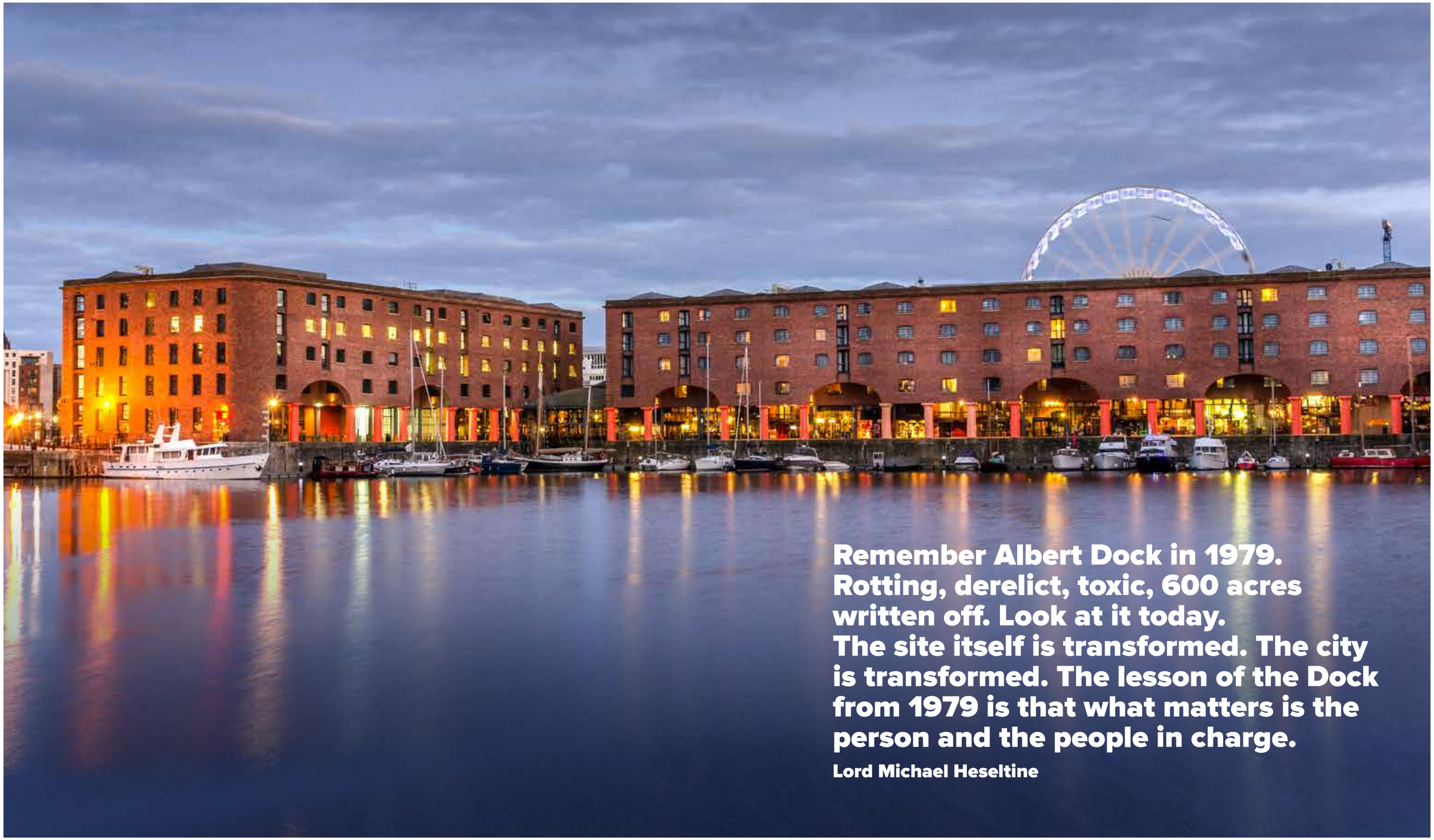
UNIVERSITY OF LIVERPOOL

Heseltine Institute for Public Policy and Practice

Albert Dock: What Part in Liverpool's Continuing Renaissance?

Professor Michael Parkinson CBE and Dr Alex Lord



Remember Albert Dock in 1979. Rotting, derelict, toxic, 600 acres written off. Look at it today. The site itself is transformed. The city is transformed. The lesson of the Dock from 1979 is that what matters is the person and the people in charge.

Lord Michael Heseltine

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I am very pleased to introduce the Heseltine Institute's review of Albert Dock.

As the authors say, the Dock is an iconic symbol of both Liverpool's history and its renaissance – it is emblematic of the city's social, economic and cultural power.

Speaking on behalf of the University of Liverpool I am determined that our talented staff and students will play a central role in supporting the development of the city region. The University is an anchor institution in the North West, and our performance and reputation are intimately linked to our location.

This report demonstrates the powerful contribution that the Heseltine Institute can make in shaping future development in the city region. The Institute plays a critical role in raising and discussing the key issues that face the Liverpool city region and I hope that reading this Review will inspire you to engage with us in the important work that lies ahead.

We would be pleased to hear from you about the key opportunities and challenges that the city region faces as it enters a new stage of its extraordinary revitalisation and I commend this Review to you.

Vice-Chancellor Professor Janet Beer

Acknowledgements

This project could not have been completed without the help and cooperation of a large number of colleagues in Liverpool. First we would like to thank all the people who gave their time to be interviewed and who were so honest but constructive with us. They are identified individually in the appendix. In particular we want to thank John Flamson, ex-Chief Planner of the Merseyside Development Corporation (MDC). Our discussion of the MDC's contribution draws very heavily on his work and wisdom. Ged Fitzgerald, Chief Executive of Liverpool City Council was equally generous with his time and judgement. We are grateful for the work of Les Dolega who undertook the analysis of Liverpool retail and commercial sectors. We are again indebted to Kirsty Smith and Janis Morgan in the Marketing Communications Team of the University of Liverpool for their brilliant design work.

We would especially like to thank Sue Grindrod Chief Executive of Gower Street Estates and Richard Wilson of Aberdeen Asset Management who commissioned the work. They have been excellent clients – supportive but willing to accept critical, constructive comment. Finally we wish to thank the Vice-Chancellor, Professor Janet Beer, for her support of this project and more widely that of the Heseltine Institute.

However we are responsible for any errors of commission or omission.

Michael Parkinson and Alex Lord

CHAPTER 1.

WHAT DOES THIS REPORT DO, HOW AND WHY?

The symbolic importance of Albert Dock for Liverpool

"It is a powerful symbol of the city. Its history speaks for itself."

"It was a beacon of hope that the city had a future."

1.1 Albert Dock is an iconic Liverpool landmark – physically, economically and politically. For almost two centuries its fortunes have reflected those of the city itself. The completion of the Dock in 1846 physically demonstrated Liverpool's position as the second city of the greatest empire the world had ever known. By contrast, the Dock's economic and physical decline during the 1960s and 70s symbolised the end of the era of the city's maritime dominance. The renaissance of Albert Dock in the 1980s then marked the beginning of Liverpool's own renaissance. In 2017 it stands at the centre of a UNESCO World Heritage Site, the UK's largest Grade 1 listed structure in one of the world's most architecturally significant cities. Liverpool itself is embarked on a wider economic and physical regeneration. The Dock's future matters to the future of the city – almost as much as its past did.

The impact of the renaissance of Albert Dock on Liverpool

1.2 Liverpool and its wider city region have undergone a significant economic recovery in the past two decades. But that recovery remains partial and incomplete. Its leaders will need to do even more in future with their key assets if they are to create a competitive European – let alone global – city. Albert Dock is one of these assets which has made an enormous contribution to the city's recent recovery already.

1.3 In the 1980s its renaissance stimulated initial interest in tourism and the visitor economy which has grown into one of the key drivers of Liverpool's economy. It helped create a city centre housing market which has subsequently flourished. And it encouraged the growth of retail and leisure activities in the city centre. More symbolically, the renaissance of Albert Dock marked the emergence of a different kind of politics in Liverpool and substantially improved the city's relationships with national government, as well as relationships between the public and private sectors inside the city. Arguably Albert Dock's success contributed to a growing internal self-confidence and external trust in Liverpool which has fuelled its continuing renaissance.

What's next for Albert Dock?

"Albert Dock is at an important cross road."

1.4 Albert Dock itself stands at an important point in its development. Its leaders wish to increase the economic, social and cultural contribution it makes to the Liverpool waterfront, city centre and city region. Gower Street Estates which holds the freehold of Albert Dock is anxious to increase its impact and profile. And Aberdeen Assert Management, who recently bought the majority of the commercial elements of Albert Dock, has ambitious plans for its future development. Liverpool city region itself is going through important changes with the construction of new governance machinery including an elected Mayor, all of which has increased interest in the development of a sustainable, modern economic strategy for the city region.

What's in this report?

1.5 The Heseltine Institute for Public Policy and Practice was invited to undertake this report jointly by Gower Street Estates and Aberdeen Asset Management. They both had an interest in understanding: (i) how Albert Dock had contributed to Liverpool's growth in the past, (ii) what its partners in Liverpool city region thought about the Dock's current and future performance and relationships and (iii) how Albert Dock could build upon its past achievements and make an even greater contribution to the continuing renaissance of Liverpool waterfront, city centre and city region. They invited us to carry out an honest, independent review of those issues.

1.6 Our report is based on a range of different evidence. We have reviewed the relatively limited literature that exists about the Dock. We have analysed national level data on the commercial and retail performance of the Dock in comparison with other parts of the Liverpool city centre economy. However, our most important evidence is the interviews we held with a range of stakeholders and partners who work with Albert Dock and have clear views about its performance and prospects. In those Chatham House rules interviews we sought honest answers to the following questions:

- What is the role, significance and value of Albert Dock?
- What has been its recent contribution to Liverpool's economic, cultural, physical and institutional development?
- What are its future prospects?
- What should be done by whom to maximise its current opportunities?

1.7 The report covers a range of territory – economic performance, cultural and social contribution, partner relationships and governance. We have tried to make it robust but accessible to a wide audience so it might influence the future behaviour and attitudes of stakeholders in Albert Dock. We have used quotes at key points to give colour to the argument and analysis. Since our interviews were conducted on a Chatham House basis, we do not identify the source. But they represent the views of a majority of our interviewees not those of a minority. We name the interviewees in the Appendix.

1.8 To anticipate our story, Albert Dock has come a long way in a short time and makes a big contribution to the Liverpool economy, society and culture. Nevertheless, it could and should achieve even more in future given the changing nature of Liverpool's economy, politics and relationships. The key message of this report is the opportunity and need for leaders to build upon, deepen and widen the success of Albert Dock and make a continuing contribution not only to the Liverpool waterfront and city centre but to the city region. Albert Dock is not a merely local amenity but a fantastic international asset, possibly one of the world's most recognisable visual images. Plans for its future development should reflect its international status and globally significant past. As Daniel Burnham, the architect of Chicago once said: "Make no little plans. They have no magic to stir men's blood and probably themselves will not be realised. Make big plans. Aim high in work and life..." Jesse Hartley did not make little plans in 1846. The current custodians of his achievement must be equally ambitious. And they have a real opportunity to be so.

CHAPTER 2.

HOW DID WE GET TO HERE? A NANO HISTORY OF ALBERT DOCK

From symbol of Empire, to bombed out dereliction, to urban renaissance

2.1 Liverpool became the second city of the British Empire in the mid-19th century. The massive growth of the city as a global maritime force led to a huge dock extension throughout the 19th century which eventually stretched seven miles along the Mersey riverfront. A series of docks – Canning, Princes, Waterloo and Clarence – opened in the 1830s. The biggest development took place in the 1840s with the opening of the massive Albert Dock itself, built by Jesse Hartley in 1846. Growth continued throughout the century with Hartley's Wapping Dock completed in 1852 and the Stanley Dock tobacco warehouse in 1901.

2.2 Albert Dock was the first inland, secure dock designed to protect its ships, goods and workers from the winds and weather of the River Mersey. The Dock's fortunes rose and fell with those of the port itself and the city. It was hit by world depression in the 1930s. During the Second World War the docks were taken over by the Admiralty and suffered significant damage from German bombing, with about 15% being destroyed. After the war Albert Dock was given Grade 1 listed status, as the docks were improved and repaired during the 1950s. But the decline of the British Empire coupled with technological change and the increased size of ships, posed big economic and physical challenges to Liverpool's maritime dominance.

2.3 The gradual decline in trade through the port of Liverpool after the war meant that the entire south docks, including Albert Dock, were finally made redundant in 1972. The docks north of Pier Head continued to operate. Although in the 1960s the Mersey Docks and Harbour Company had actively considered the abolition of Albert Dock, in 1976 Liverpool City Council included it in a Conservation Area. During this period a whole series of plans and proposals from demolition, to relocating the polytechnic, to building the world's tallest building were mooted. But none came to pass. By the 1970s Albert Dock lay derelict and abandoned, cut off by the high dock wall from the city a few hundred yards away that had provided its original reason for existence.

2.4 The complex could have been lost to Liverpool if it were not for the intervention of Michael Heseltine, the Secretary of State for the Environment and his creation in 1981 of the Merseyside Development Corporation (MDC). Although politically controversial because it took control away from the city council and put planning powers and money in the hands of a national quango, the MDC was the crucial first piece in the jigsaw of Liverpool's physical renaissance. Its simple mission in 1981 was to reclaim and regenerate Albert Dock. By 1988 the refurbishment of the Dock itself was complete and it and the Tate Liverpool were opened. The Arrowcroft Group, the London based investors who saw the potential of the Dock from the start as partners with MDC, provided the bulk of private sector funds for development. Their role was also crucial.

2.5 In 2017, Albert Dock is a successful multi-use complex with shops, bars, restaurants, hotels, offices, housing and cultural attractions, surrounded by open public space and a huge water space. It attracts 6 million visitors a year. The whole area is a site for many public events and festivals and sits at the centre of a World Heritage Site, which places it firmly on an international stage. Albert Dock is clearly a success story. But its leaders now face key questions about its future contribution to the city.


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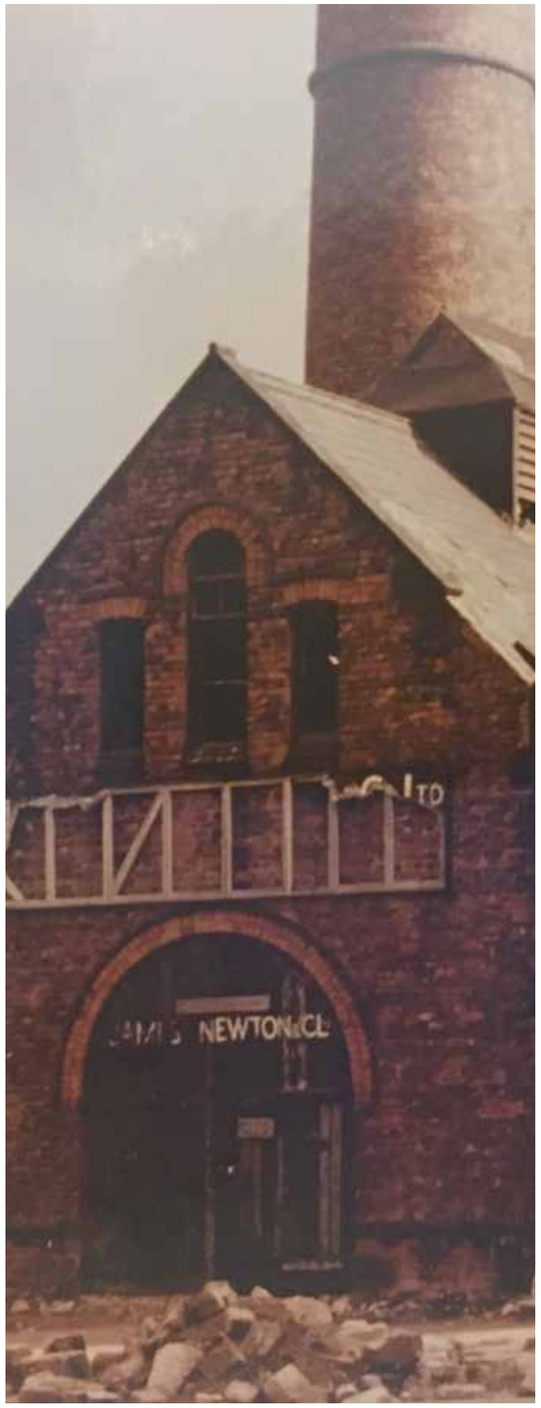
CHAPTER 3.
HOW DID ALBERT DOCK RENAISSANCE BEGIN? THE WORK OF THE MERSEYSIDE DEVELOPMENT CORPORATION 1981-1997



What challenges did the MDC face?

3.1 In many ways Albert Dock was a leap of faith by the Merseyside Development Corporation which paid off despite the huge challenges it faced when it was set up in 1981. Those challenges were both national and local – and economic, physical, political and social. To start with, it began its work during a difficult national economic and political context. There was a combative Conservative government led by Prime Minister Margaret Thatcher during a politically troubled period. There was a recession at the time with unemployment in 1981 almost 3 million. The Falklands war in 1982 was followed by the equally divisive miners' strike in 1984-85.

3.2 In Liverpool itself the times were equally challenging. The city's population collapsed from 800,000 after the war to 516,000 in 1982 and 463,000 in 1990. Employment fell from 260,000 to 217,000 between 1981 and 1989. Between 1979 and 1984 alone the city lost 44,000 manufacturing jobs. Unemployment rose from 9.2% in 1975 to over 20% in 1981, more than double the national figure. The city had a dependent community of older, less skilled residents. The times were politically troubled also. There had been riots in Toxteth in 1981. Between 1983 and 1987 the city council was controlled by the Militant Tendency which fought with the Thatcher government. There were terrible football tragedies in Heysel and Hillsborough in 1985 and 1989. As a result of all these factors, there were swathes of physical dereliction across Liverpool; the city had a poor external image; the market was depressed; investment levels were low; the city's politics were divisive with conflicts and tensions between it and government and between the city's public and private sectors. The economically redundant and physically derelict Albert Dock complex itself was a massive challenge to the Merseyside Development Corporation. It had deteriorated terribly during the period it was mothballed and posed huge physical, environmental and financial problems. The MDC was dealt a difficult hand, to say the least.

3.3 In response the Corporation developed a three pronged strategy: to restore the overall water space in the south docks; to hold the International Garden Festival in 1984 and to redevelop Albert Dock itself. Albert Dock was MDC's jewel in the crown. MDC planned, as had been done in Boston, Baltimore and London, to exploit the Dock's architectural and heritage assets and turn a private run-down dockyard into a public playground and visitor destination with residential, retail, commercial and cultural facilities. Albert Dock was intended to act as a catalyst for development in the neighbouring docklands and the city centre. More widely MDC hoped that regenerating the Dock would improve the image of Liverpool and hence it's standing as an investment location and visitor destination.

What did the MDC achieve? Some downsides but more success

3.4 The MDC was always intended to be a time limited intervention by national government. When it was closed in 1997 arguably it was on the way to realising many of its ambitions. It had created an historic heritage site and an attractive public realm. The Merseyside Maritime Museum was installed along with Tate Liverpool and the Beatles Story. There was a programme of events and festivals around the water. There were a series of mid-market restaurants, shops, bars and cafes and coffee shops. There was a genuine commercial offer with speciality shops, Granada Television, offices and a hotel. There were more than 150 expensive river view apartments in the Colonnades. The place had undergone significant physical, cultural and economic change in just over a decade.

3.5 However, MDC's record was not unalloyed. Political instability in the city council had made its task challenging. The investment market remained sluggish. It took time to shake off the poor image of the city of Liverpool. The MDC itself remained politically unpopular in some parts of Liverpool. Some of its new build speculative developments were not of the highest quality. Links between Albert Dock and the city centre had been improved but remained under-developed. Nevertheless, the Dock was in good order when MDC went out of business.

3.6 Neither the MDC nor the government had thought the Dock would be a stand-alone project but rather the start of a long term programme for the Liverpool waterfront. It began that process and paved the way for later progress, even if it was slower than the MDC and some others had hoped. There could not have been the level of future development on the waterfront if Albert Dock itself had remained derelict. The Dock also had an impact upon the wider Liverpool market. The city's image and investor confidence in it, which underpin land values and rental levels, had been fragile. The regeneration of Albert Dock helped increase them all, especially by doing work of higher quality than typically found at that time in the city. It also began the process of improving relationships between the public and private sectors in Liverpool.

3.7 The MDC arguably had a very successful first act which others built upon. But it also sowed some of the seeds of the challenges which the Dock continues to face. They will need to be addressed if Albert Dock is to make a greater contribution to the continuing, if unfinished, renaissance of Liverpool and the wider city region. We turn to these successes and challenges in the next part of this report.

CHAPTER 4.
WHERE DOES ALBERT DOCK STAND NOW?

4.1 The period from 1981-97 was the first act in the drama of the renaissance of Albert Dock and Liverpool's waterfront. Initially after the MDC finished its work, there was a temporary loss of momentum as responsibility for the area was divided up between a range of different organisations and players. For a time, those involved in managing and leading the complex found it difficult to capitalise upon the original work of the MDC. However, momentum was increasingly regained in the mid-2000s with Gower Street Estates leading the campaign to reanimate, reposition and refocus attention on the Dock. This was massively reinforced by Liverpool winning in 2003 the title of European Capital of Culture for 2008, which focused huge attention on the city centre and waterfront. The other crucial factor was the decision by Grosvenor Estates to undertake the Liverpool One development immediately across the Strand from Albert Dock and waterfront.

4.2 Everyone agrees it is now the right time to take a fresh look at the future of Albert Dock in a wider Liverpool context. In fact, there is considerable agreement on what the Dock has brought to the waterfront area and the contribution it has made in the years after the MDC closed – and what remains to be done. Stakeholders agree that it has been a catalyst for regeneration, started quality environmental improvements, invested in under-exploited sectors of the economy and helped change internal and external perceptions and the city's political standing.
There is equal agreement on the range of challenges the Dock and its partners now face and must resolve if they are to be more successful in future. Those issues are about strategic economic ambitions, markets, quality, governance and connectivity. In this chapter we explore these issues. In the final chapter we spell out the implications of who needs to do what differently in future.

Catalyst for regeneration

"The Chief Executive told me to string up some lights on the roof of the derelict Albert Dock. But I said – there is nothing there. I know that, he said, we're telling people there is going to be!"

4.3 Everybody agrees that Albert Dock was the catalyst for the renaissance of Liverpool city centre. It did the city a real service during a very difficult period. In 2017 Albert Dock is clearly a successful visitor attraction that has grown steadily during the past decade and now has over 6 million visitors. Albert Dock began the process of improving relationships, attitudes and performance. Its scale and visibility meant its contribution could not be ignored. It paved the way for future market confidence, investment and development beyond the waterfront in the city centre more widely. It was a beacon of light during some dark days.

4.4 Most significantly the MDC's regeneration of the Dock during the 1980s paved the way in the 1990s and 2000s for huge investment by the European Union Objective 1 Programme for Merseyside. EU funding supported major developments on the waterfront in the Princes Dock north of Albert Dock, with the Arena and Convention centre south of Albert Dock and with the completion of the Leeds Liverpool canal, the cruise liner terminal and the Museum of Liverpool at the Pier Head. This would not have happened without the earlier catalytic achievements at Albert Dock.

Physical change

"Before, it was a blank space on the map. There were no memories. Now it is iconic and gives us a strong visual identity."

4.5 The physical changes, especially the conversion of the original dock buildings and the water space in and around Albert Dock, have done a huge amount to raise expectations and quality standards in a city which had experienced relatively little quality development or redevelopment before the 1980s.
When the MDC took over, the Dock was divorced from the city centre and cut off by a major highway – the Strand. Even though more has to be done, the two have clearly been reconnected so that the waterfront at least now seems part of a single city. Indeed, the development of the waterfront has encouraged the building out and integration of the different parts of the city around its retail, leisure, culture, business and knowledge quarters. The improved environmental standards and greater integration of the previously disconnected parts of the city centre owe much to the initial achievements at Albert Dock. As one of its architects said at the time:

"The waterfront has been nationalised and democratised and has become a public rather than privatised space."

Economic change

4.6 The Dock began initiatives in the 1980s in culture, tourism, retail and leisure which underlined the potential of those sectors for Liverpool's future economy. At that time, for example, tourism was not seen as real work and the economic potential of culture was undervalued. These are now acknowledged key drivers of the Liverpool city region (LRC) economy. The visitor economy in particular is a major sector which employs over 50,000 people and contributes over £4bn to LCR economy. The city had over 33 million visitors in 2015 and was the 6th most visited city in the UK by overseas visitors and the 7th by domestic visitors. The Tate Liverpool, Maritime Museum and the Museum of Liverpool attract over 2 million visitors a year. The city centre housing market has increased to over 20,000 whereas it was non-existent before the work on Albert Dock and the surrounding south docks.

"As an attraction it is one of the reasons to visit Liverpool. It's a manifestation of what Liverpool is. It has created new life and led to development beyond."

Changed political values and relationships

4.7 It is now hard to remember how difficult were the political and institutional relationships within Liverpool and between it and government just over a decade ago. That picture has changed dramatically for many reasons. But the redevelopment of Albert Dock played a significant part in changing political attitudes and relationships within Liverpool. It helped to encourage economic confidence and investment. It improved relationships between government and the city since they had a combined interest in the Dock being successful. It encouraged other investors to see the market potential of Liverpool city centre. For example, the equally iconic Liverpool One complex would not have happened without the revitalised waterfront. The renaissance of the Dock encouraged confidence, hope and investment. These are subtle issues and often difficult to measure. But all our interviewees were convinced that progress on Albert Dock helps explain the political progress of and within Liverpool in the past decade.

But other parts of the city have raised their game

"In the 1980s it lit the torch for the city. But forty years on it needs a new vision.

4.8 In assessing the Dock's standing today, it is important to remember how much Liverpool has changed in the past decade – physically, economically and culturally. Albert Dock has been dramatically transformed. But its very success has also affected its own relative standing. The simple fact is that during the 1980s and early 90s Albert Dock was the only part of the city which was prospering and hence it was the market leader. But since then, and partly because of its pioneering efforts and achievements, Liverpool city centre has changed dramatically. There has been substantial investment in many different parts of the city centre. Its offer has been expanded, diversified and significantly improved– commercially, culturally, and architecturally. Liverpool is virtually unrecognisable from the depressed – and depressing – city centre it seemed to be only a decade or so ago.

4.9 For example, the £1.4bn Liverpool One project, which lies just across the Strand from Albert Dock, is one of the biggest and arguably best mixed use developments in Western Europe. It has transformed the city's retail and leisure offer and has repositioned Liverpool on the national and international stage. To the north of Albert Dock, developments on Mann Island, the Museum of Liverpool, the extended Leeds Liverpool canal and public realm improvements at Pier Head and at Princes Dock match the development of the city's Central Business District and office quarter. To the south of Albert Dock the development of the Arena, Convention and Exhibition Centre, hotels and residential units on Kings Dock have also significantly improved Liverpool's standing and performance as a visitor economy. Just further south from Albert Dock the emergence of the Baltic Triangle creative quarter has brought new jobs, economic activities, housing and cultural facilities which are cool, modern, and funky – challenging the old order of Liverpool's more conventional city centre offer.

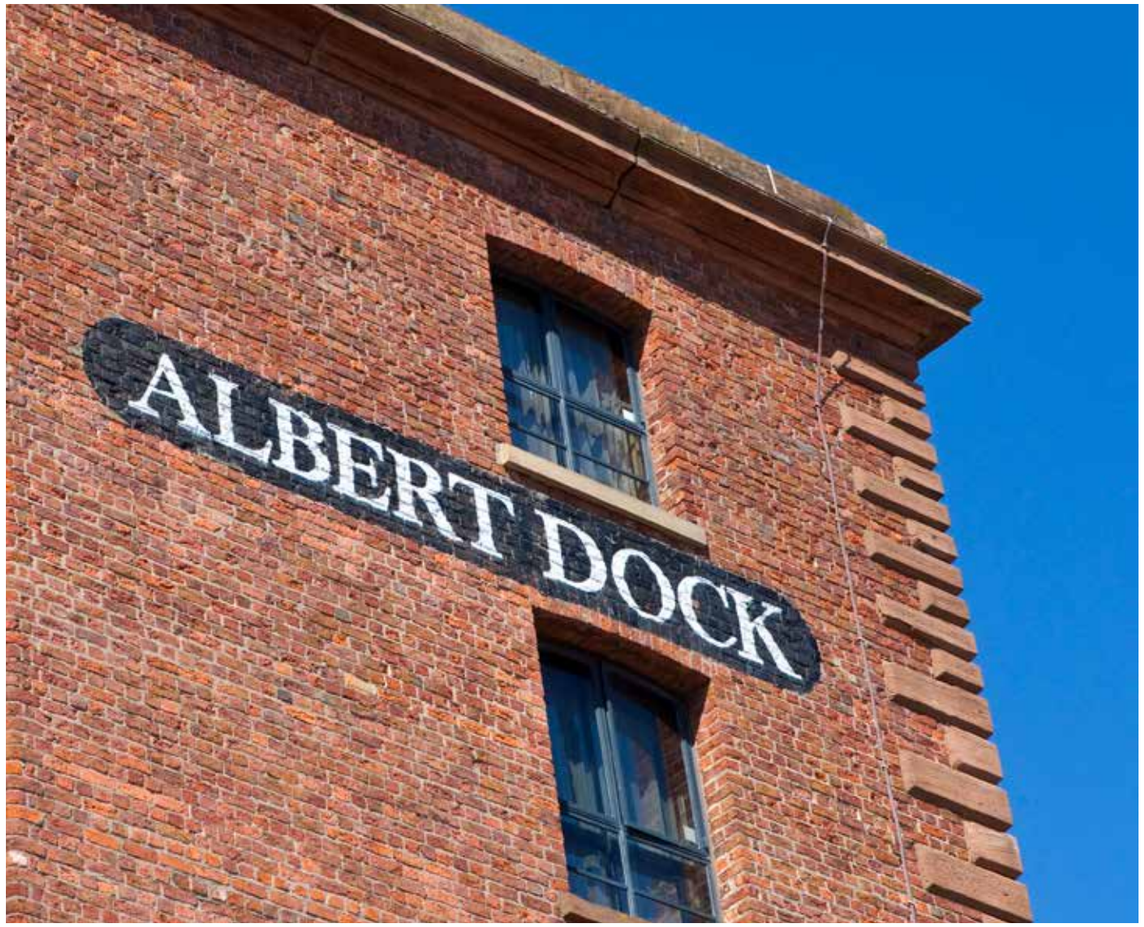
4.10 There has been similar expansion of the independent sectors in the Ropewalks area and on Bold Street which again has dramatically improved the range and quality of the city centre offer. At the top of the existing retail quarter there have been major investments in the city's Knowledge Quarter as three universities, the Royal Liverpool University Hospital, the Liverpool School of Tropical Medicine, major cultural organisations and private developers have invested in their physical facilities and services for their students, customers and residents. So the offer from other competing parts of Liverpool has been substantially improved in the past decade. Albert Dock was once a leader and pace setter in terms of offer, quality and appearance. But times have changed. It no longer is.

"Back then it was good – avant garde and slightly quirky. But things have moved on."

"Other parts of the city have grown up. The Dock has lost its distinctive offer."

Facing challenges

4.11 So in 2017 Albert Dock leaders face some important challenges and choices. Some of them are essentially internal that its owners, managers and tenants need to address. Some are external and concern the relationships of Albert Dock to the wider Liverpool waterfront, city centre and city regional economy. These will have to be worked out in collaboration with external partners. Both matter. But meeting the wider external challenges will be crucial if the Dock complex is to have a prosperous and sustainable future in the changed market, institutional and cultural context it faces. The challenges are about quality, clarity about market, integration and connectivity, internal governance and external relationships.



Raising quality

4.12 There is a widely held view that the overall product at the Albert Dock is no longer good enough. One common explanation was that the Dock leaders did not have a sufficiently entrepreneurial, expansive approach to the Dock. They did not have a clear enough plan for the market or products they wanted to develop. As a result, the quality and offer of tenants in the Dock varied enormously. This eventually was reflected in the quality of the overall offer in the Dock.

4.13 There is now concern that too many of the attractions in the Dock are not high enough quality. In particular, the retail offer is relatively down market. It certainly does not compare well with the diverse offer that is available a few hundred yards away in Liverpool One. The bars have varied over the years. At some points there were concerns about the night time economy, including safety as well as noise for the residents. It is argued that new leases to bars have improved the quality. But the concern remains for many people. In the public's eyes the Dock seems a little old fashioned and a little 'old Liverpool' in contrast with avant garde funky atmosphere and product of, for example, the Baltic Quarter.

"There's no single brand. There is no statement of intent. It is a mixture of everything. Who is it for? What is its offer? What is its strategy for the future?"

4.14 These quality issues have been reinforced by the fact that the public institutions in the complex – the Tate Gallery and Museums – in recent years have had significant resource cuts from government and have not been able to upgrade their facilities and offer as often as they might have wished.

"If you had the choice would you go to Albert Dock for a drink or Camp and Furnace?"

"There are too many people walking around not sure what to do. The cultural attraction pulls people in. But the restaurants are hit and miss. The bars are tired and tacky. The shops are dreadful."

Defining its real markets, product and customers?

"There is not a sufficiently clear story or narrative for the Dock."

"Liverpool One has been clear from the start who are its different markets and how they fit. South John Street is the high street. Paradise Street is for the 20 something's. Peter Street is for the high end. The Dock has never had such clarity or a plan."

4.15 The concern about quality is derived from a more general view that Albert Dock has not sufficiently considered what its real market, product and customers are now that Liverpool has experienced its renaissance. Many ask whether the Dock is primarily for cheaper weekend visitors, high end conference attendees, international tourists from the cruise liners, or the local community. Most argue that it falls between audiences, satisfying none of them.

"Do we really understand our market? What do different kinds of visitors want? Do we make the right package for them? How do the interests of the museum visitors and the other visitors connect? Can we get cross over?"

"The only thing with leisure is capturing a market. The Dock does not – but it could. Without clarity on that it will not work."

"The key to success with leisure is capturing locals. The rest are a bonus. Albert Dock has just not done that."

4.16 There is a widespread concern that Albert Dock simply does not attract enough local people consistently. And all the different sectors want this to improve. The Tate wants more regular local visitors, as do the Museums, shops, restaurants and bars. But there is a feeling the Dock has become the prerogative of the weekend tourists – and is not an attractive option for local people.

"The tourists will come – but will they come back again?"

"The Dock belongs to the people. It must be seen as theirs."

"We want and need to get the Liverpudlian audience re-engaged with the Dock. We need to get it into the natural bloodstream and not just for tourists."

4.17 The most recent survey of visitors to the Dock reinforces such concerns about quality, connectivity and clarity of market. For example, the Dock did attract over 6 million visitors in 2015, up from 4.5 million in 2009. But at its peak in 2000 it attracted over 9 million. There were relatively few return visitors. Almost half were visiting for the first time. Less than 10% of visitors came as often as once a month, less than 5% once a week. Visitors did not stay very long – typically less than three hours. Over 40% were day visitors and were not tempted to stay longer in the city. Only 10% of visitors came from Liverpool and 16% from the rest of the city region. 15% came for the North West, 45% from the rest of the UK and 15% from overseas. The most common reason for visiting was described as 'general sightseeing.' The next most common reason was the Maritime Museum. But the Museum aside, the Dock does not seem to be known or cited for any specific, unique offer beyond its building and environment. In fact, the Dock does well on many of those general criteria. Visitors rate the Dock very highly for its friendly atmosphere, its welcoming style, its safety, cleanliness, ease of access. Satisfaction levels were over 80%.

4.18 But there is less satisfaction with: the number of things going on in and around the Dock, the choice of bars and cafes, the retail offer, its value for money and signage. Visitors were also concerned that the complex closed early and that it was generally quiet in the evening. The average spend of visitors also suggests a better offer might generate more income. Staying visitors spent about £80 visit, although this was much lower than the £130 of two years earlier. Day visitors spent about £16 a person, Liverpool residents slightly less.

4.19 In fact a large majority of visitors were satisfied by many aspects of their visit and found their experience a good one. Hardly any were significantly disappointed. Almost three quarters would recommend a visit to others. And over 85% of international visitors would recommend others to visit. There is a lot to build upon. But their views do confirm many of the partners' concerns about how and where the Dock needs to do better in future. The Dock is in no sense a failure. But it is a missed opportunity. A better focused, higher quality offer would probably attract more visitors to come, to stay longer and to spend more money.

Figure 1: Geography of retail in liverpool city centre

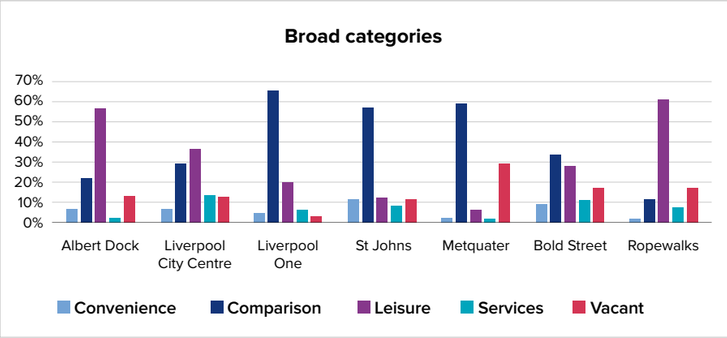


Figure 2: Geography of retail composition in Liverpool city centre

Where does Albert Dock fit in the city centre offer?

4.20 The MDC's original objective of stabilising the Dock's economy by insulating it from commercial pressures has contributed to its separation from the rest of the city centre. However, as the economy of Liverpool city centre has changed dramatically from the 1980s it now makes little sense to think of Albert Dock in these terms. The advent of multi-channel retail and the exponential growth of online retail has had profound effects on high streets the world over. The retail and leisure of the dock cannot be protected from these global changes. Albert Dock must be seen in its city centre context. Figure 1 shows how Albert Dock relates physically to other parts of the city centre.

4.21 The Dock's performance must be seen in relation to those different parts of the city centre. In 2015 the annual average rateable value in Liverpool city centre was £271m². Liverpool's vacancy rate in 2015 was 13.2%, in line with the national average and substantially lower than the average of 16.4% for the North West. Across the whole city centre, there is a good range of convenience and service outlets. However, comparison goods retailers and leisure outlets have the highest presence. (Figure 2).

A changing city centre

4.22 Liverpool One has shifted the centre of the retail core. As the largest and most attractive shopping centre in Liverpool it now commands the highest annual average rateable value at £553m² with a vacancy rate of just 3.2%. This is very low compared to the national average for shopping centres, which in 2015 was 14.8%. Anchored by Debenhams and John Lewis, Liverpool One is dominated by comparison goods retailers which are popular national and international chains. It also provides a significant leisure offer with 37 outlets, the majority of which are chain restaurants and coffee shops, and is anchored by a 14-screen Odeon cinema. (Figure 3).

4.23 St Johns is the second largest shopping centre in the city. However, with an average annual rateable value of just £268m² it provides a different retail offer directed more towards discount stores and a local, as opposed to visitor, market. This contrasts with the Metquarter, a relatively small shopping centre which consists primarily of boutique stores with a higher average rateable value of £406m². It has the second highest proportion of comparison goods retailers to Liverpool One at 59.1 %. But it focuses directly on the luxury segment of the market, particularly in fashion and jewellery. However it also has a high vacancy rate at 29.5% – significantly above the city and national averages.

4.24 Bold Street – a 'bohemian' style shopping street is known for its independent retailers and service providers. The average rateable value is lower than the city centre average (£198m²) and is dominated by independent comparison goods retailers (33.9%) and leisure outlets (28.1%). The proportion of vacant units was relatively high at 17.4%. Bold Street's leisure offer with the total of 34 outlets is dominated by coffee shops and tea rooms and restaurants, most of which are independently owned and operated.

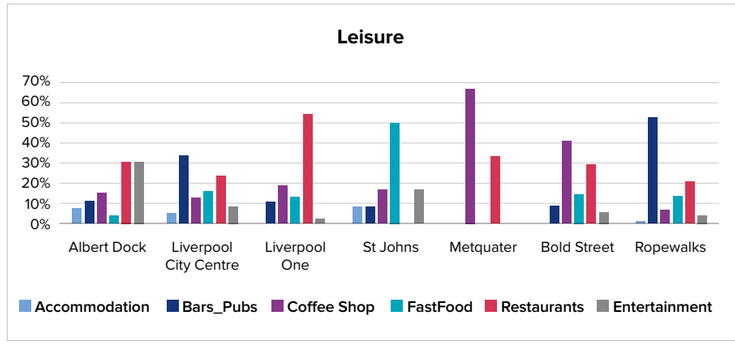


Figure 3: Geography of the leisure economy in Liverpool city centre

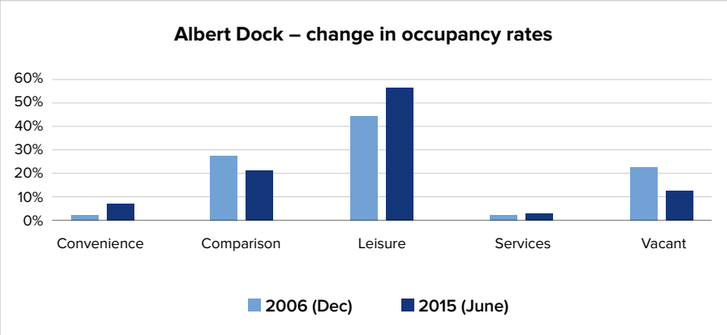


Figure 4: Changes in occupancy rates at Albert Dock 2006-2015

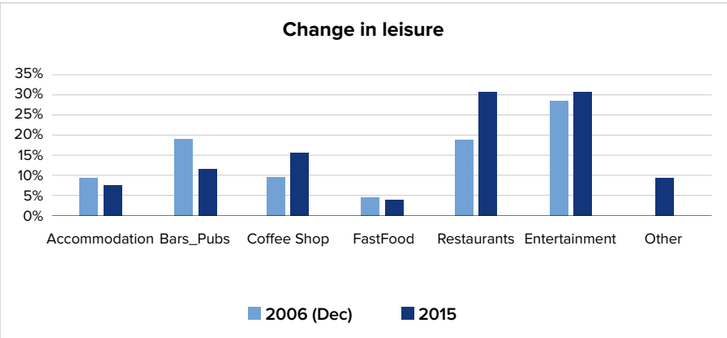


Figure 5: Changes in the leisure offer at Albert Dock 2006-2015

4.25 Ropewalks is a leisure oriented area, the core of Liverpool's night time economy. Leisure units dominate, with 59% occupancy rate, of which 52.8% were bars, pubs and clubs, 20.8% restaurants and 13.9% fast food outlets. Despite cheap rents with rateable value annual average at £89m², the vacancy rate is relatively high at 17.2%. The services offer consists almost entirely of health and beauty outlets and the comparison retail comprises mainly art related and independent fashion shops, complementing the nearby Bold Street offer.

4.26 Albert Dock exists within this congested landscape of a highly segmented retail environment. The Dock has 46 units, making it a potentially significant concentration of retail and leisure activity. But its average annual rateable value is just £186m². This puts the Dock below both Bold Street and the discount store-orientated St Johns centre. Most tellingly, rateable values are approximately one third of those in Liverpool One.

4.27 As the most visited free tourist attraction in North West England, Albert Dock should be able to command higher values. In most harbour cities the waterfront is the primary growth pole. As the core component of a UNESCO world heritage site, the Dock is underperforming quite significantly as a centre of retail and leisure activity. If the Dock is to capitalise fully on its attractiveness as a tourist destination, a more coherent strategy is required to differentiate its offer from those other segments of the market that are amply provided for elsewhere in the city centre: the luxury Metquarter, the independents of Bold Street and the Ropewalks, the discount retailers of St Johns.

4.28 The Dock is a mixed development without a clear and coherent specialism. Leisure outlets are a slim majority (56.5%) of the total number of units. Of these, two types of leisure occupiers dominate: entertainment and restaurants, each with 30.8% share of the total leisure outlets. The entertainment offer consists of five free destination attractions including the Maritime Museum and Tate. The restaurant offer is dominated by mid-range and inexpensive outlets complemented by two bars, one public house, four coffee shops and one fast food outlet. However, there are also two national chain hotels in Albert Dock and an additional two large hotels nearby, less than five minutes walk away. These four hotels with more than 800 rooms combined alongside the Liverpool Convention Centre and Echo Arena could provide some clear advantages in terms of additional footfall compared to the other areas of the city centre.

4.29 The dock's vacancy rate at 13%, although in line with the city average, is well above Liverpool One with 3.2%. It is also above what might be expected from such a significant asset on the city's waterfront. However, this figure does represent an improvement. In 2006 there were 47 retail and leisure units of which 11 were vacant, compared to 6 empty units in 2015. Changes in retail and leisure offer at the Dock and occupancy rates are shown in Figures 4 and 5. Our earlier evidence suggests that these changes are not the result of a clear strategy.

4.30 Overall Albert Dock does not compare well with other significant retail and leisure areas in the city centre. As a nationally and internationally significant tourist destination at the centre of a UNESCO world heritage waterfront, it is incongruous for the Dock to command relatively low rental values and to suffer relatively high vacancy rates. The comparison with the Liverpool One development is stark.

4.31 Much of the reason for the Dock's under-performance stems from the absence of a clear strategy about what Albert Dock should 'be' in retail and leisure terms. In a retail economy where competition is strong and developments jostle for space it is clear that Albert Dock has so far failed to capitalise fully on many of its advantages.

Not well enough connected, integrated or animated

"There is still a big strategic challenge to reconnect the Dock to the city centre."

"The Dock needs to be much better animated and much better integrated."

4.32 There are also real concerns that, despite the efforts and improvements in recent years, Albert Dock does not connect sufficiently well with the areas around it. For example, Kings Dock the immediate area to the south which now has the very successful new build Arena, Convention and Exhibition centre and hotels is not that well-connected to Albert Dock area a few hundred yards away. There is not enough evidence that the visitors to those facilities are considered as potential overlapping audiences. These are missed opportunities because the Arena and Convention and Exhibition centre bring huge numbers of people to the area but they are not systematically drawn into Albert Dock because its offer is not one they want or appreciate. Similarly, the retail offer in Liverpool One, although essentially a mainstream offer, is superior to Albert Dock. The Dock needs to think more about its particular niche in terms of retail and leisure and how it can best complement Liverpool One but differentiate its offer at the same time.

"The sum of the parts doesn't add up."

4.33 Physically, despite the easier access from Liverpool One the Strand still is a barrier in many people's minds. Although it can be exaggerated, it deters people moving freely from the main city centre to the docks. This divorce is aggravated by the Dock parking problems. They lost thousands of free spaces on Kings Dock when it was developed and as a consequence limited paid parking has been a deterrent to people crossing over from the Strand and Liverpool One to the Dock. In addition, the Dock complex is not well signposted, so it is not clear to the visitor what they will find next. There are also concerns that during the winter season the Dock is much less attractive to users than in the summer. Its winter offer needs to be improved. One aspect of this is that some employers think that the area is not sufficiently well lit at night either to attract people or to provide peace of mind to their employees about security.

"The Strand is still scary to cross. The whole area needs to be much better lit. During the winter it looks too gloomy and some staff are concerned about walking through after dark.'

4.34 The city has grown up around it but the Dock has not noticed properly. For example, there is a developing residential community around the south docks but Albert Dock makes little attempt to draw them into its fold. Some argue that the overall marketing of Albert Dock as part of the waterfront offer is not yet right. Also, there is a view that the different organisations and interests in the area do not have a coherent offer for the visitor which leads them seamlessly through the range of facilities that is on offer. Do the restaurants make plans for the many Convention and Arena visitors? More widely it is argued that the owners do not sweat the asset intelligently. It is not presented in a modern way for modern tastes. The complex is not well structured. The different activities are too mixed up. It is not clear who – if anyone – is masterminding the whole development. It has been compared unfavourably to the management style and approach of the Trafford Centre, which is a physically much less impressive but commercially far more successful operation.

"The Dock, the Arena, Convention and Exhibition Centre must be much better linked. The museums are still too separate from the commercial elements."

"The big problem is that connections are east west rather than north south. You enter the Dock and leave it rather than cross from it to Mann Island and the Pier Head or cross to the Arena and Convention Centre. It needs a few simple bridges to connect them, but nobody has any money."

Governance of the Dock needs strengthening

"There is a lack of leadership across the Dock and across the whole waterfront."

4.35 Some of the issues that will face Albert Dock leadership and its partners arise from the specific arrangements made by the Merseyside Development Corporation for the management of the Dock complex after the MDC ended its life in 1997. It wanted to ensure that both the future of the Dock would be secure and in particular that the overall development of the complex would be protected from undue commercial pressures. It developed a complex set of arrangements between the range of partners who had been involved. The leasehold of the properties remained with Arrowcroft Estates which, as part of Albert Dock Company along with MDC, had owned and managed the commercial elements of the Dock after its regeneration in the 1980s.

The waters surrounding the Dock were put in to the hands of the British Waterways. National Museum Liverpool was given ownership of one part of the Dock. And the overall responsibility for the Dock, its public realm and its freehold was given to Gower Street Estates.

"Who owns what? Who controls what? Nobody really knows! The big problem is that ownership of everything is divided and no one is in control."

4.36 Today the model on which Albert Dock operates is complex. Gower Street Estates owns the freehold. The bulk but not all the commercial interests are owned by Aberdeen Asset Management, on behalf of Lloyds TSB Pension Fund. Leading lease holders of Gower Street Estates include Tate Liverpool, National Museums Liverpool and Albert Dock Residents Association. The latter are currently buying out their assets from Arrowcroft. The governance model is not fit for purpose. Simply put, there are too many fingers in the pie.

"The whole picture is confused. There are so many different agendas. It needs to be sorted out with a unified vision. It may be iconic – but it is still a missed opportunity."

4.37 The division of responsibility for buildings, external environment, and the water space constrains a clear coherent approach to the complex. This is compounded by the fact that the long-term interests of the different groups – cultural organisations, residents, office occupiers, retailers and leisure groups are not necessarily the same. For example, the residents do not necessarily want big events and large crowds. The cultural organisations sometimes have concerns about the quality of the retail offer or public events put on in the Dock. The bars and restaurants might want cheap parking but that is one of Gower Street Estates' primary source of income. There is a risk that each sector promotes their own interest rather than the wider ones of the Dock itself. There needs to be a more robust governance model to resolve this. This is changing because of the purchase of the commercial part by Aberdeen Asset Management. But it needs further clarity. Some have argued that they are still not clear about Aberdeen's long term strategy and would like better communication about their investment plans.

4.38 The Canal and River Trust (CRT) now has responsibility for the water space that had been held by British Waterways. There have been good major events like the 3 Queens and the River Festival. And many plans for future animation are being discussed. But people still expected to see more regular activity and animation by now.

"There are different land ownerships and building ownerships. Who owns which? Who owns the water? Who owns the physical land? There is no common identity. "

Not at the political top table

4.39 There are also concerns that Albert Dock is too detached from the political and policy debate about the future of the city centre and is not a player at the right tables. This reflects older difficult relations between the public and private sectors in Liverpool, which are passing but still remain. In part it reflects the isolation of Albert Dock from the city centre when the Dock was flourishing at a time the city was not, and they moved in separate worlds. But Albert Dock leaders need to become a weightier player in the debate about the future of Liverpool city region. It needs to win more friends and influence more people in the right places.

No governance of the Liverpool waterfront

"There is no strategic ownership of the waterfront. The city does not own it. Everything is initiative driven. There is no overarching position. There is no big picture for the wider complex."

"We need much more coherent planning to ensure consistency and compatibility of quality of events and activities. Some city council events cut the Dock off from the city centre. Some Pier Head activities are not the right quality. We need greater collaboration and greater forward planning."

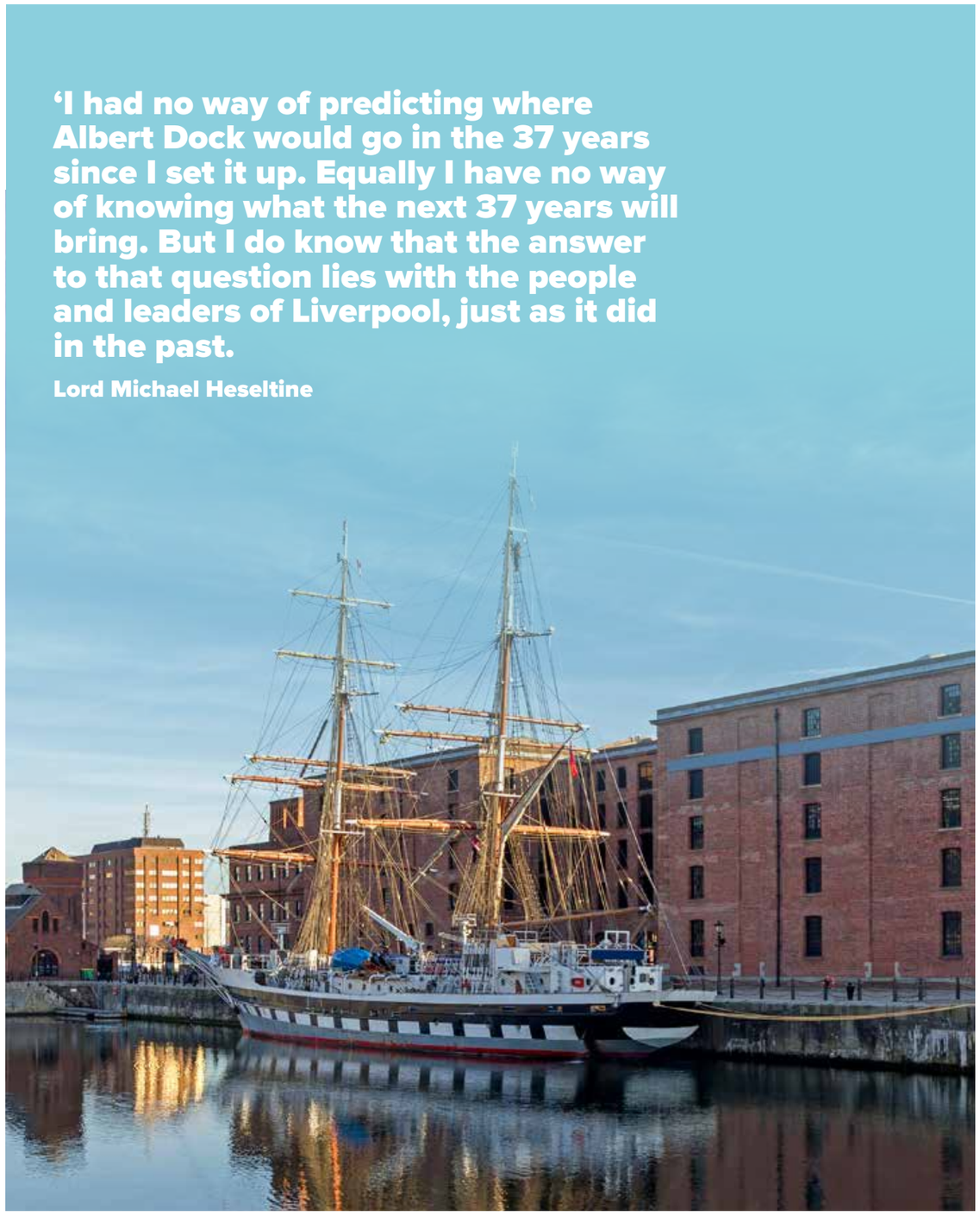
4.40 The challenges of Albert Dock's internal governance are reflected in the wider governance arrangements for the whole waterfront area in which Albert Dock sits. Again there is not a single body which has the powers, resources, capacity and legitimacy to drive development in a sufficiently coherent way. There is an institutional vacuum surrounding the waterfront which means that the Dock's inability to get a clear strategic direction matches the city's inability to get a single agreed strategy for the waterfront which is agreed by all the key partners. Nobody owns the waterfront.

4.41 This vacuum is the crucial challenge that all the stakeholders concerned about developing the waterfront need to address. And thus the issue goes far beyond Albert Dock itself.

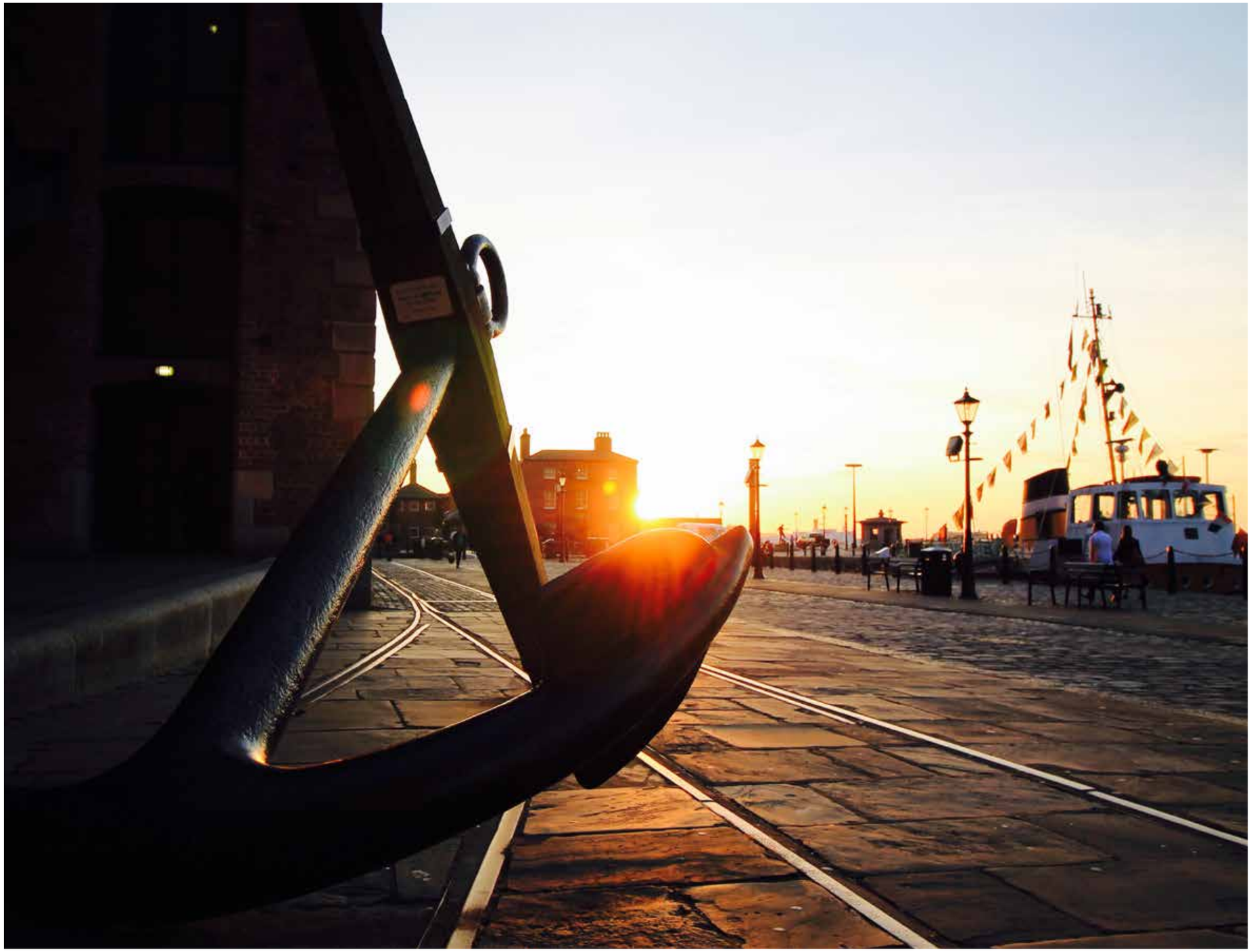
"We are too compartmentalised. We need the key people working together. We could be open about our own organisations. We could help each other politically by being supportive. There would be huge synergies."

'I had no way of predicting where Albert Dock would go in the 37 years since I set it up. Equally I have no way of knowing what the next 37 years will bring. But I do know that the answer to that question lies with the people and leaders of Liverpool, just as it did in the past.

Lord Michael Heseltine



CHAPTER 5.
HOW DO WE BUILD ON ALBERT'S SUCCESS ACROSS THE WIDER LIVERPOOL WATERFRONT AND CITY REGION?



"We have done well. But we could do much more with this. We have the infrastructure, the skyline, the waterfront. We can't let it fail."

5.1 This report has raised a series of questions and challenges for those involved in leading and developing Albert Dock. But it has also demonstrated there is a huge amount to build upon. First, everyone recognises that Albert Dock has contributed incredibly to the continuing renaissance of Liverpool, especially its physical development but also as a critical part of its visitor economy which is a key driver of the city region. It is the jewel in the crown of the waterfront and the city centre and it must be supported to flourish and perform even better in future. Second, everybody agrees the timing is right to rethink the role and contribution of Albert Dock to Liverpool waterfront, city centre and city region. There is a need to widen the governance agenda beyond the specific patch of Albert Dock. Third, there is a genuine willingness by different partners and organisations to work together to develop that role.

Raise quality

5.2 The report has shown that quality of the retail and leisure offer is no longer right for Liverpool given its recent renaissance. Albert Dock has fallen behind its neighbours. The quality needs to be improved and made more consistent. This is obviously the responsibility of the owners for that part of the estate, Aberdeen Asset Management. There is considerable evidence that Aberdeen has recognised this challenge and has a development programme and the necessary resources to achieve this. It will partly require a different management approach to existing leases. It will also require a more flexible use of the buildings. But it primarily requires a clear commitment to ambition and quality in terms of the anchor tenants and activities on the Dock in future. All partners welcome Aberdeen's commitment to improved quality. It will help the Dock, it will help other parts of the city centre, and it will grow and diversify its current visitor base. It could increase the level of support it gets from Liverpool residents. The coming months will demonstrate if that ambition can be successfully delivered.

"This is a huge city regional asset not just one for Liverpool. We need to make it more international, more world class."

Increase clarity about markets, customer and products

5.3 The leaders of Albert Dock need to be clear about which products and markets they are seeking to develop and how the interests of the partners on the Dock complex can be best reconciled. More widely everybody needs to be clearer about what markets the different parts of the city centre and waterfront serve. There must be a more coherent approach to all the groups who use the Dock and the waterfront area for different purposes – shopping, culture, and leisure. There needs to be greater cross over between the different products and markets

and the organisations need to plan for this. This should be part of a more coherent strategy for the overall waterfront economy of Liverpool.

Better internal governance of the Dock

5.4 The Gower Street Estates Board needs to make more strategic decisions about the future ambitions of the Dock. It needs to have more senior figures on it who can commit their organisation. The current membership does not have all the skills and experience needed to ensure the Dock punches its weight on the wider city scene. Also it needs to have some non-executive directors drawn from outside its constituent organisations who can take a larger, independent view of the longer-term needs and ambitions of the Dock. And it needs to be better integrated into the wider policy and political debate in the city and city region.

Better governance of the Dock and waterfront

"We need a change in final responsibility. We are simply moving the deckchairs around. We have multiple operations. We need the leadership, vision and resources to do the waterfront properly. Responsibility is completely split. The Mayor and the Chief Executive need to take a lead on this. And it must be much further up the city regional agenda in future."

5.5 The waterfront itself needs to be more coherently led and managed. No existing organisation has the necessary capacity to get things done and delivered. At present the only organisation which takes a wider view of the area is the Waterfront Business Partnership, set up by the CEO of Gower Street Estates in 2012. But essentially it is a Community Interest Company.
The waterfront needs a more powerful organisation which can align and integrate the ambitions, programmes and actions of all the different players who now operate on the waterfront. This would include Peel in the north docks, through to the Pier Head, across into Albert Dock and beyond into the Convention and Conference Centre and across the Strand into the Liverpool One area.

"Who drives the decisions about Liverpool waterfront? How do individual events connect to each other? The first conversation should be what we want for the waterfront. There should be a plan."

Increased capacity and resources

5.6 There is genuine dilemma in that many of the organisations functioning in the waterfront area, especially the public sector ones, have limited resources and capacity to undertake an ambitious business and management strategy. The city council has lost huge amounts of income and many officers. Equally the Museums have had substantial budget cuts. The Waterfront Partnership has limited resources and capacity. Gower Street Estates has access to resources but has limited capacity to deliver schemes. The operational arm of Aberdeen Asset Management in Liverpool is relatively small and Albert Dock is only part of a very large national property portfolio that its Liverpool director has to deal with. The CRT could not manage the complex on its own. A significant effort must be made to generate capacity from within existing organisations to be able to do justice to the scale of the challenge involved.

Get a hymn sheet

"There needs to be a Masterplan for developing the waterfront area, which among other things has the greatest collection of national museums in the UK. There is already a waterscape strategy for the sustainable development of the docks, but initiatives need to be aligned. There is huge potential for tourism in this area."

"We need greater clarity, connectivity and leadership. We need an integrated business plan for the Dock and the wider waterfront."

5.7 Albert Dock is a market led initiative. It will not therefore be keen on heavy handed planning arrangements. But there does need to be a plan of some kind identifying strategic ambitions, key priorities, actions and investments.

'Only connect' – to businesses, visitors, residents, the waterfront, city centre and city region

5.8 During the past decade, Liverpool has become a good news story – one of increasing ambition and achievement. Albert Dock has played an important part in that story. But one of the greatest risks to cities is not failure but rather complacency about success. To make it punch its weight and contribute to a truly world class city, those organisations and leaders whose work affects Albert Dock and wider waterfront and city centre need to continue to focus on the future success of the Dock rather than upon its recent achievements. The Jewel in the Crown needs another polish!

5.9 At the end of this report we repeat the message we outlined at the beginning for those involved in shaping the Liverpool waterfront. There is now a major opportunity and need for leaders to build upon, deepen and widen the success of Albert Dock and make a continuing contribution not only to the Liverpool waterfront and city centre but to the city region. Albert Dock is not a merely local amenity but a fantastic international asset. Plans for its future development should reflect its international status and globally significant past. Jesse Hartley did not make little plans in 1846. The current custodians of his achievement must be equally ambitious. And they have a real opportunity to be so.

On the Waterfront. Who must do what next to build on Albert's success?

5.10 Albert Dock has been a success during the past decade – as has Liverpool's waterfront. But there remains much to do to capitalise upon their potential. And the next decade will be economically challenging with growing competition in an uncertain global marketplace. If action is not taken now, the investment that has been made so far could be at risk. The key players must act to protect their investments and ensure the next decade is a successful one. The vacuum in institutional governance must be addressed. At the moment there is inadequate capacity, resources and authority to make the waterfront the success it should be, given its international status and significance. It is true that many of the partners involved face big financial pressures. Nevertheless they have to come together and generate the human and financial resources needed to protect and promote their assets.

5.11 The city council is probably the most financially squeezed organisation. Nevertheless it could play a key agenda setting role. In particular the Mayor should exercise his convening influence and encourage the partners to address their strategic challenges, as he has done in several other important areas of the city's life. But the city council cannot do it on its own. And nor should it. The common challenges must be addressed by the owners of the interests on the waterfront. Essentially this means that Peel, Aberdeen Asset Management, Gower Street Estates, the Canal & River Trust, the Arena and Convention Centre, National Museums Liverpool, Liverpool City Council as owners of the Cunard Building as well as the owners of the Liver and Port of Liverpool Buildings at Pier Head, must come together to find a solution to the challenges. In particular it is now the right time for Aberdeen Asset Management as the owner of the majority of the commercial elements in Albert Dock to make a more expansive and visible contribution to the debate about the future of the waterfront. In due course the partners could develop a closer working relationship with the owners of Liverpool One. But initially it should involve the organisations on the river side of the Strand.

5.12 The asset owners need to decide how they see the waterfront developing during the next decade and how they will guarantee it is delivered. Their challenges are the need to create greater quality, connectivity and clarity about markets. But a key challenge is how to generate capacity and ensure delivery. The owners must create specific arrangements which will deliver what they want. This is what many European cities have done when redeveloping their ports and harbours. It was also what was done thirty years ago when the Merseyside Development Corporation was created. And it delivered.

5.13 There are at least two existing models available of regeneration in the city centre. Liverpool One is a successful organisation which has a very large team and a high profile Director. But it is a significantly larger commercial operation and is extremely well resourced. The other example which has attracted a lot of attention and some recent success is the Knowledge Quarter, which is a Mayoral Development Zone. This is probably a more relevant model. A small number of asset owners including the two universities, the Liverpool School of Tropical Medicine, cultural organisations and the city council have formed a Board which has developed a clear strategy and each has contributed annually £50k to support a team to deliver it. Before that team and Director were appointed the Knowledge Quarter made little progress. But since their appointment, significant national and international attention – and more importantly investment – has been attracted. The waterfront would benefit from a similar approach, even if the precise details would be different. The details would need to be decided directly by the owners of the assets involved.

Doing well by doing good

5.14 The waterfront partners should now agree to come together to decide what arrangements they wish to create to deliver their strategic ambitions. The Mayor should invite them to conduct a short sharp review of the strategy, capacity, resources that are needed with a public announcement of their results within three months. The case for this approach is essentially a commercial one about investment. The owners could make much of their assets and their current investment if they collaborated directly and put their hands in their collective pockets to ensure they had the capacity to deliver an even more successful waterfront in future. If they don't, there is a significant risk that the waterfront will underperform and the value of their assets could decline. But more positively, there is huge unrealised potential for all partners on the waterfront. If they came together they could do well by doing good. They could increase the value of their individual asset. And in doing so they could increase even more the contribution of the waterfront and Albert Dock to the continuing renaissance of Liverpool and its city region. Who would not want that?

APPENDIX

Interviewees

We are grateful for the views offered by the following individuals of the role, performance and prospects of Albert Dock and the wider Liverpool waterfront and city region.

James Birchell, Atlantic Pavilion, Gower Street Estates Board

Chris Bliss, Director, Liverpool One

Chris Brown, Director, Marketing Liverpool

Janet Dugdale, Director of Museum of Liverpool and Merseyside Maritime Museum

Ged Fitzgerald, Chief Executive, Liverpool City Council

John Flamson, ex-Chief Planner, MDC, Heseltine Institute Fellow, University of Liverpool

David Fleming, Director, National Museums Liverpool

Catherine Garnell, Assistant Chief Executive, Liverpool City Council

Sue Grindrod, Chief Executive, Gower Street Estates

Laura Hampson, Hampson Hughes Solicitors, Gower Street Estates Board

Lord Michael Heseltine

Robert Hough, Chair, Liverpool LEP and Peel Holdings

Sarah Jackson, University of Liverpool

Claire McColgan, Director, Culture Liverpool

Rachel Mulhearn, Consultant

Ian Murphy, Deputy Head of Merseyside Maritime Museum, Gower Street Estates Board

Andrea Nixon, Director, Tate Liverpool, Gower Street Estates Board

Andrew Nolan, Senior Surveyor, JLL

Steve Parry, Managing Director, Ion Property Developments

Bob Pointing, Chair of North West Partnership, Canal & River Trust

Bob Prattey, Chief Executive, The ACC Liverpool Group

Dave Roscoe, Chair, Gower Street Estates Board

Max Steinberg, Chief Executive, Liverpool Vision

Richard Wilson, Asset Manager, Aberdeen Asset Management, Gower Street Estates Board

Ian Wray, ex-Chief Planner, NWDA, Heseltine Institute Fellow, University of Liverpool

Copies of the report can be accessed at:

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