

ENSURE – European Sustainable Urbanisation through port city Regeneration

Targeted Analysis

**Annex 4.4 Case Study Report:
Cork City (IE)**

Case-Study Report

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Authors

Niamh Moore-Cherry, Aoife Delaney, Eoin O'Mahony (UCD) and Cian O'Callaghan (TCD)

Advisory Group

Project Support Team: Lorcan Griffin, Cork City Council; Hugh Killen, Cork City Council

ESPON EGTC

Michaela Gensheimer (Senior Project Expert), Caroline Clause (Senior Financial Expert), Nikos Lampropoulos (Project Expert – European Outreach/Press and Media)

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Annex 4.4 – Case Study Report – Cork City (IE)

ENSURE – European Sustainable Urbanisation through port city Regeneration

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The final version of the report will be published as soon as approved.

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Abbreviations

CASP	Cork Area Strategic Plan
CMASP	Cork Metropolitan Area Strategic Plan
CMATS	Cork Metropolitan Area Transport Strategy
EC	European Commission
ESPON	European Territorial Observatory Network
ESPON EGTC	ESPON European Grouping of Territorial Cooperation
EU	European Union
IDA	Industrial Development Authority
LDA	Land Development Agency
LECP	Local Economic Community Plan
LUTS	Land Use and Transportation Study
LVC	Land Value Capture
MASP	Metropolitan Area Spatial Plan
NAMA	National Asset Management Agency
NTA	National Transport Authority
NUTS	Nomenclature of Territorial Units for Statistics
RSES	Regional Spatial and Economic Strategies
SRA	Southern Regional Assembly
TII	Transport Infrastructure Ireland
TOD	Transport Oriented Development
UCC	University College Cork

1 Introduction

This case study report for the port city of Cork (Ireland) has been prepared as a key input to the ESPON project ENSURE – European Sustainable Urbanisation through port city Regeneration. The overall ENSURE project consists of three tasks:

- A task 1, based on a desk-based survey and descriptive analysis of small and medium-sized port cities in Europe to identify the trends, outcomes, impacts, risks and challenges of port city regeneration.
- A task 2, based on a case study comprising four European small and medium-sized port cities of Cork (IE), Aalborg (DK), Brest (FR) and Catania (IT) with the aim of collection and analysing the experience of the port regenerations in their territories
- A task 3 based on the outcome of task 1 and 2 to develop a framework of good practice for implementing sustainable port city regeneration in small and medium-sized European port cities

This case study is thus one of four case study reports of task 2. The purpose is to describe and analyse the process of relocation of port activities and the regeneration of the port areas in the city of Cork (IE) (Medium size port city) and to identify main drivers and challenges of this process on the background of the specific geographical, urban, social and economic context in order to contribute to an overall assessment of what best practise is for cities like Cork (IE). The story of the regeneration of Cork Docklands is tripartite. Three distinct land parcels are evident (1. North Docklands and 2. South Docklands (collectively are referred to as City Docklands), and 3. Tivoli Docklands, each with a different associated narrative and timeline.

The development of the North Docks is substantially underway, with a number of major sites currently under construction via private sector developers and partnerships with semi-state agencies. In recent years, the transition zone of the city and South Docks has been substantially built out, while a number of large-scale land sales have paved the way for the regeneration of the South Docks itself. Nevertheless, a number of infrastructural challenges remain before the full potential of the South Docks can be realised. The recent regeneration of North and South Docks is heavily influenced by changing post-economic-crisis national policy measures (e.g. Fast-track planning - Strategic Housing Development and more flexible national planning guidelines for Design Standards for New Apartments) and will be further enhanced by recent changes to urban development vehicles and funding (e.g. Land Development Agency, Ireland Strategic Investment Fund, Urban Regeneration Development Fund).

Tivoli Docks is still an operational port area, although a range of urban design briefs and land-use plans are currently being prepared to examine the feasibility of regeneration as primarily a location for housing, leisure and recreation. In the last few years, Cork has made a strong resurgence following the property crash and financial crisis. A combination of new policy

measures, investment opportunities and development proposals see the city once again experiencing major change through the regeneration of its waterfront.

In connection with the overall project, a research framework has been developed to indicate the main questions to be raised during the project activities. The main questions of the research framework are shown in the following Table 1.1.

Table 1.1: Research Framework

Questions
Impact
What are the impacts of port services relocation on medium size port cities?
What are the impacts of brownfield regeneration on medium size port cities?
What are the main challenges of medium port city regeneration?
Policy and governance
How can policy, support medium port city regeneration and mitigate challenges?
How can regulation support medium port city regeneration and mitigate challenges?
How can governance support medium port city regeneration and mitigate challenges?
What are the risks of port city regeneration?
Finance
What funding models support port city regeneration? What works, and why?
What is the role of public finance in port city regeneration? How is value for money achieved?
Implementation
How can city visions for city dockland district regeneration be implemented? What works, and why?
Citizens Involvement
How can citizens be involved in the regeneration process? What works, and why?
Catalysts
What type of catalyst developments are employed to transform and provide a focus for citizens and economic activity? What works, and why?
What other important synergies should be considered?
Knowledge Transfer and Lessons Learned
What solutions exist to inspire/implement port city regeneration?

Source: Authors, ESPON ENSURE (2020)

On the basis of the four case studies, a synopsis was prepared as Annex 3 with the aim of providing an overview of similarities and differences in the experiences of the four case cities and hence to get a basis from which to develop inputs from the case studies to a framework of good practise.

A desk-based analysis of key policies affecting Cork City and Tivoli Docklands has been undertaken and complemented by interviewing. During March and early April 2019, sixteen in-depth qualitative interviews were undertaken with key stakeholders in Cork. A semi-structured approach was taken to ensure that the key priorities of the research framework were addressed

during questioning but also to enable enough flexibility for interviewees to raise issues of concern to them that had not been considered in drafting the interview schedule. A categorisation of stakeholders interviewed is below:

- Local authority planners and project leads from various departments (5)
- Private sector developers (2)
- Cork Chamber of Commerce
- Port of Cork
- Cork Business Association
- Planning consultant
- Commercial interest
- Irish Rail
- Land Development Agency (newly established state agency)
- Irish Water
- Office of Public Works

All interviews have been transcribed and a thematic analysis has been undertaken aligned to the research framework.

2 Historic context

2.1 Scope of the case study

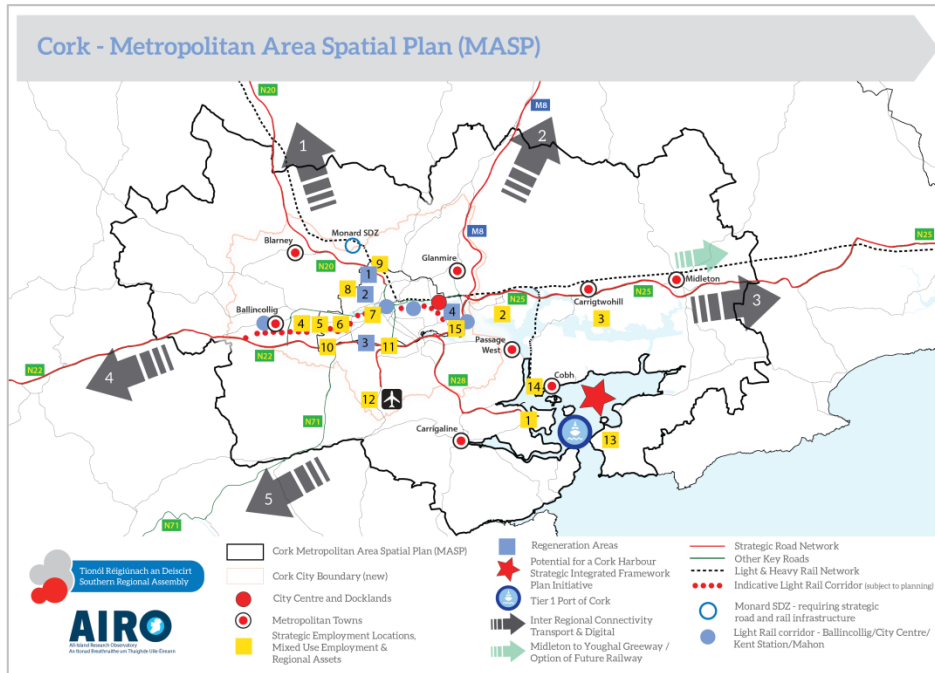
Cork City is located on the south coast of Ireland within the Southern Regional Assembly area. It is the primary second-tier city in Ireland and the primary regional economic driver in the southern region (Map 2.1). The city of Cork is built on a tidal estuary and since medieval times has operated as the principal port in the south of Ireland. On May 31st, 2019, Cork City's new boundary increased the city population to 210,000 persons, re-designating it as a medium-sized port city and enabling Cork City Council to take the lead in driving the growth of the city and metropolitan region (Map 2.2). Today Cork is one of three Tier 1 ports in the Republic of Ireland, maintaining a presence close to the city centre along the River Lee but with large deep-water facilities operating and currently being redeveloped and expanded at Ringaskiddy (approx. 14km downstream).

Map 2.1 Location of Cork City in relation to other Irish urban areas



Source: OpenStreet Map

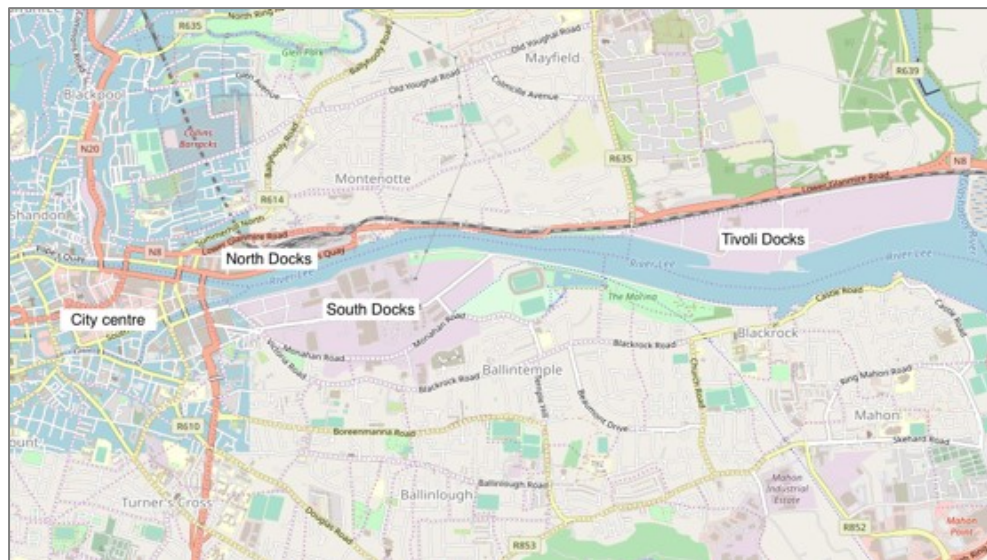
Map 2.2 Map of Cork showing boundary extension of the city and wider metropolitan area



Source: Cork City Council

Cork Docklands comprises 162 ha of land adjoining the eastern part of the city centre. The area is divided into the North Docks and South Docks. In this research, we also look at Tivoli Docks, a Port facility slightly further outside the city that has been targeted for future regeneration (Map 2.3). The Port of Cork currently retains ownership of some of the city quays and Tivoli docks but has begun the phased process of relocating its activities and functions to Ringaskiddy.

Map 2.3 Map of Cork showing North Docks, South Docks and Tivoli Docks



Source: OpenStreet Map

The physical landscape has played an important role in the development of the city and the docklands/port region. Cork City is located within the River Lee Valley. The city's location within the steep valley and drainage zone means that steep sites on the one hand, and flooding on the other, are a key consideration for development particularly within the city centre and docklands.

2.2 The history of Planning in Cork

Based on trading and mercantilism – particularly across the Atlantic, the city grew successfully as a port city from the medieval era. In the 19th century, textiles, brewing and distilling all became major industries, the butter trade flourished, and Cork harbour grew in importance as a trading point for trans-Atlantic trade. A mid 19th century map of Cork (Map 2.4) illustrates that the current day North and South Docks were relatively undeveloped and trading activity was taking place from the city centre waterfront areas.

Map 2.4 Historic Map of Cork



Source: Ordnance Survey Ireland, historic 6" map, 1837-1842

During the early to mid-20th century, the port heavily industrialised with chemical, steel and pharmaceutical sectors particularly in the lower harbour away from the city centre lands. The Cork Harbour Commissioners published the Cork Harbour Plan in 1972 to plan future development in a coordinated manner. However, due to lack of funding, its potential was never realised. In the early 1980s, the city was adversely impacted by de-industrialisation with the closure of factories, such as Ford in the south docks.

New businesses parks supported by the Industrial Development Authority (IDA Ireland) and the private sector developed in the suburbs of Cork City due to advantages such as space, accessibility and purpose-built buildings. The city docklands became more obsolete after the ferry terminal was relocated to Tivoli and then subsequently to Ringaskiddy. However, in recent decades, Cork City has regained its diverse economy as a hub for the Irish pharmaceutical sector as well as being a hub for the Life Sciences sector, global business and financial services

such as Amazon and BNY. Cork Lower Harbour is now home to seven of the world's top ten pharmaceutical companies - Johnson & Johnson, Pfizer, Novartis, MSD, AbbVie, GlaxoSmithKline, Eli Lilly and Styker (Burke, 2017). Over fifty technology companies including Apple and Malwarebytes, are present in Cork City including some European and EMEA Headquarter functions (Cork City LECP, 2016).

2.2.1 National Scale context

In 2002, the Irish government launched the National Spatial Strategy (NSS), the first formal attempt at spatial planning in Ireland. Nine gateway cities and towns, including Cork, were identified to act as key drivers of regional growth and a series of connected 'hubs' would connect to rural areas and 'other towns'. While it remained the broad framework for planning in Ireland until its formal dissolution in early 2018, it was essentially abandoned when a scoping group for a successor plan was established in August 2013 and the eight regional authorities that had responsibility for translating the strategy were dissolved in June 2014. Three new regional assemblies were inaugurated in 2016 and in February 2018, a new National Planning Framework was launched.

2.2.2 Regional Scale context

Ireland has historically had very weak regional governance structures, but it is now divided into three regions for the purposes of planning and governance. Cork sits within the Southern Region along with the cities of Limerick and Waterford (Map 2.5). Although new NUTS2 (Nomenclature of Territorial Units for Statistics) regional structures were only approved by the European Commission in 2016, eight regional authorities previously operated at the sub-national level. These had very limited powers but were responsible for the production of regional planning guidelines to coordinate activity across local authority boundaries.

Cork has been unique in an Irish context in that voluntary metropolitan or city-regional scale planning has been on the agenda for four decades through the Cork Land Use and Transportation Strategy (1978) and its successor the Cork Area Strategic Plan 2001 (CASP).

Map 2.5 Southern Region in context of the island of Ireland



Source: AIRO

2.2.3 Local Scale context

While the Cork LUTS 1978 supported an integrated approach to land use and transportation planning, the Cork Area Strategic Plan (CASP) was the first significant impetus of metropolitan scale planning in Ireland. The strategies in CASP 2001 – 2020, were formally adopted by both Cork City and County Councils and embedded in their Development Plans in 2003 and 2004. This voluntary cooperative governance arrangement was widely lauded. However, progress was slower than initially expected (Indecon et al., 2008). A particular challenge was achieving a balance between broader territorial development and the health of the core city as the engine for city-regional growth. The update notes the influence of actors and policies beyond the

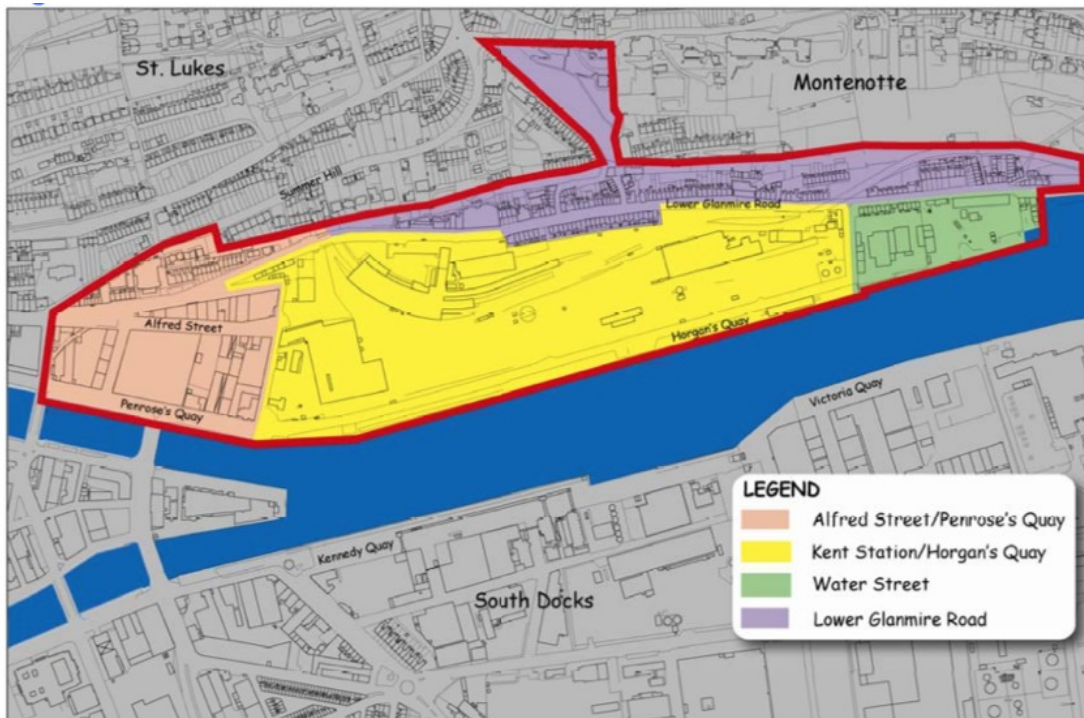
region, particularly central government departments, state agencies such as the Industrial Development Authority, the National Spatial Strategy, and Regional Planning Guidelines in shaping the viability of the CASP. This was related to the high levels of centralisation in the Irish state and the lack of local-level control over and influence on infrastructural funding and overarching policy frameworks, objectives and decision-making. Within this plan, Cork Docklands was identified as one of the key areas for development within the metropolitan area.

The Cork Docklands Development Strategy was commissioned and produced by internationally based urban design consultants, Urban Initiatives, in 2002. It set out a broad framework covering the north and south docks. The Strategy outlined proposals for land-use patterns, public transport provision, desired mix of uses, and key design features. In addition, it presented an analysis of key barriers, including SEVESO sites, the need for new bridges and new transport links. Furthermore, the Strategy built upon the vision in CASP to create a new urban identity for a post-industrial Cork by developing a metropolitan region and knowledge economy. This approach was further consolidated through branding exercises surrounding the preparations for Cork's year as European Capital of Culture in 2005 (O'Callaghan and Linehan, 2007).

After the publication of the Docklands Development Strategy in 2002, Cork City Council established a docklands directorate to drive the vision to realisation. Local Area Plans for the North Docks and South Docks were published and they identified significant barriers to redevelopment, including the problem of accessibility in the south docklands.

The North Docks Local Area Plan (NDLAP) covered approximately 17 hectares and was produced by the Planning Directorate of Cork City Council. Focusing on a small number of sites centred on public lands adjacent to the main train station, the NDLAP prescribed mixed-use development, public realm features and height guidelines. Four key sites were described with different visions. Penrose Quay/Alfred Street were proposed to be mixed use development which would link the city centre to Kent Station and create a prime retail area. Kent train Station / Horgan's Quay were to be a mixed-use space consisting of a new train station with shopping, hotels, the convention centre, cinema, offices, cultural uses and residential development and water side activities. Water Street was proposed as the site for high density residential development and offices, a new gateway docklands project, and the potential re-use of historic port structures was considered important. Finally, Lower Glanmire Road was to be consolidated as an inner-city residential area with excellent services (See Map 2.6).

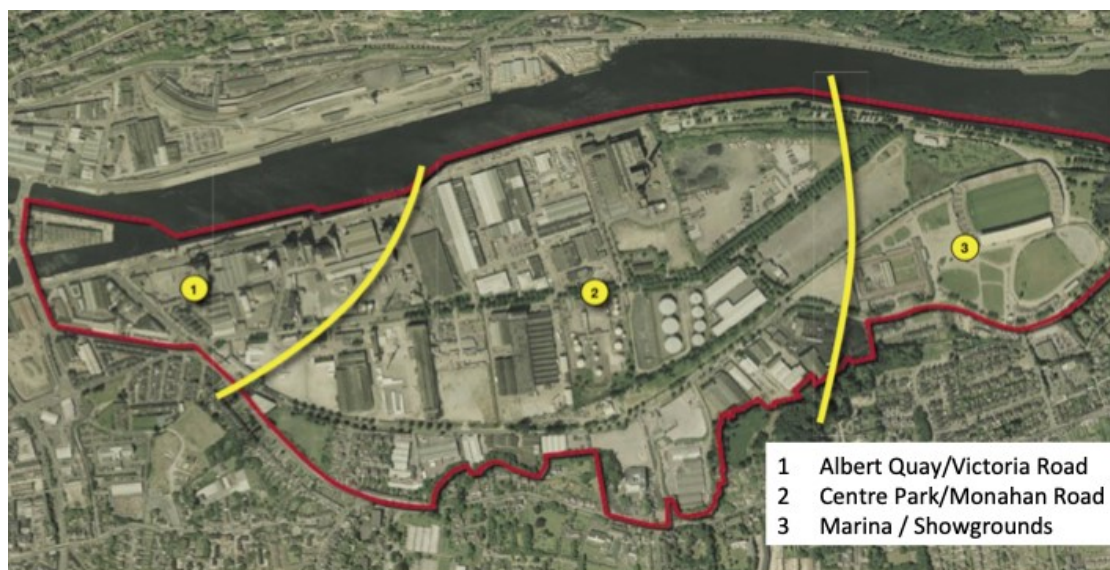
Map 2.6 North Docks location map



Source: North Docks Local Area Plan, 2005

The South Docks Local Area Plan (SDLAP) was produced by the Docklands Directorate with private consultants. It proposed mixed-use regeneration but was cognisant that a large number of businesses already operated in the area. The focus of the plan was on attracting private sector investment to deliver an ambitious vision over 20 years (Map 2.7). The production of the Plan coincided with the onset of the financial and property crisis, and thus progress was impeded.

Map 2.7 South Docks location map



Source: South Docks LAP, 2008

2.2.4 Planning Cork docklands – context

Although significant preparation and planning had been put in place, time and timing worked against further realisation of the local area plans and indeed the wider plans for docklands. The economic crisis of 2008/09 and the collapse of the banking system in Ireland meant that development stalled. Despite the alignment of policymakers and the private sector behind the first phase of Cork docklands regeneration, the economic crash changed the funding context both in terms of the collapse of bank lending and the cancelling of government capital expenditure. For example, the Gateway Initiative Fund – intended as a means to fund strategic infrastructure projects including bridges in Cork docklands – was cancelled as one of the first austerity measures following the crash.

Since the upturn in 2013, private developers have been encouraged back into the docklands and a significant number of land transactions have taken place. This has encouraged substantial redevelopment in the North Docks, new developments in the transition zone between the city centre and South Docks and created a positive climate for further change. A particular support for future regeneration will be the recently formed Land Development Agency, whose key role is to realise the potential of state lands and encourage cooperative working across state bodies.

2.3 Demography and socio-economic context

At the last Census of Population (2016), Cork city and suburbs had a population of 208,669. Cork is the fastest growing city outside of Dublin. As a counterpoint to the dominance of Dublin, the Regional Spatial and Economic Strategy for the southern region, has set an ambitious population target of 283,669 for Cork City and Suburbs by 2031, representing an additional 75,000 people.

Cork docklands is a part of Cork city, which itself is nested within different administrative scales as follows.

Table 2.1: Administrative scales of relevance to planning in Cork

Administrative area	Sub-administrative parts	Definitions
Ireland (NUTS1)	NUTS 2 regions: Eastern and Midland region North Western region Southern region	Responsible for and oversight of all levels of spatial planning and economic development.
Southern Region (NUTS2)	South-East Region: Carlow, Tipperary, Waterford, Wexford, Kilkenny counties South-West Region: Cork, Kerry counties Mid-West Region: Clare, Limerick, Tipperary counties	Production of regional spatial and economic strategies including Metropolitan area strategic plans (MASPs) and Metropolitan Area Transport Strategy. The Southern Region boundary can be seen in Map 2.5.
Cork Metropolitan Area	Defined by central government and including Cork City Centre, Cork City Docklands and Tivoli and City Suburbs at its core; metropolitan towns;	A complementary location to Dublin and a primary driver of economic and population

Administrative area	Sub-administrative parts	Definitions
	Cork Harbour; Port of Cork; Cork Airport; and parts of Cork County	growth in the Southern region with a focus on increased regional connectivity and sustainable transport.
Cork City Council	The docklands – north, south (north and south form City docks) and Tivoli – are sub-areas within the city	Administers local government in Cork City including both City and Tivoli Docklands and has been subject to a recent boundary extension (2019).
Cork County Council	Cork metropolitan area is a sub-area.	Administers local government in Cork County including the new port site in Rinkaskiddy but excluding Cork City which is a unitary authority

Source: Authors, ESPON ENSURE (2020)

The population of Cork city since the boundary extension is now 210,000 and the city extends to 187 sq.km. The top five employment sectors in Cork are human health and social work, retail, public administration, education and professional, scientific and technical activities (Table 2.2). Since the boundary extension earlier this year, the number of jobs now located within Cork city and suburbs is 102,139 (RSES). With the exception of Dublin and Limerick, Cork is the only county in Ireland where per capita income is higher than the state average. The most recent income data (from 2016) indicates that Dublin City had the highest earned income per person working for payment or profit in Ireland at €39,999, followed by Dún Laoghaire-Rathdown (€37,117) which is within Greater Dublin, and Cork was ranked third at €34,317. This reflects the city's core asset of highly skilled graduates and the presence of important national and international firms in the city.

Table 2.2: Profile of employment in Cork

Economic Sector	Total Employment	% of Total
Human Health and Social Work Activities	13243	17%
Retail	10107	13%
Administrative and Support Service Activities	8226	11%
Education	7197	9%
Professional, Scientific and Educational Activities	6849	9%
Accommodation and Food Service	6351	8%
Public Administration and Defence	559335	7%
Manufacturing	4556	6%
Information and Communication	4194	5%
Other Service Activities	3135	4%
Financial, Insurance and Real Estate Activities	2661	3%
Wholesale	1801	2%
Transportation and Storage	1642	2%
Arts, Entertainment and Recreation	1093	1%
Utilities	1067	1%
Construction	578	1%

Economic Sector	Total Employment	% of Total
Agriculture, Forestry, Fishing, Mining & Quarrying	9	<1%
Total	782044	100%

Source : Cork City Council (2017) <http://sp1ra1.corkcity.ie/media/ELU%202016%20Report.pdf>

3 Laws, plans, and policies

The planning system in Ireland is hierarchical in nature and since the publication of the new National Planning Framework (NPF) in 2018 it has been fundamentally altered. The NPF sets the overall vision and ambition for planning over a 20+ year time period, and this is given effect through the Regional Spatial and Economic Strategies (RSES's) including Metropolitan Area Spatial Plans (MASP's) produced by the regional assemblies. At the next level, city and country development plans must be in alignment with the objectives of the RSES. Local Area Plans are produced by city and county councils as a more fine-grained approach to strategic local development.

Table 3.1 provides an overview of the different laws, plans and policies of relevance to the Cork docklands divided into four periods of planning/policy making. The policies most relevant to the Cork Docklands are highlighted in red text.

Table 3.1: Overview of policies, plans and regulations relevant to Cork docklands

Type of Planning	First (1963-1977)	Second (1978-1998)	Third (1999-2015) ¹	Fourth (2015+)
“National Context”	Buchanan Report (1968) IDA Regional Plans (1972)	National Development Plans (1989-1993, 1994-1999)	National Spatial Strategy (2001-2020) Planning and Development Acts and the Planning and Development Regulations 2001 (S.I. No. 600 of 2001)	Project Ireland 2040: National Planning Framework and National Development Plan
Strategic land use”		Cork Land Use Transportation Study (LUTS;1978) and LUTS Review (1992)	Cork Area Strategic Plan (CASP; 2001-2020) CASP Update 2008	Regional Spatial and Economic Strategy (RSES) (2019-2031)
“Transport”	BKS (consultants) Traffic Plan (1968)			Cork 2050: Realising its full potential
“Infrastructure”	City Main Drainage Scheme (1965), City & Harbour Water Scheme (1970)			Cork Metropolitan Area Strategic Plan (CMASP)
				Cork Metropolitan Area Transport Strategy (CMATS) Feb 2020

¹ with exceptions for plans and policies published prior to 2015 dated to end after

Type of Planning	First (1963-1977)	Second (1978-1998)	Third (1999-2015) ¹	Fourth (2015+)
“Local Economy/Cork Harbour”	Cork Harbour Development Plan (1972)			Living City Initiative areas 2020 (tax relief) Harbours Bill 2015
Cork City		City Development Plans (1979-1998), Historic Centre Action Plan (1994)	Cork City Development Plans (various years)	Cork City Development Plan 2015-2021 Cork City Centre Strategy (2014) Cork City Local Economic & Community Plan (2016)
Docklands			Docklands Development Strategy (2001-2025) North Docks Local Area Plan (2005) South Docks Local Area Plan (2008) Cork Docklands Development Forum (Wrixon Report, 2008) Docklands Public Realm Masterplan and design guidelines (2012) Marina Park Masterplan (2013)	City Docks Local Area Plan ‘Issues Paper’ 2017 Tivoli Docks Local Area Plan ‘Issues Paper’ 2017
Cork County (Satellite/ring towns)” and wider region	Satellite Towns Policy (County Development Plans, 1967-1996)		Special Local Plans (2004) for rail-based NE growth corridor Regional Planning	Regional Spatial and Economic Strategy (RSES) (2019-2031)

Type of Planning	First (1963-1977)	Second (1978-1998)	Third (1999-2015) ¹	Fourth (2015+)
			Guidelines 2002 and 2011 South-west Regional Planning Guidelines (2010-2022)	Cork County Development Plan (2014)

Source: Adapted from Crowley et al (2005)

3.1 National framework

In the last eighteen months, the national policy framework has been radically altered with the introduction of Project Ireland 2040 comprising the National Planning Framework (NPF) and the National Development Plan (NDP) 2018-2027.

The NPF focuses on the achievement of ten national strategic objectives and ten strategic investment priorities including housing and sustainable urban development; airports and ports; climate action; and water infrastructure. Importantly, this is the first time that planning and the national investment plan for strategic infrastructure (through the NDP) are being coordinated. The NPF targets 50% growth outside of the Dublin region, and the five regional cities will play a critical role in delivering this.

Cork will play a very important role in achieving this target and Cork docklands are seen as important development opportunity (mixed-use high density) spaces. The plan aims to ensure compact growth by targeting 50% of new development within the existing urban footprint. The NPF is being operationalized through new Regional Spatial and Economic Strategies (RSES's) incorporating Metropolitan Area Spatial Plans and Metropolitan Area Transport Strategies.

The National Development Plan (NDP) 2018-2027 includes the introduction of a new Urban Regeneration and Development Fund (URDF) worth €2 billion to support development in major urban centres, including Cork City. It identifies priority areas for public capital investment across all scales of government and illustrates a commitment to meeting Ireland's infrastructure and investment needs. For example, the NDP emphasises the role of the Port of Cork as a key site for international connectivity to increase the city's competitiveness. Further, there are ambitions within the plan to create large scale sustainable regeneration projects within the North and South Docklands and Tivoli Docklands. The redevelopment is for both brownfield and greenfield spaces, transport, housing, public realm and amenities, densification, diversification. There are also proposals for an east-west transport corridor from Mahon, through the City Centre to Ballincollig and a north-south corridor with a link to the Airport; M8/25/N40 and improved Ringaskiddy Port access. Additionally, there is a focus on enhancing water supply and wastewater services as well as ensuring reduction of energy demands and a low carbon society.

Supporting the goals of the NPF and broader Ireland 2040 project in terms of housing is the Strategic Housing Development (SHD) Planning Application process which was introduced as a temporary measure to help address housing shortages. It was enacted on 19th December 2016 and aims to speed up the planning application system and subsequently the delivery of housing. The types of housing applications that can be submitted include: a) developments of over 100 houses; b) 200+ bed spaces student accommodation; and c) development that includes both residential and student housing (An Bord Pleanála, 2017).

3.2 Regional planning context

RSES for the southern region gives detail to the principles of the NPF and coordinating territorially other policies such as Enterprise 2025, and the Local Enterprise and Community Plan process (LECP). As the RSES is contextualised by the National Planning Framework its long-term goal is 2040. However, there is a specific focus on what can be achieved in the short to medium term as it recognises that several iterations of the RSES will be needed to meet the overall goals.

Each region incorporates Metropolitan Area Spatial Plans (MASP) to guide the development of the metropolitan areas. Now that RSES and MASP for the southern region are adopted, a review of all planning policies at the urban and local level (e.g. Cork City Development Plan) is being undertaken to ensure alignment. The potential of Cork docklands features heavily in the Cork MASP.

The Cork Metropolitan Area Transport Study (CMATS) 2040 was adopted in February 2020 by the National Transport Authority (NTA) in collaboration with Transport Infrastructure Ireland (TII), Cork City Council and Cork County Council. A coordinated land use and transport strategy, it aims to put key transport infrastructure in place to support the development of the metropolitan area up to 2040.

The study outlines the potential for an estimated €3.5bn investment to include commuter rail, bus corridors, light rail, park and rides, walking and cycling infrastructure and improved road connections. It has 6 key vision areas;

- Provision of an efficient and safe transport network;
- Sustainable transport;
- Public transport;
- Protection of strategic routes;
- Enhancement of the public realm; and
- Increase access to public transport.

The goal of the plan is to create a functioning and sustainable integrated transport system but it acknowledges a number of challenges, including current land use and physical constraints;

travel behaviour and public transport provision. The strategy outlines key goals in the short term (2026), Medium term (2031) and long term (2040).

Together with the RSES and MASP, the CMATS provides the final enabling strategy to support the future growth of the Cork Metropolitan Area.

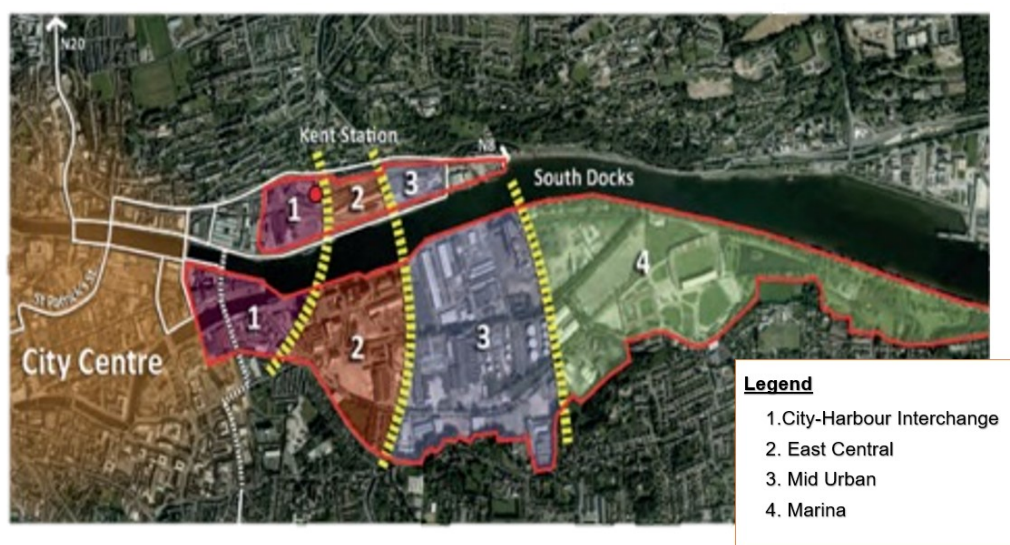
3.3 Local Plans: Cork City and the Docklands

A range of policy documents and statements have been published that illustrate sustained policy attention on how best to activate redevelopment both within the docklands and as part of broader planning. Currently the North Docks is largely under construction with planning permissions in place for remaining sites. The transition area connecting the City Centre and the South Docks has seen significant recent development, particularly in commercial office space targeted at multinational companies. Areas in the South Docks still operate as a working port with associated industrial and business uses, but relocation plans are underway for the Port of Cork to relocate to Ringaskiddy by 2024. This relocation process is a crucial element in enabling the wider regeneration of the South Docks and Tivoli Docks (Ringaskiddy Port Development, 2019).

3.3.1 Cork City Development Plan 2015-2021

Cork City Development Plan 2015-2021 is the main strategic planning policy document that guides the future development of the city. Within the plan, Chapter 13 focuses on the City Centre and Docklands. It envisions that Cork City and the Docklands will be a desirable place to live and work, with dedicated retail areas, new hotels and waterfront necessities. The Docklands are considered to be the biggest development opportunity for Cork City. The vision is one of mixed-use and socially-inclusive spaces. It notes that the North and South Docks are of particular interest due to the four kilometres of waterfront which could be used for water access and amenities. The North Docks in particular are co-located with the railway station and other key transportation hubs to form a new city quarter. The vision is of a mixed-use redevelopment as illustrated in Map 3.1. Work is underway for the next City Development Plan 2022-2028.

Map 3.1 Prioritisation of key activities in Cork docklands



Source: Cork City Development Plan

3.4 Planning for the commercial port area

In May 2015, An Bord Pleanála (Irish Planning Board) granted permission for the redevelopment of port facilities at Ringaskiddy, Co. Cork which is located in the lower Cork harbour. There are several reasons why the commercial port is relocating:

- Existing physical constraints – the port needs to be able to accommodate larger vessels and adapt to changing port functions in order to remain competitive;
- A new container terminal with a 360m berth;
- Port of Cork is a key national and regional asset for growth;
- The relocation of the port from Cork city will allow new economic spaces to develop, opening up sites for compact urban development within the city;
- Cork Port is a designated medium-sized European core port within the TEN-T Network. This position will become more significant post-Brexit;
- Ireland currently relies on a landbridge via the UK to France. In the context of Brexit new routes may have to be found. The Port of Cork Authority are confident that these routes, will be opened and they will be important to ensure the economic sustainability of the ports move to Ringaskiddy.
- An €80million container terminal is currently under construction and is due to open in Spring 2020. This will replace the existing container terminal at Tivoli docks. It is planned that other port activities including those on the City Quays, will gradually relocate downstream helping to unlock the on-going regeneration of the Cork Docklands.

4 Main stakeholders

The key stakeholders of significance to the regeneration of Cork Docklands are outlined in Table 4.1.

The public sector comprises state-owned agencies and central government departments. Each have different roles and areas of expertise in relation to the regeneration of Cork City. A new addition to the institutional landscape has been the Land Development Agency. This new agency has an immediate focus on managing the State's own lands to develop new homes, and regenerate under-utilised sites. In the longer-term it will assemble strategic landbanks from a mix of public and private lands, making these available for housing development in a phased manner that aims to bring essential long-term stability to the Irish housing market. This agency will potentially play a critical role in mediating between public agencies, private actors and funding agencies in Cork Docklands.

The private sector has taken a lead on some docklands sites on the edge of the city centre, through, for example, the development of One Albert Quay, Navigation Square, Horgans Quay HQ and Penrose Quay, Cork. The private sector is currently focused on office, housing, hotel, retail and commercial construction in the North Docks and on sites adjacent to the city centre, and will play a crucial role in unlocking the south docks given it is largely in private ownership (see Map 5.2 below). The role of business champions such as Cork Chamber and Cork Business Association is in promoting economic development and a positive business environment within the city.

As described earlier in the report, the Port of Cork is in the process of relocation but still has some landholdings close to the city centre. It strategically controls a number of key sites in North and South Docks and is the majority landowner in Tivoli Docks. Currently discussions are underway with the City Council to agree the transfer of a section of the city quays to council ownership for quality public realm which will be to the benefit of all other private developments within south docklands.

Table 4.1 List of relevant stakeholders

Stakeholder grouping	Name of organisation	Organisation type	Role in relation to the port/city
State bodies	Port of Cork	Commercial semi-state body	Majority landowner in Tivoli Docks and owns some lands in City Docks. Manages and maintains the commercial port area, relocation, as well as port equipment related to commercial, fishing and passenger ship repair activities.
	Irish Rail	State transport company	Operator of the Irish rail network / landowner. Development partner on Horgans Quay site in North Docks.
	Bus Éireann	State transport company	Operator of the Irish Bus service.
	Land Development Agency	State agency	It is the agency in charge of coordinating across state actors and activating state lands for housing and other uses
	Irish Water	State agency	Irish Water is the water utility company for Ireland. They have responsible for water and wastewater services.
	National Transport Authority	State agency	It is the national transport authority and is the licensing authority for public transport across Ireland.
	Transport Infrastructure Ireland	Public body	Role is to deliver transport infrastructure and services, which contribute to the quality of life for the people of Ireland and support the country's economic growth.
	Bord Gais	Public Body	State owned gas supplier
	Electricity Supply Board (ESB)	Public body	State owned electrical supplier.
	Office of Public Works	Public body	Supports the development and implementation of policy regarding property and flood risk management.
Central, regional and local government	Department of Planning, Housing and Local Government	Central government department	Is the national governments department focused on sustainable development, housing, economic growth and regeneration etc. It is the parent department of regional and local authorities.
	Southern Regional Assembly	Regional government	The southern regional assembly has core responsibilities for the development and implementation of regional spatial and economic strategies and the management of EU funding.
	Cork City Council	Local authority	Cork City Council is the main body responsible for local government in Cork City and functions include promoting urban development and regeneration including regeneration of the docklands
	Elected representatives	Public	At the national, regional and local scale representatives have the right to lobby on behalf of Cork City and the required infrastructure needed for sustainable development particularly under Project Ireland 2040 where Cork is identified as nationally important for growth.

Civil society	Public Participation Network, Local residents and citizen groups	Public Participation Network, General Public, local community groups	Express opinions and contribute to consultations on projects in the city. Also directly impacted by project outcomes.
Private sector	Gerry Wycherley	Private company	Controls significant land interests in south docks
	Origin Enterprises	Private	Controls significant land interests in south docks
	Glenveagh Properties	Private / public limited company (PLC)	Controls significant land interests in south docks
	John Cleary Developments	Private	Property development company with active sites adjacent to docklands
	BAM Ireland	Private	Property development company with active sites adjacent to docklands and the recent purchases in the North Docks.
	O'Callaghan Properties	Private	Property development company with active sites adjacent to docklands and recent purchase of the Origin site in the South Docks.
Representative bodies	Cork Business Association	Not for profit representative body	Represents the interests of Cork Businesses
	Chamber of Commerce	Private, representative body	Promotes the economic and commercial development of the Cork region.

Source: Authors, ESPON ENSURE (2020)

5 From vision to realization

“The future of Cork I think is in a really good place... the relative success of that is probably going to be decided by how successful this particular project is in its broader sense in terms of the growth, the development of the movement of the port, of the development of the North-South docks, Tivoli, and so on.” (Interview participant 05)

5.1 Introduction

Renewed attention is being placed on Cork by central government through the National Planning Framework, National Development Plan and the availability of new central government Urban Regeneration Development Funding. The conditions for successful regeneration are in place, but this is contingent on three key issues being addressed:

- relocation of the Port of Cork operations and other related businesses currently operating in docklands;
- the sale of industrial land and its decontamination and repurposing; and
- the provision of key infrastructure.

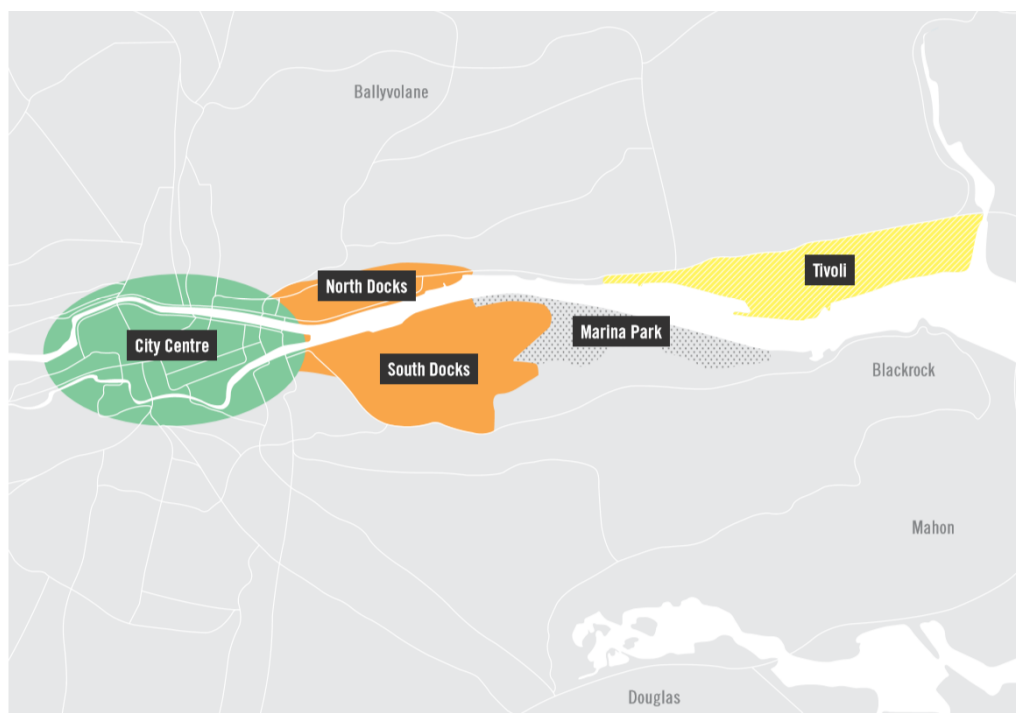
Regeneration in Cork is well underway with significant demonstrated interest from private investors and developers. Particular projects of note are:

- Significant office and hotel developments within the transition area east of the city centre and adjoining City Docks;
- The rejuvenated Kent Train Station, the Horgans Quay HQ Cork development (housing, offices, restaurant and shops) and Penrose Dock Development (Office) in North Docklands, and
- Delivery of 1st phase of the Marina Park and the redeveloped Pairc Ui Chaoimh (50,000 seater stadium, conference facilities and 4G pitch)

5.2 Visions for docklands regeneration

This section focuses on the vision and outcomes to date across three key areas of the docklands: North Docks, South Docks and Tivoli (Map 5.1). Quite different paths to development and outcomes are evident across the three sites, which represent different stages of the regeneration process.

Map 5.1 Contextualising key sites in the Cork docklands



Source: Cork City Council (2017)

5.2.1 The vision for North Docks

The North Docks, with a 1.4km river frontage, are centred at Kent train station and extend from the north city centre east. The Cork Docklands Development Strategy (2002) and City Development Plan (2004), highlighted the strategically important nature of north docklands to the future of urban development in Cork. Supporting this, a Local Area Plan (LAP) was devised in 2005 creating the planning basis for the regeneration of the 17ha site that represents approximately 7% of the Cork Docklands. Key elements of the plan included more efficient public transport, new office space, a regenerated railway station, a new conference centre and higher density living. The vision was to create spaces for work, living and leisure well connected to public transport and with good connections with the city centre and commercial core.

The regeneration of the North Docks is well advanced and includes land transfer between the state transport agency Coras Iompar Eireann (CIE) and private developers, as well as redevelopment of nearby privately-owned sites. The re-development of the area immediately around Kent train station and the re-orientation of the train station towards the city centre is a catalyst project in the North Docklands. A team of architects, urban planners and designers proposed a detailed strategy and vision for the new built environment of Kent Station, and this was completed taking account of a design brief prepared by Cork City Council for 3 ha of land around the train station. This cooperative approach in 2015 set in motion the delivery of significant regeneration schemes now currently under construction.

The remodelled train station entrance was completed in 2017 and has opened up the southerly aspect to the River Lee and the City Centre and helped unite the city centre with the Cork waterfront. This provides a link to Cork City centre for the 2 million passengers using the station every year. The Cork Metropolitan Area Transportation Strategy (2019) includes proposal for a new Bus Rapid Transit (BRT) system connecting the North Docks/Kent Station to metropolitan towns such as Ballincollig. The Cork to Dublin route, from Kent station, is the top performing inter-city line in Ireland and the newly adopted Cork Metropolitan Area Transportation Strategy (2020) also highlights the centrality of the station for future rail linkages across the metropolitan area. North Docks is the most advanced area of the Cork docklands regeneration project and much of the current construction is due to be completed by August 2020.

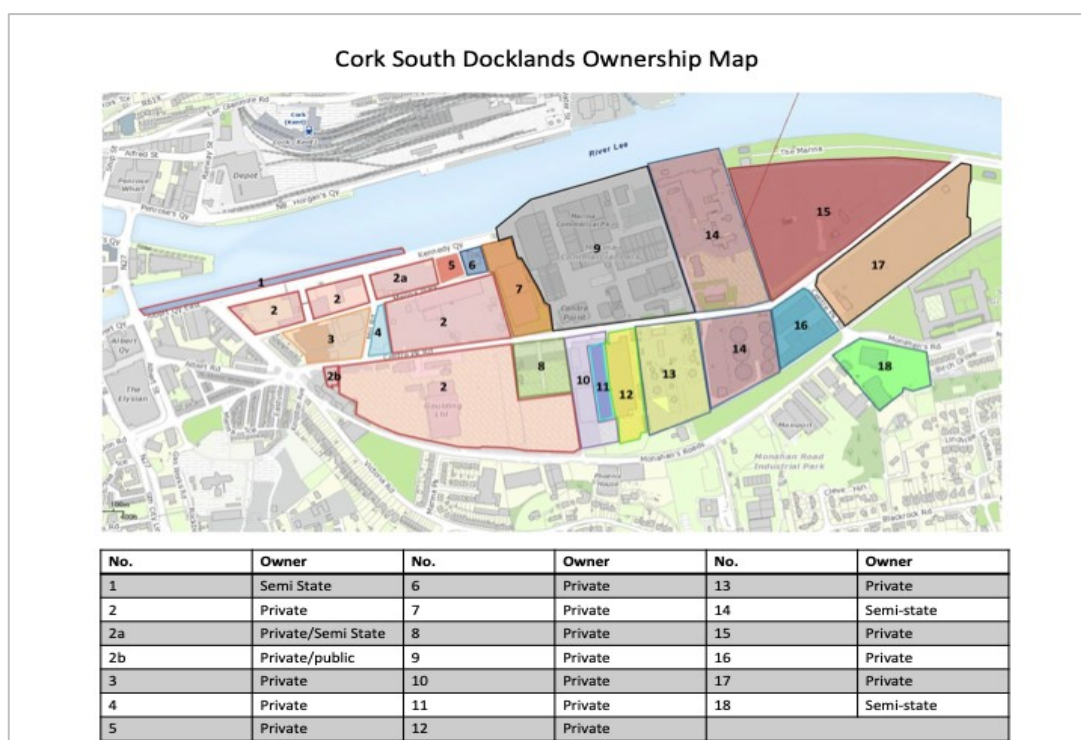
5.2.2 The vision for South Docks

The south docks extend from Custom House Quay at the eastern end of the city centre along the Marina to Blackrock. It is roughly bounded by the escarpment behind Monahan's Road to the south and the River Lee to the north. The plans for the South Docks were also initially described in the Cork Docklands Development Strategy (2002) and proposed a broader vision than that for the north docks. There was a stated ambition to create a new identity for the area, incorporating mixed-use development for living, working, learning and play and sustainability was a key theme. In 2008, the South Docks Local Area Plan was published and focused on mixed-use development.

The South Docklands Local Area Plan (2008) promoted a vision of sustainability, incorporating energy efficiency standards to all projects and proposing higher density living. Enhanced connectivity between the South Docks and the city through new bridges supporting new public transport, cycling and walking was a key objective. Improved environmental quality including flood management strategies, decontamination and an enhanced public realm were central in the creation of a new urban quarter that would house 20,000 inhabitants and support 25,000 jobs.

Regeneration is beginning in the south docks, while the transition zone between the city and the docks has been substantially redeveloped. Progressing regeneration in this area is more complicated due to the fragmentation and mix of landownership (Map 5.2) and the presence of existing businesses. The land is owned by a mix of the Port of Cork, State Bodies and Private entities. Recent urban policy changes including the establishment of the Land Development Agency (LDA) and the introduction of the Ireland Strategic Investment Fund (ISIF), and the Urban Regeneration and Development Fund, to fund key projects, will be key enablers of regeneration in both City and Tivoli docklands.

Map 5.2 Land Ownership in south docks (Source: ESPON ENSURE project)



Source: Authors, ESPON ENSURE (2020)

As well as the sites already proposed for development, there are also larger sites such as the Origin site which has the capacity to house substantial development once the site is remediated and have recently been sold to O’Callaghan properties for re-development.

5.2.3 The vision for Tivoli

The regeneration of Tivoli Docks is reliant on the partial or full relocation of the port of Cork to Ringaskiddy, but future visions for the area have been outlined in the Port of Cork and the Royal Institute of Architects of Ireland (RIAI) document ‘Tivoli: A New Perspective” (2017) and the Tivoli Docks Issue Paper (2017) produced by Cork City Council. Tivoli is a site of 61.5 ha, located on the north bank of the River Lee about 2.5 km east of the City Centre. It is bounded by the Cork-Cobh rail-line, the N8/Lower Glanmire Road to the north, the river Lee to the south and the Glashaboy River to the East.

The Port’s design brief for Tivoli notes key interventions required to free up the site for development:

- re-location of port operation at the city quays and transfer of ownership;
- relocation of existing businesses from Tivoli;
- relocation of SEVESO sites (Liquid Petroleum Gas (LPG) importers, Flo Gas and Calor Gas Ltd);
- remediation of contaminated land;

- improvements to public transport infrastructure including new train station and improved walking, cycling and road access.

Cork City Council Tivoli Docklands Issues Paper (2017) is a positioning paper for a future local area plan. It highlights the potential of the site as well as recognising the challenges of regeneration due to previous land uses, including the presence of SEVESO sites and relatively poor accessibility.

Tivoli is recognised as an area of significant potential to wider city and metropolitan development, and already contains important infrastructure such as water and power. The location of the train line adjacent to the site allows for the delivery of a Transport Orientated Development (TOD) approach based on delivering sustainable transportation movements. Its water frontage is a significant asset and could contribute to the development of Cork's identity as a maritime city. It is estimated that a minimum of 3,000 residential units could be constructed to house a population of 8,000 and a working population of 4,000. This would be a significant increase as currently approximately 300 employees are currently working in the area.

Given the scale of Tivoli, it has the opportunity to create 3 unique neighbourhoods and prove attractive to young workers. A new Local Area Plan will ensure that welcoming public spaces and amenities are central to the vision, such as playgrounds and greenways, as well as sustainable and active travel options. Cork City Council recently commissioned AECOM and Butler\Cammoranesi Architects to prepare an Urban Design and Landscape Framework Plan for the waterfront site at Tivoli Docks. It noted three major infrastructural adaptations, mirroring the findings of the earlier Port of Cork design brief, required before a local area plan can be realised;

- Port of Cork operations and other Quayside activities are relocated.
- SEVESO facilities need to be relocated, cleaned and the land re-zoned. There are two SEVESO sites in Tivoli and these must be relocated.
- Greater access through existing infrastructure including the development of public transport, cycle and walkways. Current road and rail infrastructure will need to be adapted to serve this area.

Cork City Council have also commissioned Jacobs to produce a Tivoli Area Based Transport Assessment which shows how Tivoli can be sustainably accessed, primarily through sustainable and active travel measures. At present there is also an Urban Density and Tall Buildings Study underway.

5.2.4 The vision for “City Docks”

Since the publication of the City Development Plan (2015-2021), the North and South Docks have been increasingly referred to in planning terms as the Cork City Docks. The Cork City Docks 2017 Issues Paper is the precursor to a new Local Area Plan, and it outlines six key

priorities central to creating the docklands as a coherent development zone. The overall vision is to create a “vibrant mixed use and socially inclusive urban quarter that will capitalise on the intrinsic advantages of the area “(paragraph 13.60 of the City Development Plan, 2015-2021: p202) can actually develop. The regenerated city docks will function as an expansion of the city centre and thus requires a mix of residential, commercial and service activities. Six key issues are identified:

- **Housing:** Between the north and south docks there are 97Ha of development sites which could result in over 18,280 new homes in the area. These will be crucial to achieving the vision of higher density living and addressing market demand.
- **Employment:** There are over 150 international companies in Cork city with a diverse workforce. North Docks currently hosts 133 businesses with 940 employees, but it is expected to grow this number to 4000. The South Docks has 296 businesses and 2000 employees with a projected growth to 25,000 employees.
- **Place making:** Enhancing the attractiveness and functionality of the docklands is critical and there is potential to learn from international good practice in waterfront regeneration. Significant water frontage is available and can be strategically harnessed.
- **Infrastructure:** “Building on Recovery: Infrastructure and Capital Investment” assigned €42 billion to infrastructure investment between 2016-2021 across Ireland and the docklands should benefit from some of this to deliver better public transport, water infrastructure, community services, and enhanced connectivity.
- **Delivery Challenges:** The development of a flood levels strategy, and transport and urban design strategies are all currently being progressed by Cork City Council. A levels strategy report was prepared for Cork City Council in conjunction with AECOM in a response to site-wide and city-wide flood risks in the area including the need to reinforce existing polder walls and develop a climate strategy. A series of engineering solutions have been proposed. An Area Based Transport Assessment (ABTA) of the Cork City Docks and Tivoli Docks to assist with the preparation of new Local Area Plans (LAP), to guide the long-term development of the area has also been completed. Six key transport issues to address are:
 - Establishing mass rapid transit;
 - Active discouragement of vehicular traffic;
 - Car parking restraints;
 - Development of multi-modal and multi-functional ‘mobility hubs’;
 - Use of Mobility as a Service (MaaS) services to support low car use – extension of Bicycle Sharing Systems (BSS), car club schemes, smart ticketing options, ferries;
 - Maximising river frontage as areas of high-place value, supported with high quality environment and linkages for active modes.

- Climate Change and Sustainability: The environmental assets of the area should be enhanced and the carbon footprint of the area reduced. South Docks offers potential to implement best practice solutions to natural drainage and ecosystem services.

6 Economic, social and other impacts

This section considers the expected and observed impacts of the regeneration process in Cork, in terms of socio-economic and cultural trends, including demography, identity of the city and of its inhabitants. Given the very recent nature of regeneration, long-term impacts are not yet visible. However, the potential impacts of the planned and ongoing regeneration over the coming years are discussed below.

6.1 Attraction and integration of new inhabitants

Currently there is an undersupply of housing in Cork as developers have favoured large scale commercial development. Across the stakeholders interviewed there was general consensus that the critical issues in attracting and integrating new inhabitants relate to infrastructure and the high costs associated with some development sites. Our interviewees suggested that concerted government intervention would be necessary to solve the housing crisis, and that the new Land Development Agency (LDA) will play a crucial role in assembling sites and partnering with developers with a proven track record to deliver housing. There is a need to develop better public transport infrastructure, services and facilities. The recent large-scale planning application under the fast-track Strategic Housing Development (SHD) legislation would indicate that greater confidence in the residential market is now translating into increased supply. This may also be influenced by a greater focus on identifying strategic infrastructure provision in the National Planning Framework and providing funding routes through the National Development Plan, Urban Regeneration Development Fund and Ireland Strategic Investment Fund.

6.2 Attraction of new functions

Most plans and strategies for Cork docklands to date have relied on a mixed-use model to include residential, offices and ancillary services. Many of our interviewees suggested that because of the brownfield character of docklands and the scale of available land, that there is potential to develop a large-scale facility of some type, for example a technology campus that could act in synergy with the planned expansion of University College Cork Business School nearby. A large-scale development could act as a major catalyst for further development of the wider area.

Another option could be a major cultural facility or anchor attraction to develop tourism and leisure-based activities to complement existing city centre offerings. The university could potentially be a strategic partner in developing such an attraction.

6.3 Preservation of the port heritage

The Port of Cork and links to the sea have been a significant element in Cork's historic identity. Retaining heritage within a newly renovated docklands will be a challenge as has been the case in other cities that have undergone waterfront regeneration. Harnessing the cultural heritage is critical to a sense of identity and sensitive, high-quality development that balances new development with heritage could provide a high-quality environment. How the Horgan's Quay, Cork project evolves may provide important lessons.

6.4 Urban qualities

The character of the urban environment is set to change as low-rise, extensive land uses give way to higher density development and a greater variety of activities. Higher-density buildings provide an opportunity to create more sustainable urban quarters. One interviewee summed up the change that is coming as "going to get rid of dirty industries, oil and all the other stuff that's down there" (Interviewee No.4), to create a high-quality urban environment to support economic development and increase the attractiveness of the city. The urban design frameworks already in place suggest that docklands will become a live-work-play-visit destination. The creation of a sense of place is critical to ensure development momentum is sustained and increased.

6.5 Changes in the mental maps of the city

While relocation of port operations to Ringaskiddy opens up the opportunity to reconnect the docklands to the city centre, or extend the city centre into docklands, managing the new port city relationship will be important. The maritime past is an important part of Cork's urban identity. While port relocation might serve the physical relationship between port and city, soft policies (perhaps cultural in nature) could be used to retain the maritime heritage and past in mental maps of the city.

Port relocation, and particularly the repurposing of the quaysides, currently owned by Cork Port Company, will reconnect the waterfront and river frontage to the city. The proposed Lee to Sea Greenway would connect the city, through the south docks, to Marina park and beyond. Similarly, the proposed Euro velo-cycle route on the south side of the river would connect Tivoli to the city centre.

6.6 Regional, national and international impacts

The redevelopment and regeneration of Cork docklands (north, south and Tivoli) will help progress towards the national strategic outcomes identified in the National Planning Framework, National Development Plan, Regional Spatial and Economic Strategy (RSES),

Cork Metropolitan Area Strategic Plan (MASP) and Cork Metropolitan Area Transport Strategy (CMATS). This includes achieving more compact urban growth in the metropolitan region and meeting targets for development within existing urban footprints; to drive the regional economy through providing high quality employment, residential, tourism and commercial development; and to enhance quality of life through the development of new blue + green infrastructure and high quality public realm.

7 Regeneration process, projects and outcomes

Docklands regeneration in Cork can be divided into three distinct phases as outlined in Table 6.1. The first phase was cut short by the global financial crisis and Ireland’s property crash. Limited activity took place during the years of austerity as the financial and real estate system adjusted to new circumstances, although this was an important time for the development of the port strategic plan, and the transformation of investment and ownership patterns. Although some developments and land in Cork docklands were taken into NAMA (National Asset Management Agency), the area was not as affected as other parts of the country because large areas were still under the ownership of industrial companies operating in the docks. The period from 2008 to around 2015 was thus characterised by a few development proposals, but little in the way of delivered projects. Since 2015, activity has dramatically increased, particularly in the North Docks and the transition zone between the city centre and the South Docks. This indicates a new wave of urban and economic development in the city and a renewed focus on the opportunities of the docklands regeneration. Major development projects during this period have been driven by a small number of major Cork property developers, and more recently large international property developers and investors.

Table 7.1: Timeline of key projects and events

Phase	Date	Event
Phase 1: Initial planning (late 1990s to 2007/08)	2002	Publication of Cork Docklands Development Strategy
	2005	City Quarter
	2008	Elysian
	2007-2008	Publication of LAPs for North Docks and South Docks
Phase 2: Austerity and challenge (2008-2014)	2008-2013	Adoption of the Reference Plan for the regeneration of the commercial port
	2013	JDC acquires Albert Quay site
Phase 3: Renewed attention (2015+)	2016	One Albert Quay
	2018	Kent Station Improvement works
	2019	Navigation Square under construction
		Penrose Dock under construction JDC Albert Quay Apartment scheme in planning HQ Horgans Quay (Planning and construction phase)

Source: Authors, ESPON ENSURE (2020)

7.1 Regeneration outcomes in the north docks

In July 2016, Clarendon Properties in partnership with BAM Ireland secured the development rights to a 2.5 ha waterfront site at Horgan’s Quay (HQ development) in Cork City owned by the state transport company, CIE. Clarendon Properties and BAM Ireland obtained a 300 year ground lease from CIE in return for a good rental return. The mixed-use scheme is currently under construction, including the 136-bed Dean Hotel and 37,000 sq. m of offices in three blocks and around 2,900 sq. m of retail and leisure space (HQCork, 2019). Recently, the developers have reapplied for permission for the residential element through the Strategic

Housing Development (SHD) route, to increase the number of residential units originally approved. The development will consist of apartments ranging in height from 7 to 10 floors and will consist of 302 apartments. It will also include a creche, retail units with ancillary developments. It is anticipated that the completion of this development within 12-18 months will be a major milestone, although there are sites such as McMahons builders' yard to the east that represent future redevelopment opportunities.

On the western edge of the HQ development, Penrose Dock is a €125m office development consisting of 23225.76 sqm on a 0.73 ha site currently under construction and being built in one single phase. Designed by Wilson Architects, the two Gold LEED buildings, of 7432.24 sqm and 15793.51 sqm with open floorplates of up to 1858.06 sqm, along with open public plaza, gym and cafe (plus an upgrade to the listed 1114.84 sqm 1838 limestone building Penrose House) will be ready for tenant fit-out by April 2020 (Penrosedock, 2019).

7.2 Regeneration outcomes in the south docks

As the South Docks is still an operational port area with associated uses, it is a more challenging regeneration area. However, the transition zone between the core South Docks area and the city centre has seen significant development momentum in recent years. Three specific projects are: the City Quarter development on Lapps Quay, the Elysian on Eglinton Street and One Albert Quay.

Figure 7.1 Lapps Quay Hotel development



Source: Stw architects (2019)

City Quarter, which opened in 2005, was the city's first docklands scheme. The development consists of the Clayton hotel, cafes and associated facilities. Significantly, the developers also provided a new boardwalk, to facilitate the quayside promenade being used as a space of leisure and amenity. In exchange for this infrastructural contribution, the developer received

permission for additional building height and the removal of an existing street that bisected the site.

The Elysian development on Eglinton Street comprises a 17-storey “landmark” tower, offices, retail, a new street, amenity area and landscaping. Such landmark buildings – intended to be strategic placed in the city – were proposed in the original docklands strategy and the 2004 City Development Plan. The tower is situated at the confluence of entry points to the city, and is one of the most iconic examples of new architectural forms in the city. It was constructed on the former sorting offices of the postal authority An Post behind the City Hall. The opening of the Elysian coincided with the property crash of 2008. For a time, the tower became renowned as one of the most iconic ‘ghost’ structures in the country, with only 25 units in the complex sold by 2011. The Elysian cost €150 million to build but was sold by NAMA to global property investors Kennedy Wilson for €90 million in 2018 (Barker, 2018).

Figure 7.2 The Elysian



Source: The Elysian (2019)

The One Albert Quay development (Figure 6.3) is viewed as highly significant in kick-starting a new phase of development interest in docklands. Opened to much fanfare in 2016, it is a €60 million office complex providing headquarters for international technology companies. Tycho is the anchor tenant. At the time of construction, it was the largest office complex in Ireland outside of Dublin and “the smartest building in Ireland”. Built to new environmental and technological standards the 16258.03 sqm development, which was 60% pre-let during its construction phase and 95% let just three months after opening, has been a flagship for new commercial construction in Cork city centre. Having built a reputation for office parks in suburban locations, the developers (JCD) were attracted to the city centre during the recession, acquiring a number of strategic central locations including the Albert Quay site. It has recently been announced that JCD will develop a second Albert Quay site to include a 25 storey 'Build-to-Rent' €90m scheme of 201 apartments.

Figure 7.3 One Albert Quay



Source: One Albert Square (2019)

In between the two JCD sites on Albert Quay, O'Callaghan Properties' Navigation Square is a €90m office development comprising of four separate, differently designed, blocks on a 1.1 ha site, that will accommodate up to 3,000 employees and more than 33,445 sqm of office space once fully completed. The development includes new public spaces along with restaurants and leisure space fronting on to the river Lee. Together, these developments have contributed to filling in the intermediate zone between the city centre and the South docks.

7.3 Other urban development projects

While development in the north docks is well advanced, and development in the south docks is picking up pace, development in Tivoli is dependent on the port of Cork continuing the roll out of their relocation strategy to release the land for urban uses. Across Cork, other significant infrastructure and development projects are contributing to a sense of development momentum. These include:

- Light Rail Tramway: there are currently discussions around creating a Cork light rail system in the medium to long term which would connect Ballincollig to Mahon via the Docklands and the City Centre. If this was implemented it would enhance the attractiveness, connectivity and marketability of the whole docklands. Based on recently published transport strategies, a BusConnects project is being proposed along the same route over the short to medium term.
- Custom House Quay (CHQ). An ambitious planning application has been lodged with the city council by New York-based Tower Holdings for a 140-metre tall skyscraper at Custom House Quay comprising a 34 storey hotel, the refurbishment of historic buildings included bonded warehouses for tourist related uses and an enhanced public

realm. The site is owned by the Port of Cork and a decision on planning is due from Cork city council in late September 2019.

- The Prism: An office development by the same company as the CHQ, has recently received planning permission for a 15-storey high glass prism offering a 360-degree panoramic view of Cork City and is proposed for the transition zone between the south docks and the city (see Figure 7.4).

Figure 7.4 Location of the proposed Prism development



Source: <https://theprismbuilding.ie/location/>

8 Challenges, risks and drivers for change

As noted in previous reports (e.g. Wrixon, 2008), Cork has many conditions favourable to port regeneration but is also characterised by a number of key challenges. These challenges relate to the relocation of the Port of Cork operations, issues of landownership, decanting of SEVESO sites, remediation of contaminated land, the delivery of strategic infrastructure, and the speculative and cyclical nature of property investment and development in Cork. To briefly synthesise each of these factors in turn:

- The regeneration of City and Tivoli docklands requires the relocation of the Port of Cork from the city quays and from Tivoli. While agreement on the desirability of relocation of the Port from the City Quays has long been in place, arbitration is currently underway to determine a land value that will be applied to the transfer.
- Several large landowners in North and South Docks are semi-state and industrial companies. Activating these sites for redevelopment may require the sale of these lands. The relocation of industrial activity will also require decontamination of SEVESO sites. It is not clear who will pay for decontamination or where the risks and liability of such activity will fall. Remediation responsibility lies with the landowners.
- The regeneration of the docklands is dependent on the provision of strategic infrastructure, including new bridge(s), road networks, expansion of public transport, public open space, water infrastructure and provision of education facilities. Much of this is dependent on funding from central government which is allocated on a competitive basis across the country despite being identified as key development in the National Development Plan and National Planning Framework. The local authority has applied for funding but has no guarantee that its projects will be successfully awarded necessary capital.
- The viability of new development in Cork is influenced by both the ability of property developers to attract foreign and domestic direct investment and by the price of land/development costs relating to property market cycles. As such, the timing of development will have an influence on the delivery of the overall project.
- There are numerous agencies from various scales of government involved with the project. Coherent and cooperative multi-level governance is required, as well as accountability between the different stakeholders. However, strengthened regional and metropolitan planning, as well as new institutions such as the Land Development Agency, should mitigate this challenge.
- There is concern by some of tidal flooding in the south docks. Currently a variety of proposals for mitigation measures are under consideration.
- Achieving the right mix of uses and demographics within the overall regeneration of Cork Docklands is an ongoing challenge. To date, the transition has been centred on the construction of new commercial uses (e.g. office, hotel). There is a need to achieve

a balanced mix of other uses (education, community, cultural, etc) and residential profile to create a new liveable city area.

- The challenge of delivering a sustainable environment and walkable neighbourhoods requires front-loading of the right infrastructure that delivers well connected public transport systems and minimising the role of the car in the city.

While all stakeholders recognise, to varying degrees, that docklands presents a major development opportunity for the city to reposition itself nationally and internationally, there is also a recognition that there needs to be an alignment of the appropriate policy measures, governance arrangements and property market conditions for the ambition to be achieved. This mix of optimism and caution is captured by one property developer who described the docklands as “a phenomenal blank canvas really to develop the city” (Interview Participant 04) but recognised the serious challenges that need to be first addressed.

8.1 Population

A major challenge for population growth is the delivery of affordable housing. Developers are propagating a narrative that suggests that providing housing (i.e. apartments) in city centre locations is not currently financially viable. At the national level, developers have been lobbying for a reduction or elimination of VAT on apartments, further relaxing of building standards, and the elimination of third-party appeals (see Waldron, 2019). However, there has been a large volume of student accommodation completed or under construction and recent planning applications for large scale residential development suggest changes in the market interest that should lead to increased supply. As population grows and new areas are regenerated, issues around mobility and provision of social infrastructure such as childcare, health services, community buildings and schools need to be given priority in all plans as without these services, attracting families and cohorts other than young, single professionals will be considerably harder.

8.2 Environment

The key environmental concerns are flooding, particularly in the south docks; protection of Cork Harbour Special Protection Area; remediation of contaminated land and relocation of SEVESO sites. The latter is a significant challenge in terms of managing air, water and soil pollution. Budget 2009 introduced the SEVESO tax incentive to facilitate the relocation of Seveso sites but this is due to end shortly. In order to ensure that the SEVESO sites remaining in docklands are fully remediated and unlocked for redevelopment, this incentive may need to be extended or a similar measure reintroduced.

A key driver for some of the new construction has been energy-efficiency. Many of the new buildings are being constructed to the highest energy efficiency standards. This will contribute

to a lower carbon society, along with less car dependency and increased public transport provision to lower levels of air pollution and a higher quality living environment.

8.3 The planning processes, models and tools

While some redevelopment has been ongoing in Cork docklands for almost two decades, recent planning, institutional and funding changes are providing a key impetus to increased development momentum. Our interviewees stated that a key issue facing regeneration of Cork docklands is not planning per se, but about the delivery and implementation of national, regional and local plans. Existing plans have served the North Docks well but there is some uncertainty over whether the more complex South Docks, beyond the transition zone with the city centre, might require a more targeted intervention such as a fast-tracking planning model like Strategic Development Zone (SDZ) designation. The timing for progressing redevelopment at Tivoli Docks is in large part dependent on the timing of port relocation, but some interviewees argued that the timelag might be to the benefit of the broader project. As it is likely to become a predominantly residential area, bringing Tivoli on-stream at the same time as the South Docks could divert investment away from the latter. Given the stage of planning for South Docks and the level of attention it has been receiving, south docks is more likely to be developed first.

8.4 The role of public policy: Land Management

Land management is a critical challenge for Cork docklands on a number of fronts, but particularly because of fragmented land ownership. Where the land is in state ownership, the new Land Development Agency may be able to help to coordinate and broker agreements to transfer lands. One of the drivers behind the reluctance of the port and other agencies to resist the transfer of land at a discount is because the asset value of land is being used in some cases to prop up their balance sheets. The quays are of no monetary value to the City Council as they will take over full maintenance costs going forward, but they are important in terms of quality public realm and sustainable transport enhancement to support economic development. For example, there is significant added value for overall development from public open space along the quays including facilities such as the Lee to Sea greenway via City docks and the Euro Velo greenway via Tivoli and North docks.

Where the land is in private ownership, including a significant area of the south docks, redevelopment is highly dependent on a number of critical factors including the delivery of key infrastructure to unlock the development potential and viability of any project. Challenges also relate to how current industrial landowners such as Origin, who occupy a very large strategic site, are engaged as they will have to find a new site before they can relocate. The complexity of land management and sequencing is exemplified by the fact that Origin (a large private landowner) is waiting to access a site that the port currently occupies in the lower harbour.

8.5 The role of public policy: Infrastructure delivery

As part of the sustainable development of docklands, a reduction in car usage is critical but there is clear disagreement about how best to deliver an effective public transport system. Area Based Transport Assessments for all three sites (North, South and Tivoli Docks) support the shift from car to multi-modal integrated transport in order to accommodate a significant increase in population and enhanced mobility. The recently published CMATS has indicated that bus connects should be prioritised and the necessary funding will now need to be made available through capital budgets. In addition, two new bridges will need to be funded to enable permeability and accessibility: the Mill Road Bridge will accommodate high frequency bus connections, a future light rail transit system, pedestrians and cyclists; the Eastern Gateway Bridge will be a vehicular bridge with bus and cycle lanes.

Given the vulnerability of the Cork docklands to tidal flooding, the publication of the flood levels strategy will be important in encouraging development in the south docks but funding will need to be provided for the necessary engineering solution to be delivered.

8.6 The involvement of citizens

Public consultation is an important element of the Irish planning system and there is a statutory obligation to provide time within the planning process for responses to proposed development. Cork has a strong community development infrastructure that has been historically resourced through the City Council as well as other agencies including the Health Services Executive (HSE), but there is now an attempt to engage with NGO's to ensure that a range of voices, particularly those of new migrants, are heard in relation to new proposals. A key issue will be to ensure that citizen engagement extends beyond consultation on individual projects to get broader buy-in for a medium-term vision and plan for Cork. Some evidence of more sustained engagement with the changing city is already evident in the public debates taking place around traffic movement and bus zones in Cork and how they impact daily lives. In addition, the Public Participation Network, an independent grouping, has grown significantly in recent years and sit in the majority of City Council Strategic Policy Committees. This is an important channel of communication between policymakers and urban citizens.

8.7 Funding opportunities and initiatives

One of the key issues raised by stakeholders is the complexity involved in financing large scale regeneration programmes such as Cork docklands. Due to the scale of these projects, as well as the complexity of land ownership patterns, most waterfront regeneration projects require a mixture of public and private funding. In the post-crisis period, development in Ireland has

switched to equity finance models and this has very much influenced which private actors are undertaking development in Cork.

Given Ireland 2040 Our Plan ties strategic planning priorities with capital expenditure, a more favourable environment for public sector capital funding has been established. Key infrastructure is likely to be funded through the Irish Strategic Infrastructure Fund (ISIF) borrowing from the European Investment Bank (EIB), with other elements of the project potentially funded through the new Urban Regeneration and Development Fund (€2bn available to 2027).

In addition to these financing options, a range of other more experimental models to address infrastructural and other challenges such as housing might be used. These include land value capture which could attempt to harness value uplift for public purposes. Local authorities are reliant on central government to help deliver major regeneration developments, but in the absence of more substantial governance changes the local authority will need to work with, and innovate within, current structures in partnership with the private sector.

9 Conclusion and lessons learned

Since 2015, Cork docklands have moved from the nascent stage of waterfront regeneration to a more incremental, project-by-project approach. The pace at which redevelopment is occurring has increased significantly in the last 18 months and this is partly due to strategic planning changes. The importance of a national and regional planning framework that is supportive of local ambitions has become apparent in relation to Cork. In particular the RSES, CMASP (Strategic Plan) and CMATS (Transport Strategy) provide the context within which more strategic planning can now occur across the metropolitan area and opens up the wider regional significance of dockland redevelopment. The NPF requires that all city development plans and local area plans should be revised now that both RSES and MASP have been adopted, and this may be a game changer in terms of planning for docklands as there is potential to put much more emphasis on brownfield redevelopment, and perhaps a sequential planning approach, as a core strategy for the city.

The emergence of a new post-crisis property development regime has also been significant in translating strategic planning changes into new development activity in Cork. In general, Ireland's development sector, land ownership patterns, and financing models have undergone significant transformation since 2008. In Cork, local property developers have resolved existing projects stemming from the Celtic Tiger period and have been undertaking a new phase of ambitious projects. These projects have been facilitated by new equity financing models, which see a new set of global financial actors (such as Private Equity Funds, or alternatively international capital is mediated through Irish-based Real Estate Investment Trusts) become a key part of the Cork property market. In conjunction with the attraction of new foreign direct investment in terms of end-users, this new post-crisis property development regime has internationalised Cork's property and real estate market while at the same time being driven by local property developers.

The relationship between the Port of Cork and Cork City Council is critical in the unfolding of the story of docklands, and in enabling future possibilities. In particular, regeneration of part of the south docks and all of the Tivoli docks can only happen once the port relocates fully to Ringaskiddy. Managing these public sector relationships appropriately is a key to enabling change, particularly when governance structures require one of the semi-state bodies to operate like a business. They are therefore compelled to maximise land values to sustain their core operations.

The large-scale transformation of the South Docks and Tivoli Docks will, once completed, have significant impacts on urban identity and mental maps of the city. As stated in the original docklands development strategy, the redevelopment of the South Docks has the capacity to double the size of Cork city centre and, thus, fundamentally alter the fulcrum of the city's central business district and leisure spaces. Managing this transition in a way that retains the urban design qualities of the city as well as manages the shifting cultural heritage will be a significant

challenge, and one that is crucial to get right. The creation of a new residential quarter in Tivoli similarly has important implications for commuting and urban development patterns.

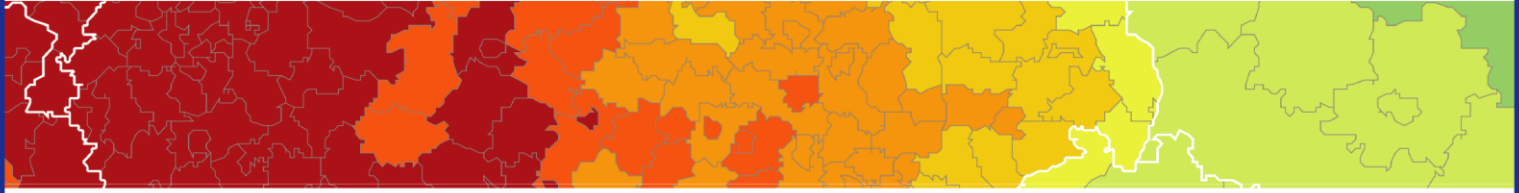
Furthermore, the regeneration of the City Docks has important environmental ramifications. The relocation of SEVESO sites and industrial uses is an opportunity to undertake key sustainability policies by remediating brownfield land in the city centre. Nevertheless, issues like flood risk relating to climate change will need to be addressed. Adequately adapting to changing environmental conditions will be a significant challenge, particularly if longterm mitigation is in conflict with short-term funding constraints.

While there are potentially a range of funding models that can be used to drive regeneration and redevelopment, the public sector must be prepared to frontload significant infrastructural investment. Previous experience has shown that passing the costs of strategic infrastructure and contaminated land remediation on to developers only creates disincentives to development and delay. A model of development that phases and mixes public and private sector funding, with innovative approaches such as land value capture (LVC), can potentially deliver significant investment. Land value capture is a model for enabling the public sector to recover and reinvest land value increases that result from public investment and intervention, and there are a number of ways in which this can be achieved such as the transfer of development rights or a betterment tax. However, the assessment of such a tax and mechanisms for assessing value uplift require significant financial expertise. The new Land Development Agency could be a key enabler of this approach to securing additional investment for Cork docklands.

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ESPON 2020 – More information

ESPON EGTC

4 rue Erasme, L-1468 Luxembourg - Grand Duchy of Luxembourg

Phone: +352 20 600 280

Email: info@espon.eu

www.espon.eu, [Twitter](#), [LinkedIn](#), [YouTube](#)

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