14, Crescent Business Park, Lisburn BT28 2GN		119.73	70.00	USE = WSHOP
5	187227168	15, Crescent Business Park, Lisburn BT28 2GN		122.30	17.50	GM
6	187227170	16, Crescent Business Park, Lisburn BT28 2GN		108.22 107.70	35.00 70.00	1F GF
7	187227180	17, Crescent Business Park, Lisburn BT28 2GN		73.07 28.68	35.00 35.00	1F 1F
8	187227178	18, Crescent Business Park, Lisburn BT28 2GN		9.30	70.00	GF
9	187227176	19, Crescent Business Park, Lisburn BT28 2GN		123.29	70.00	GF
10	187227174	20, Crescent Business Park, Lisburn BT28 2GN		123.29	70.00	USE = WRHSE
11	187227172	21, Crescent Business Park, Lisburn BT28 2GN		126.40 120.96	70.00 35.00	GF 1F
12	187227190	22, Crescent Business Park, Lisburn BT28 2GN		115.08 110.23	70.00 35.00	GF 1F
13	187227188	23, Crescent Business Park, Lisburn BT28 2GN		34.97 86.07 88.90 23.25 126.88	35.00 35.00 35.00 70.00 35.00	1F 1F 1F GF 1F
14	187227182	26, Crescent Business Park, Lisburn BT28 2GN		68.80	35.00	1F
15	187227164	12, Crescent Business Park, Lisburn BT28 2GN		117.60	35.00	1F
16	187693035	1-2 Crescent Business Park, Lisburn BT28 2GN		105.20 41.98 59.99	70.00 70.00 70.00	GF GF GF
17	187227134	5 Crescent Business Park, Lisburn BT28 2GN				USE = WRHSE
18	187227136	3 Crescent Business Park, Lisburn BT28 2GN		98.83 97.62	35.00 70.00	1F GF
19	187205854	4 Crescent Business Park, Lisburn BT28 2GN		95.66 113.62	70.00 35.00	GF 1F
20	187205862	9 Crescent Business Park, Lisburn BT28 2GN		35.70	70.00	GF
21	187227142	10 Crescent Business Park, Lisburn BT28 2GN		114.80	35.00	1F

	UPRN	ADDRESS	TYPE	AREA	RATE	
22	187227148	6 Crescent Business Park, Lisburn BT28 2GN		40.04	70.00	GF
23	187227144	8 Crescent Business Park, Lisburn BT28 2GN				USE = WRHSE
24	187227146	7 Crescent Business Park, Lisburn BT28 2GN		123.93	35.00	1F
25	187210888	31 Crescent Business Park, Lisburn BT28 2GN		24.43	70.00	GF
26	187344009	37 Crescent Business Park, Lisburn BT28 2GN		83.95	70.00	GF
27	187344007	36 Crescent Business Park, Lisburn BT28 2GN		117.00 97.80	70.00 35.00	GF 1F
28	187344004	35 Crescent Business Park, Lisburn BT28 2GN				USE = WRHSE, STO
29	187227150	34 Crescent Business Park, Lisburn BT28 2GN				USE = WRHSE
30	187227152	33 Crescent Business Park, Lisburn BT28 2GN				USE = WRHSE
31	187227154	32 Crescent Business Park, Lisburn BT28 2GN				USE = WRHSE
32	187227160	28 Crescent Business Park, Lisburn BT28 2GN				USE = WRHSE
33	187227162	27 Crescent Business Park, Lisburn BT28 2GN		88.31 100.55 24.57	17.50 35.00 70.00	2F 1F GF
34	187227158	29 Crescent Business Park, Lisburn BT28 2GN				USE = WSHOP….
35	187227156	30 Crescent Business Park, Lisburn BT28 2GN		116.97 103.68	70.00 35.00	GF 1F
			total area	**3,364.06**		

A1.9.8 Beechill Business Park

	UPRN	ADDRESS	TYPE	AREA	RATE	
1	187340713	Unit 1, Rowan House, Beechill Industrial Park, Belfast BT8 7QN	Convention.	75.20 71.70	100.00 100.00	1F GF
2	187340714	Unit 2, Rowan House, Beechill Industrial Park, Belfast BT8 7QN	Convention.	75.20 71.70	100.00 100.00	1F GF
3	187374182	Unit 3, Rowan House, Beechill Industrial Park, Belfast BT8 7QN	Convention.	71.00 71.00	100.00 100.00	1F GF
4	187374172	Unit 8, Linden House, Beechill Industrial Park, Belfast BT8 7QN	Convention.	165.20	100.00	1F
5	187374169	Unit 7, Linden House, Beechill Industrial Park, Belfast BT8 7QN	Convention.	66.80	100.00	1F
6	187340710	Unit 6, Linden House, Beechill Industrial Park, Belfast BT8 7QN	Convention.	170.90	100.00	1F
7	185065737	Units 1-3, Linden House, Beechill Industrial Park, Belfast BT8 7QN	Convention.	362.70	100.00	GF
8	187374168	Unit 16, Linden House, Beechill Industrial Park, Belfast BT8 7QN	Convention.	205.00	100.00	LG (USE = DNURS)
9	187340704	Unit 15, Linden House, Beechill Industrial Park, Belfast BT8 7QN	Convention.	205.00	100.00	LG
10	187340708	Unit 4, Linden House, Beechill Industrial Park, Belfast BT8 7QN	Convention.	185.40	100.00	GF
11	187340709	Unit 5, Linden House, Beechill Industrial Park, Belfast BT8 7QN	Convention.	81.24	100.00	1F
12	187340717	Maple House, Beechill Industrial Park, Belfast BT8 7QN	Convention.	393.60 316.50 108.20	100.00 100.00 100.00	1F GF 1M
			total area	2,491.34		

A1.9.9 Summary of ‘excluded locations’

As with the study of offices within the database, the total below only includes those spaces where the USE = OFFICE in the LPS database.

Across the entire LCCC area, the total office capacity **excluded** from the database is potentially significantly higher than the figure below. In the analysis presented in the main report, the assumption is that 50% more space than the figure quoted below exists.

	Name	Address	Area (m^2)
1	Forest Grove Business Park	Newtownbreda Road, Belfast BT8 6AW	2,075.90
2	Lisnagarvagh House	Lissue Walk, BT28 2LU	347.80
3	The Sidings	Lisnagarvey, BT28 3AJ	1,756.46
4	Knockmore Business Centre	Moira Road, BT28 1JA	291.98
5	Moira House	Hillsborough Road, BT28 1GZ	2,478.28
6	Balinderry Road	Lisburn BT28 2BP	1,055.39
7	Crescent Business Park	Enterprise Crescent, Lisburn BT28 SGN	3,364.06
8	Beechill Business Park	Beechill Road, Belfast, BT8 7QN	2,491.34
		TOTAL	**13,861.21**

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APPENDIX 2: GLOSSARY OF TERMS

The following are some widely-used ‘workplace’ terms contained within the report.

activity based working	no employee 'owns' or has an assigned workstation; rather, the broader workspace provides employees with a variety of predetermined activity areas that allow them to conduct specific tasks.
agile working	a way of working in which an organisation empowers its people to work where, when and how they choose – with maximum flexibility and minimum constraints – to optimise their performance and deliver “best in class” value and. customer service
ancillary space	workspace that supports the individual or team (e.g. local informal meeting spaces, dedicated storage, print / copy)
collaboration space	a space that allows multiple members of staff to come together to share ideas and to collectively work on solutions – often associated with integrated presentation technology
concentration space	a separate space, not necessarily a room, with better acoustic isolation that allows people to work undisturbed – often will limited technology encouraging people to work there for only a short time
co-working spaces	a shared workplace environment, often an office, comprising a range of different settings that can be booked by many unrelated individuals or organisations – increasingly popular due to the flexibility of contracts
incubator space	a type of space that supports new start and growing, entrepreneurial businesses – often these spaces are located close to educational establishments and provide access to business mentors as well as financial and legal advisers
support space	spaces that are shared across the organisation (e.g. reception, central stores, training suites, staff cafe)

APPENDIX 3: SCHEDULE OF ACTIVITIES

date	activity
28/3/18	**haa design** appointed
5/4/18	conference call with GVA NI
26/4/18	meeting with GVA NI (Belfast) meeting with LCCC / site visits (Lisburn)
30/4/18	conference call with GVA NI
17/5/18	conference call with LCCC
24/5/18	workshop with LCCC (Lisburn) / site visits
5/7/18	meeting with LCCC (Lisburn) meeting with Nicola Ledlie (Regus NI) meeting with Colin McCrossan (SIB)
23/7/18	conference call with GVA NI
22/8/18	delivery of draft report
24/9/18	delivery of comments on draft report
2/10/18	conference call with GVA NI
18/10/18	delivery of revised final report
31/1/19	*preliminary date for presentation*

APPENDIX 4: HIGH-LEVEL COMPARISON OF COUNCIL STATISTICS

The information contained in the Invest NI 'Council Area Profile' sheets summarise the latest NISRA statistics available in areas such as the economy & employment and tourism as well as general demographics. The following is not intended to be an exhaustive comparison of performance between Lisburn & Castlereagh City Council (LCCC), Ards & North Down Borough Council (A&ND), Newry, Mourne & Down District Council (NM&D) and the Northern Ireland average, but does provides an interesting snapshot.

demographics (2017)

total population	LCCC	142,640	8% of NI total
	A&ND	160,098	9% of NI total
	NM&D	178,996	10% of NI total

labour market structure (2016)

economically active	LCCC	80%
	A&ND	78%
	NM&D	76%
	NI average	*74%*
in employment	LCCC	71,000 total employed (75% rate) / 8,000 self-employed (12% rate)
	A&ND	71,000 total employed (74% rate) / 11,000 self-employed (16% rate)
	NM&D	79,000 total employed (73% rate) / 16,000 self-employed (20% rate)
	NI	*810,000 total employed (69% rate) / 114,000 self-employed (14% rate)*
claiming benefit	LCCC	2% of population (28% long term unemployed / 25% aged 18-24)
	A&ND	2% of population (34% long term unemployed / 23% aged 18-24)
	NM&D	2% of population (33% long term unemployed / 24% aged 18-24)

job creation (2017)

of the 10,970 additional jobs created in Northern Ireland in 2016/17

LCCC contributed	939
A&ND contributed	240
NM&D contributed	1,059

with the additional jobs falling into the following sectors:

Sector	Advanced Engineerin g &	Agri-Food	Constructio n	Digital & Creativ	Financial, Profession al & Business	Leisure & Touris	Life & Health Sciences
Council							
LCCC	39%	17%	19%	trace	6%	trace	trace
A&ND	27%	16%	3%	6%	45%	trace	trace
NM&D	22%	17%	19%	trace	6%	trace	trace

and according to the businesses by size:

Sector	Micr o 0-9 employees	Smal l 10-49	Mediu m 50-249	Large 250+ employee
Council				
LCCC	29%	48%	18%	5%
A&ND	35%	46%	18%	1%
NM&D	35%	43%	18%	3%

local region business base

businesses by sector (2017)

Sector	Agriculture	Construction	Production (incl. Manufact.)	Services
Council				
LCCC	14%	14%	8%	64%
A&ND	13%	13%	7%	68%
NM&D	27%	17%	6%	49%
NI average	*25%*	*14%*	*7%*	*55%*

no. of registered business (2017)

	Total number	Percentage of NI total businesses
Council		
LCCC	4,640	6%
A&ND	4,555	6%
NM&D	8,110	11%

businesses by size (2017)

Sector	Micr o 0-9 employees	Smal l 10-49	Mediu m 50-249	Large 250+ employee
Council				
LCCC	86%	12%	2%	0.5%
A&ND	88%	10%	1%	0.3%
NM&D	90%	8%	1%	0.1%

employee jobs (2016)

Sector	Constructio	Manufacturin	Services	Othe		Public	Private
Council							
LCCC	5%	9%	85%	1%		32%	68%
A&ND	3%	7%	89%	1%		24%	76%
NM&D	7%	14%	77%	%		25%	75%
NI average	*5%*	*11%*	*83%*	*1%*		*27%*	*73%*

earnings (2017)

Sector	By place of	By place of
Council		
LCCC	£22,922	£21,809
A&ND	£22,729	£20,592
NM&D	£20,800	£20,800
NI average	£21,159	

APPENDIX 5: BELFAST REGION CITY DEAL

The Belfast Region City Deal (BRCD) comprises the six councils of Antrim and Newtownabbey Borough Council, Ards and North Down Borough Council, Belfast City Council, Lisburn and Castlereagh City Council, Mid and East Antrim Borough Council and Newry, Mourne and Down District Council, working in partnership with Queen's University Belfast and Ulster University, Belfast Metropolitan College and the other Further Education colleges in the region.

The initial Belfast City Deal announcement was made in November 2017 during the Chancellor's Autumn Statement[16] and following extensive discussions and preparatory work involving all the partners, the submission of detailed proposals to Westminster was announced on 1st October 2017[17][18].

The Deal's central objective is "*to make the Belfast Region a global investment destination and in so doing, create 20,000 new and better jobs over the next 10 years in the sectors where the region is experiencing most rapid growth and have potential to become world leaders*".

The deal will focus on four key investment pillars:

- digital and innovation
- infrastructure
- tourism led regeneration, and
- skills and employability.

As well as the Hillsborough Tourism Master Plan, LCCC will seek, in partnership with South Eastern Regional College to develop plans for a leading-edge Innovation Hub in the City Centre, creating an e-SERC Centre for Excellence in Innovation and Entrepreneurship.

The Hub, a 3,000m^2 facility comprising lecture and meeting space as well as more informal spaces tailored to creative collaboration will be co-located on the SERC Lisburn Campus adjacent to Castle House (on a SERC owned brown-field site) and will bring together the expertise and experience of further and higher educational establishments in Northern Ireland.

The centre will focus on:

- supporting the development, innovation and implementation of Clean Tech
- supporting the development, innovation and implementation of Industry 4.0 / Society 5 Advanced Manufacturing
- being part of a Maker Space Network consisting of all FE Campuses within the BRCD area

as well as supporting a wide range of business development opportunities. In the short and longer-term e-SERC will benefit:

- start-ups and developed businesses involved in innovation and implementation of new products and improved processes
- manufacturing businesses supporting the development, innovation and implementation of Industry 4.0 / Society 5 in particular Advanced Manufacturing businesses
- start-up and developed businesses requiring support in the development, innovation and implementation of Clean Technology
- nurturing capability improvements for both individuals and businesses and future proofing them by providing upskilling in the use of new and emerging technologies. Within this there will be a focus on engagement mechanisms to reach those that may be living with educational deprivation/ distant from the labour market.

A decision is hoped for during the Chancellor's 2018 Autumn Statement.

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16 https://www.gov.uk/government/publications/autumn-budget-2017-documents/autumn-budget-2017

17 http://www.belfastcity.gov.uk/News/News-97072.aspx

18 https://www.lisburncastlereagh.gov.uk/news/belfast-region-city-deal-proposals-submitted-to-westminster

APPENDIX 6: BACKGROUND INFORMATION – RE-LOCATION OF GOVERNMENT FUNCTIONS

Scottish Natural Heritage

At present Northern Ireland government functions are heavily centralised within Belfast city centre and in areas surrounding Stormont. Historically a similar picture existed in Scotland, with Glasgow and Edinburgh (more so the latter) being the seat of all Scottish Government functions. In 2003 Ministers within the Scottish Government made the decision to move the headquarters of one of the smaller government agencies, Scottish Natural Heritage (SNH), from Edinburgh to Inverness, a distance of c.150 miles. A total of 270 jobs were to be transferred.

At the time this move was not welcomed by staff and unions alike (with up to 75% of staff against the move) with concern over costs and disruption to operations being paramount. While packages were available to staff to assist with re-location or alternative employment opportunities offered within the public sector (for those who, due to family commitments etc., were not in a position to take up the offer) many staff left SNH. The relocation took place between 2003-2006 with the new purpose-built headquarters achieving a very high BREEAM rating.

SNH has nevertheless gone from strength-to-strength, continuing to work in partnership with other agencies and local authorities, as well as with communities and land managers. It was considered a brave move, and one that "had been key in ensuring influence and power were shared across Scotland and not concentrated in the Central Belt" according to the then First Minister, Jack McConnell.

As video conferencing technology has developed, the geographical location of an HQ office has taken on less significance, with board meetings now able to be held virtually pioneering a regional delivery model now being proposed by many government agencies.

Politically, Northern Ireland is not Scotland, certainly not with the present impasse between Westminster and Stormont. In addition, the distance between Edinburgh and Inverness is on a different scale to that between Belfast and Lisburn. The former journey could not be considered a daily commute; however Belfast to Lisburn City Centre is c.20 minutes by car (in light / moderate traffic) or between 12-30 minutes by train from one of the main city centre stations. Geographically it is less than 10 miles making it a highly accessible location.

Implications for Northern Ireland / Lisburn

As discussed at the 'understanding demand' workshop in Lisburn and evidenced by several of the attendees who commute to Lisburn from Belfast on a daily basis, there is no physical (i.e. transport) barrier to any re- location of a government function out of Belfast. Indeed, such a move could arguably free up office space within the capital and assist with any regeneration strategy.

Should a regional delivery model or a 'hub and spoke' combination model in the short / mid-term rather than its existing more centralised model become a reality in the longer term, LCCC is strategically placed, and could actively support the re-location of a government function, or the creation of a small government hub, perhaps within Lisburn City Centre itself which benefits from, direct rail access.

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