



Section 4

Northwest Regeneration Opportunity

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Section 4

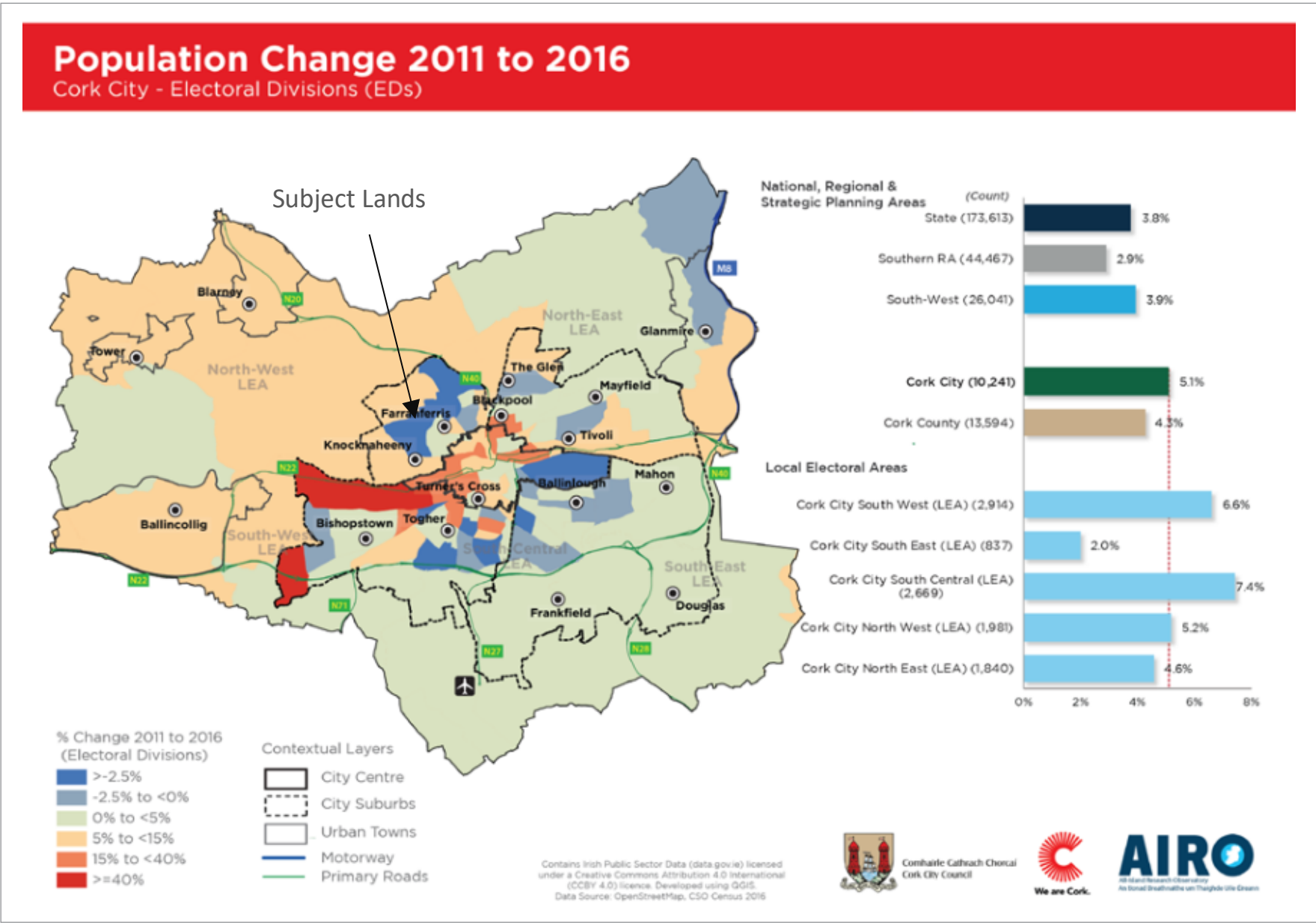
NORTHWEST REGENERATION OPPORTUNITY

The Cork City boundary extension represents a real opportunity to positively address a number of legacy issues that apply to the northwest suburb, and in so doing so, deliver on the wider Cork City strategic objectives which remain unrealised.

4.1 Housing

As outlined in Section 1.2, it is evident that Cork City will miss its 2022 housing targets by a considerable distance and is already well behind in the delivery of its 2031 housing target. Already only 4 years into the delivery period, the annual requirement has increased from 2,000 units to 2,541 units to address the shortfall accrued between 2016 - 2020. In the 2015 City Development Plan only 1,506 units in total (between Blackpool and the North West Regeneration Area) were specifically allocated to the northwest suburb quadrant. This lack of ambition for housing growth in this area is reflected in the population growth figure, in which at 3.22% it is significantly below the city average figure of 5.1%, and lower than all but one of the other constituent areas of the city and suburbs.

New Boundary - Suburb Quadrants	2011	2016	% pop change
NW Quadrant	22,608	23,336	3.22%
NE Quadrant	24,984	25,996	4.05%
SW Quadrant	36,927	40,442	9.52%
SE Quadrant	51,007	51,605	1.17%
City Centre	21,547	24,188	12.26%



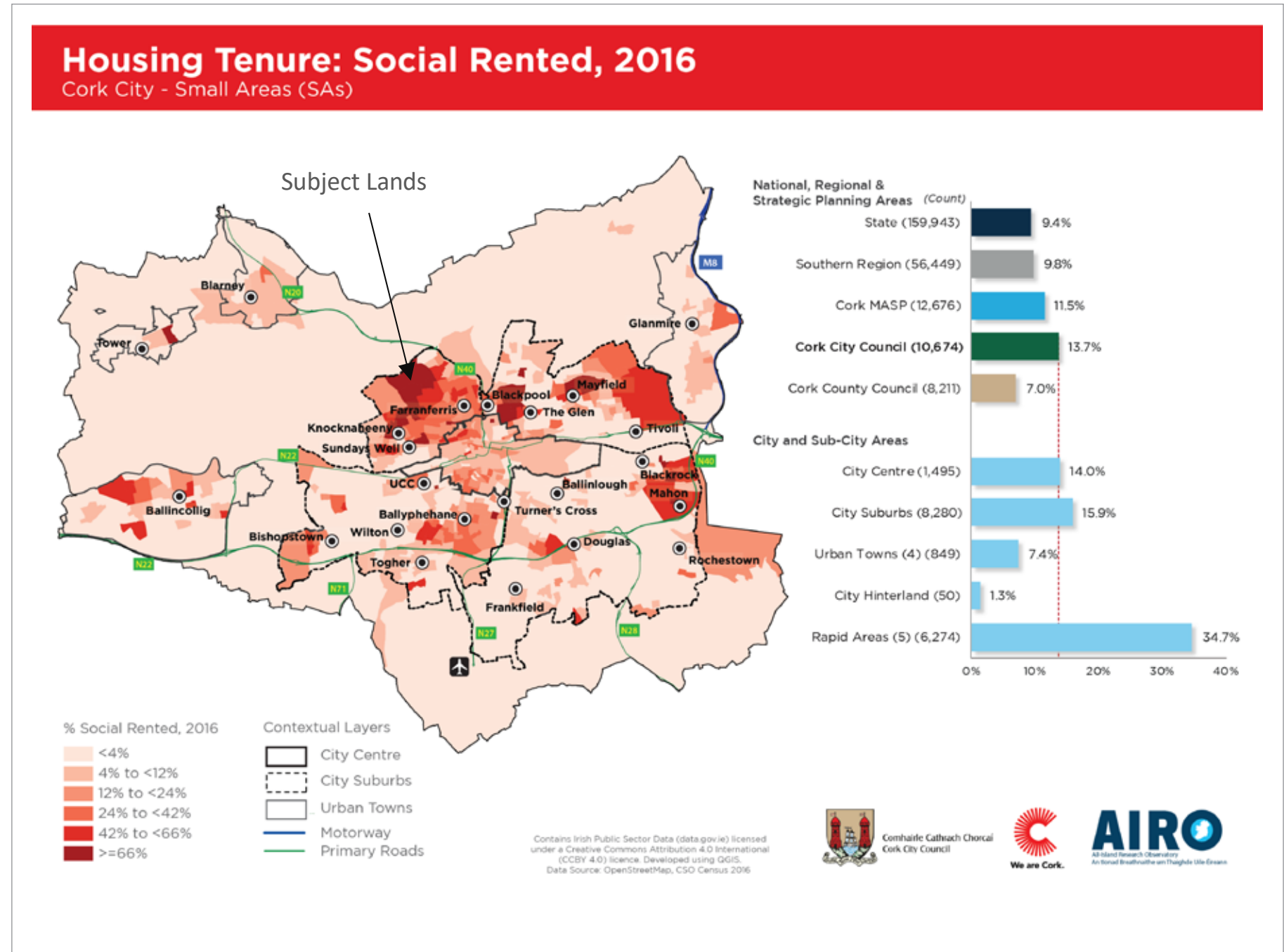


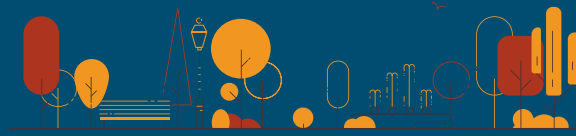
This lack of growth is not readily evident in the population change section of the City Council Issues Paper, where the area is aggregated into the relatively high growth figure for the North West Local Electoral Area (LEA) of 5.2%, by the inclusion of Blarney, Tower and parts of the city centre. Indeed, even the 3.22% growth figure for the northwest quadrant does not accurately portray the complexity of growth patterns in the area. Several areas did experience significant population increase, these are concentrated in the Blackpool area, also in the Meadow Hill area of Garranabraher, the North-West Regeneration Area of Knocknaheeney and Coppingers Acre in Churchfield. However, a significant number of Small Areas within the northwest quadrant experienced population decline during the 2011 – 2016 intercensal period, with the electoral division where the subject lands are located experiencing a 6% decline in population between 2011 and 2016.

Within this picture of the northwest suburb, with significant areas of strong population decline, it is also important to look at what type of housing characterises the area. The Issues Paper and Cork City Socio – Economic Profile provide valuable data in relation to the tenure of the existing housing stock. The average figure for Social Rented houses in the city is 13.7%, the percentage in the suburbs is 15.9% and as expected in the Rapid Areas, it is a higher percentage of 34.7%. However, in the electoral division where the subject lands are located, rented social housing is in excess of 66% of the total housing stock.

It is apparent from these figure that a fresh approach is needed to housing development in the northwest suburb, in line with the NPF National Policy Objective 6 which emphasises the need to rejuvenate urban areas. One of the guiding principles of the Cork MASP is to accelerate housing delivery in strategic residential areas. The RSES also emphasises the implementation of the “five-minute” or “ten-minute” sustainable city model, where short travel time and ease of access via sustainable travel modes is achieved between where we live, work, access services, access recreation and amenity inter alia. Hollyhill is recognized as a strategic employment area, where the co-location of housing is appropriate.

If the ambitious growth targets for Cork City are to be achieved, there is a need to counteract the population decline in the northwest and address the lack of balance in the housing tenure, where currently rented social housing dominates. A greater mix of housing types and tenures is required to accommodate the needs of different groups in society. This means that in addition to the continued achievement of social housing targets there is a requirement for the delivery of private housing.





Site Analysis

EXISTING RESIDENTIAL USE

The predominant use of the lands to the south and east of the subject site is residential. The existing housing stock is largely two storey, social housing. The Northwest Regeneration Masterplan is located to the south of the subject lands, and its implementation is underway, with the introduction of some variation in building heights and forms within a robust urban structure.

The Meadow Avenue Housing Estate shares a long boundary with the subject site, and there is potential for some connectivity between that estate and any new development on the subject site.

Existing housing to the north and west of the subject lands generally comprises pockets of one-off houses, in a rural condition.





4.2 Recreation

The provision of the North-West City Park (Knocknaheeny) has been a long standing objective of Cork City Council, as outlined in Section 11.21 of the current City Development Plan:

'A large park to serve the North-West of the city will be developed by the City Council in partnership with the County Council. It is important that the park be located close to existing residential areas to ensure maximum usage and benefit to the community. It will also benefit the overall regeneration of the area. The park should contain a variety of facilities e.g. sports pitches, hard surfaces, courts, amenity walkways, pitch and putt, children's play grounds, open parkland etc.'

However, the fragmented nature of the zoned lands due to the transboundary location of the proposed park, allied with perceived security issues have hampered its development to-date. The extension of the Cork City boundary provides a real opportunity to overcome these legacy issues and realise this long-standing and undelivered objective. The delivery of the long awaited Regional Park will contribute towards meeting placemaking and quality of life policies for this RAPID area and be in accordance new national and regional policy objectives.

After initial consultation with the City Council's Parks Department, it has been recognised that there is a need to consolidate the proposed recreational space into a regional park. While the area benefits from significant existing recreational and sporting facilities, these locations are dispersed and not always optimally-sited, with incompatible adjoining land uses, access restrictions, limited pedestrian and cycle facilities and minimal passive supervision to enhance security.

The proposed masterplan provides the impetus to address these concerns. It offers the opportunity to relocate the Castlevue AFC grounds, from their current location, adjacent to the light industrial use area, to an expanded and enhanced location within the new regional park. The relocated grounds will comprise 6 no. soccer pitches, including an all-weather pitch, and will incorporate changing rooms and other facilities. Similar, relocation opportunities are available to O'Neill Park. Pedestrian and cycle access to these relocated facilities will be provided, including public realm improvements, ensuring the safe access for recreational users of various ages. The existing Nash's Boreen Amenity Walk will underpin the site's permeability, forming the key to east-west circulation and interconnecting with north-south movement between the proposed residential blocks and variety of public open spaces. In addition to sports pitches, the proposed regional park will also include woodland walks and play areas and an urban activity zone. The proposed residential units bounding the proposed park will present a strong frontage onto the park, ensuring appropriate passive supervision.



Existing Open Space Area



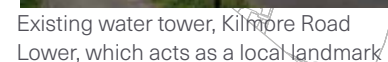
Reference Image of High Quality Architecture and Public Realm



Nash's Boreen Amenity Walk

EXISTING AMENITIES

The neighbourhood centre at Hollyhill, and the local centre at Fairhill provide retail and social facilities, and connectivity between these nodes and any future centre within the subject site is important.





4.3 Retail

4.3.1 District Centre Designation

The 2015 City Development Plan designated Hollyhill as a Neighbourhood Centre but recognises that the area may require improved convenience goods floorspace, lower order comparison goods, retail services, and social and community facilities. The City Plan considered that this Neighbourhood Centre designation may need to migrate to a higher order District Centre.

In order to establish the need for a District Centre to serve the area, a Knocknaheeny/Hollyhill Retail Capacity Study was commissioned by Cork City Council's City Northwest Quarter Regeneration Team in 2016. This report examined existing retail provision in Knocknaheeny/Hollyhill; to investigate available retail capacity; and develop strategy options for the future development of the retail offer locally.

The key findings from this study can be summarised as follows:

- Based on alternate 1% and 2% population growth scenario, estimated convenience spend for the population of the local area was between €48.5 and €51 million, with current and future available expenditure calculated at €13.5 million, rising to €19.7 million in 2022 justifying the provision of an additional convenience retail store of between 1,790 m² and 2,354 m² by 2022. If this is not met, it is likely that the area will suffer from revenue leakage to other areas.
- While prevailing policy suggest that Hollyhill Centre has the potential to develop from a Neighbourhood Centre into a District Centre to serve the northwest sector of the city; a preliminary site and development feasibility assessments suggest that it may be unviable to accommodate a new additional convenience store due to the following identified constraints:
 - » At c.1 hectare in area, the Hollyhill Centre is considered small is scale, with sloping topography and its dual frontage onto Courtown Drive and Harbour View could act as future design constraints;
 - » Redevelopment would require the relocation of complex infrastructure services;
 - » Complex ownership an leasing arrangements prevail;
 - » Increased retail development may necessitate the redevelopment of the public house and would require an underground or rooftop car parking solution;

The study, recognising the constraints pertaining to the redevelopment of Hollyhill Centre, recommended that Cork City Council should make suitable provision for a second convenience retail site in Knocknaheeny/Hollyhill. This should include consideration of the potential and suitability of Council land assets in the area to order to meet demonstrated capacity.

Notwithstanding this long help policy objective, almost 10 years on from the Cork City Northwest Regeneration Plan (2011), Hollyhill still functions as a neighbourhood centre. Its potential to develop as a district centre and act as a focus for regeneration in the area has remained unharnessed. In 2020 the RSES re-iterates this ambition for Hollyhill.

The current masterplan proposal has evolved from this ambition for Hollyhill and the and conclusions of the 2016 Retail Capacity Study in relation to the viability of redeveloping the existing Hollyhill Centre. The proposed XXX HA district centre, on the subject lands is located in close proximity to the existing Hollyhill Centre and significant opportunities exist to maximise connectivity between these areas through direct pedestrian linkages along Courtown Drive and via the Nash's Boreen Amenity Walk.

The proposed district centre site has capacity for anchor retail unit(s), small retail facilities, local services such as a cinema, car parking, offices and medium - high density residential development; public plaza and landmark architectural feature.

The Knocknaheeny/Hollyhill Retail Capacity Study, was undertaken in 2016, prior to the availability of the 2016 Census data. The following section, revisits the assessment of the retail capacity in the area in the context of the most recent census data.

The same retail catchment is used based CSO Census Small Areas within an acceptable travel time of Hollyhill Centre. The 2016 census data for the retail catchment indicated a population of 11,578 persons, approximating to an annual growth rate of c. 0.5% per annum from the 2011 census. This is significantly less than the 1% or 2% growth that was projected in the 2016 study when the census figures were not yet available.

Projected Population of Catchment		
Year	Actual	Actual Growth
2011	11,305	
2016	11,578	c. 0.5% growth per annum
	1% Growth Scenario	2% Growth Scenario
2022	12,290	13,039
2031	13,442	15,582

The calculation of per capita expenditure, in line with the 2016 study, is based on an extrapolation of the Metropolitan Cork Joint Retail Study, as outlined below:

Year	Per Capita Convenience Expenditure	Per Capita Comparison Expenditure
2011	€3876	€3641
2016	€3,993	€3,864
2022	€4,239	€4,614
2031	€4,636	€6,020

- based on a 1% per annum increase in convenience expenditure
- based on a 2% per annum increase in comparison expenditure between 2013 and 2016 and a 3% per annum increase between 2017 and 2031.

The total available expenditure for convenience and comparison goods can be determined by applying the per capita spending to the existing and projected population levels for the catchment area.



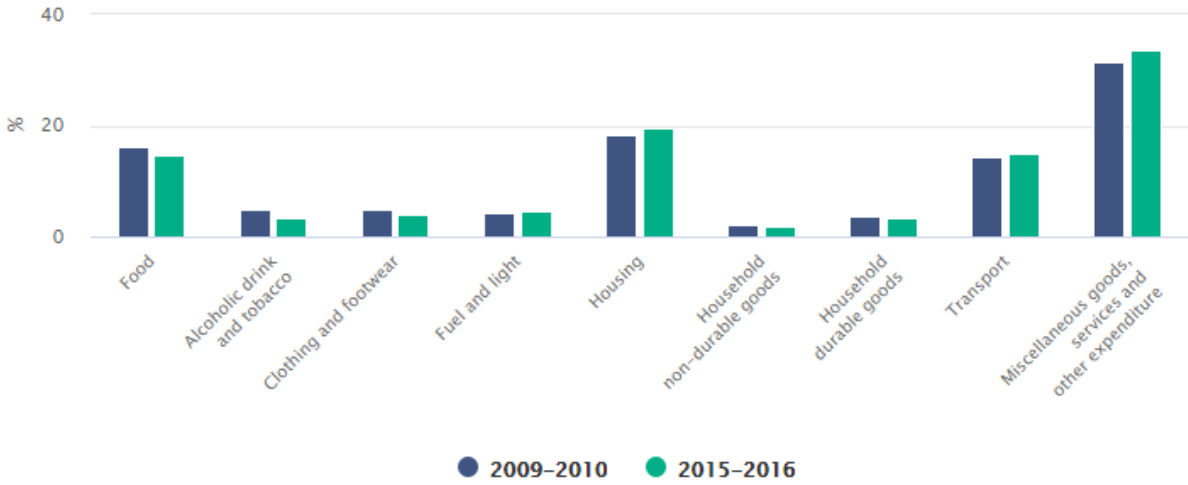


Per Capita Convenience Expenditure						
Year	Population Growth Scenario	Population	Estimated Convenience Expenditure (€m)	Estimated Comparison Expenditure (€m)	Residual Expenditure (€)	Identified Capacity (m²)
2016	Actual	11,578	46.2	44.7	11.2	1,018
2022	1%	12,290	52.1	56.7	17.1	1,554
2022	2%	13,039	55.3	60.2	20.3	1,845
2031	1%	13,442	62.3	80.9	27.3	2,481
2031	2%	15,582	72.2	93.8	37.2	3,381

The 2016 study estimated the existing retail turnover of the existing convenience stores in the catchment to be 35 million, which based on our updated figure leaves an available expenditure of €11.2 million in 2016 rising to between €27.3 and €37.2 in 2031. There are no comparison stores in the catchment, so it is assumed that in 2016 the €44.7 million is being spent elsewhere, it is estimated this figure will rise to between €80.9 and €93.9 million by 2031. These figures translate into identified convenience retail floorspace capacity of 1,018m² in 2016 rising to 3,381m² by 2031.

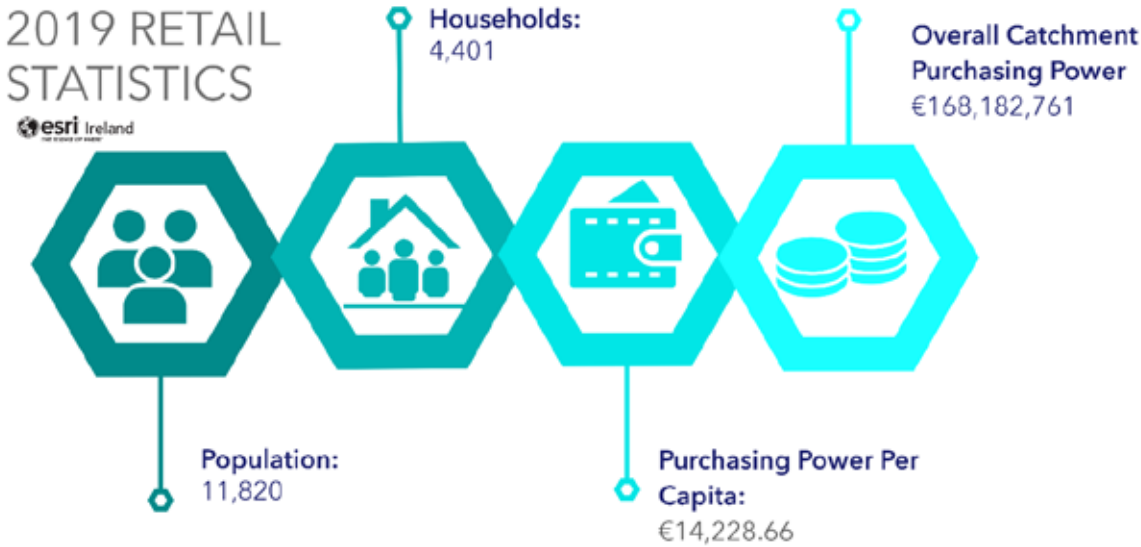
It should be noted that the CSO has recorded a slight decrease in the percentage of household expenditure allocated to convenience goods between 2009 -10 and 2015-16. However, we do not consider this trend significantly impacts on the overall figures.

Using ESRI Business Analyst software, the overall 2019 purchasing power for the catchment is calculated as €168 million based on MBR data. Again, this indicates that there is significant current available expenditure in the catchment to justify a significant expansion of retail floor space.



Source: CSO Ireland

2019 RETAIL STATISTICS





4.3.2 Support Existing Neighbourhood Centre

BMOR have acquired the Hollyhill Inn site within the neighbourhood centre and given the constraints of this site have also concluded that it is not possible to accommodate a second retail anchor at this location. However, they do wish to redevelop the site to complement the work done by Cork City Council and have recently developed proposals for a mixed use retail and residential scheme. Smaller retail units consisting of local services including a pharmacy are proposed and ground floor with specifically designed older people housing above. The initial proposals include provision for public upgrades at the junction of Courtown Drive and Harbour View Road.

As BMOR have a vested interest in the viability and vitality of existing Neighbourhood Centre they consider that any proposed District Centre should support and complement existing services and a strong synergy could be developed between both centres by promoting pedestrian permeability along Courtown Drive as detailed in Section 05..

BMOR intend to engage in pre-planning discussions with the Planning Authority regarding the proposed redevelopment of the Hollyhill Inn site when the proposals have been more fully developed.



Indicative Visualisations of BMOR Initial Proposals for Redevelopment of Hollyhill Inn Site- Prepared by Kiosk Architects



BMOR Initial Proposals for Redevelopment of Hollyhill Inn Site with Public Realm Improvements - Prepared by Kiosk Architects



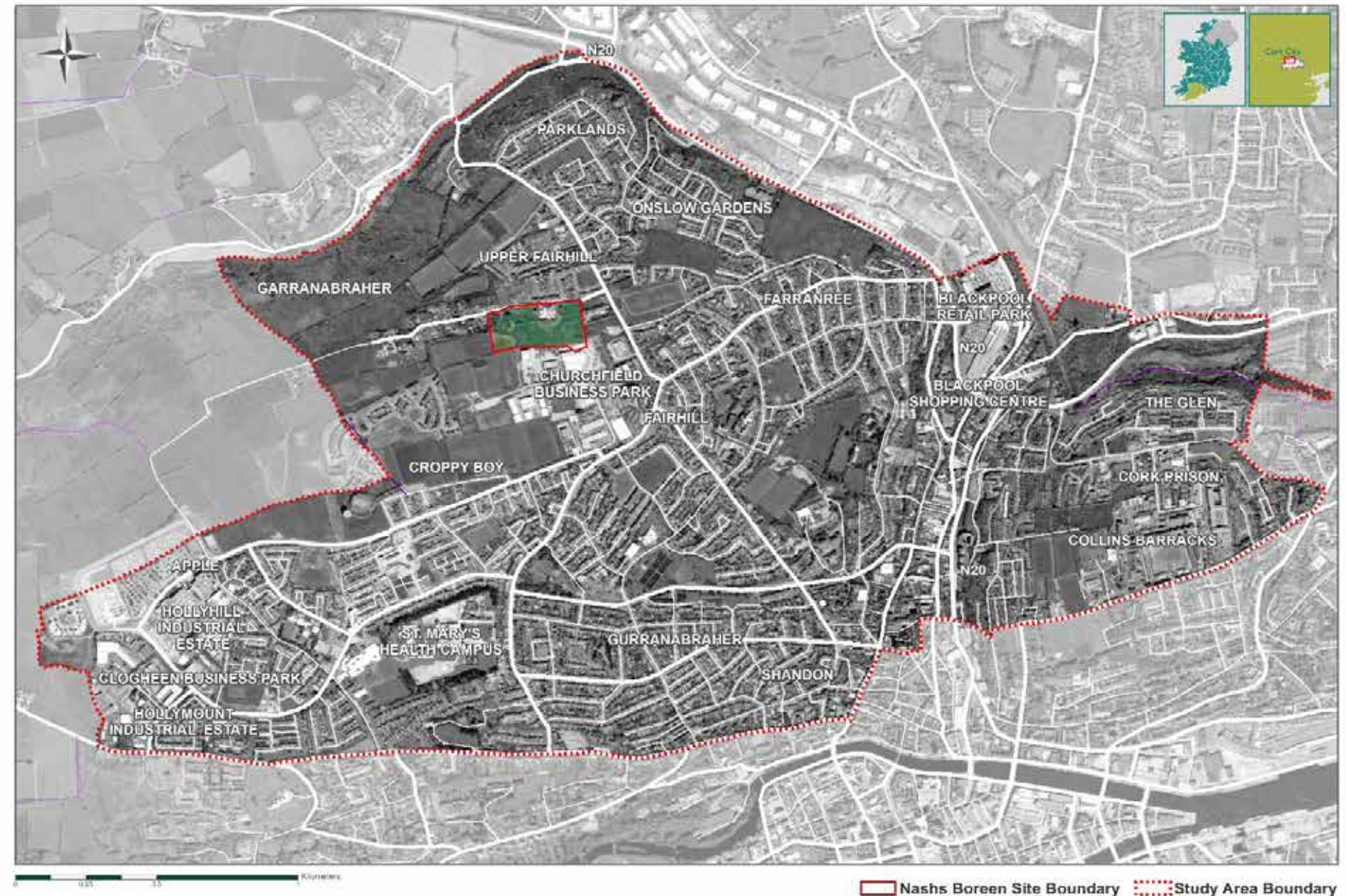
4.4 Employment

In 2018 HW Planning prepared the employment potential of the Nash's Boreen Area in general and a site in the ownership of Cork City Council in particular on behalf of Cork City Council. The area profile that underpinned the study considered a wider employment area than the study site and its adjoining neighborhoods. This employment catchment was defined having regard to the location of the site within the theoretical reach of a number of retail and employment centres: ranging from Hollyhill to the east to the Glen to the west, taking in Blackpool, Fairhill, Farranree and Shandon. It was also refined having regard to topography, physical barriers such as the River Lee, the road network (N20 other regional and local roads) and political and statistical boundaries such as Cork City Council boundary and the Census Small Area boundaries.

The resulting area equates to a significant proportion of the Northwest Suburb Quadrant: encompassing areas of the Cork City Northwest Regeneration Masterplan, the Knocknaheeny/Hollyhill Retail Capacity Study, the Blackpool Local Area Plan and the Farranferis Local Area Plan.

The study identified that there were 12,312 residents workers and 10,081 jobs in the catchment, equating to a worker to job ratio of 0.818 in the area. This is lower than the average worker to jobs ratio in Cork City and Suburbs (old boundary) of 1.17 and the Southern Regional Assembly Area of 1.06. This is surprisingly low given the presence of Apple's European Headquarters, employing 5,500 working in the area and other key employment hubs, including the District Centres at Blackpool and Hollyhill, Hollymount Industrial Estate, St. Mary's Hospital, Churchfield Industrial Estate, Shandon, Cork Prison and Collins' Barracks.

The North-west City area has undergone significant transformation over recent years arising from focused public sector investment, as well as the planning and implementation of private commercial projects. The Cork City Northwest Regeneration Masterplan (2011), has contributed towards this. It identifies early school leaving, long-term unemployment, single parenthood and other problems relating to health and well being as the underlying issues effecting the area. The Pobal HP Deprivation Index, included in the City Council's Issues Paper shows the area as predominantly "disadvantaged" and "very disadvantaged", with a pocket of "extremely disadvantaged". The City Development Plan recognised that social disadvantage is still spatially concentrated in certain parts of the city, with 3 of the 4 Revitalising Areas through Planning Investment and Development programme (RAPID) areas in the city located in the Northside. Two of these are entirely within the study area (Knocknaheeny, Churchfield and Fairhill, Gurranebraher and Farranree) as is part of the third RAPID area (Blackpool, Glen Mayfield).



— Nash's Boreen Site Boundary Study Area Boundary

¹ Hollyhill currently operates as a Neighbourhood Centre but has the potential to develop into a District Centre, primarily based on retailing and services

² Knocknaheeny/Hollyhill Retail Capacity Study, 2016, p1



NORTH-WEST CORK CITY IN NUMBERS - 2016 CENSUS INFORMATION

27,466



POPULATION IN NW CORK CITY

3.5% INCREASE SINCE 2011 (CORK CITY OVERALL INCREASED 5.4%)

ALMOST HALF



EDUCATION

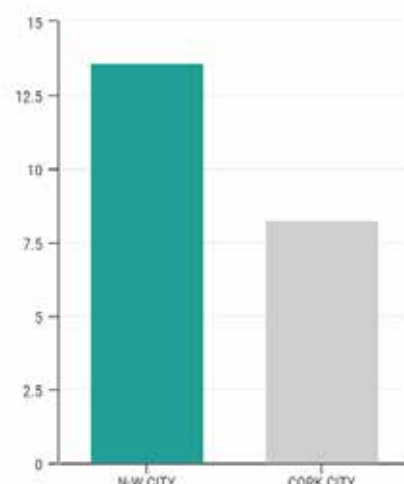
46% LEFT FORMAL EDUCATION BEFORE THE LEAVING CERT



LABOUR FORCE

35% OF WORKERS IN THE N-W CITY ARE MANUAL SKILLED, SEMI-SKILLED OR UNSKILLED, COMPARED TO 23% IN CORK CITY

UNEMPLOYED OR LOOKING FOR FIRST JOB



13.6% OF THE POPULATION IN N.W. CORK CITY ARE UNEMPLOYED OR LOOKING FOR THEIR FIRST JOB COMPARED TO 8.3% FOR THE CITY AS A WHOLE

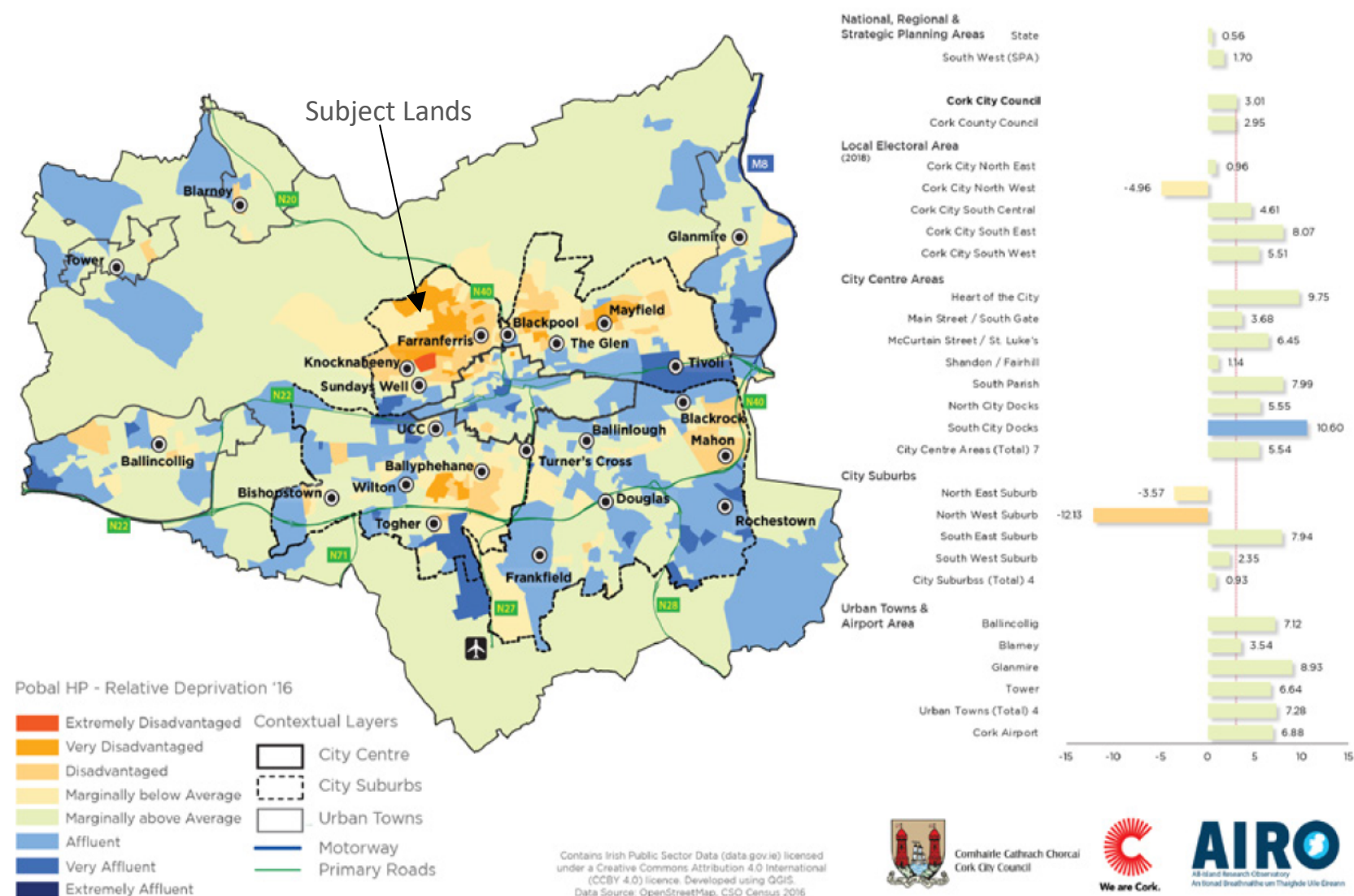


JOBS

THERE ARE 10,081 JOBS IN THE N-W CITY AND 12,312 RESIDENTS AT WORK OR UNEMPLOYED

Pobal HP Deprivation Index, Relative Score 2016

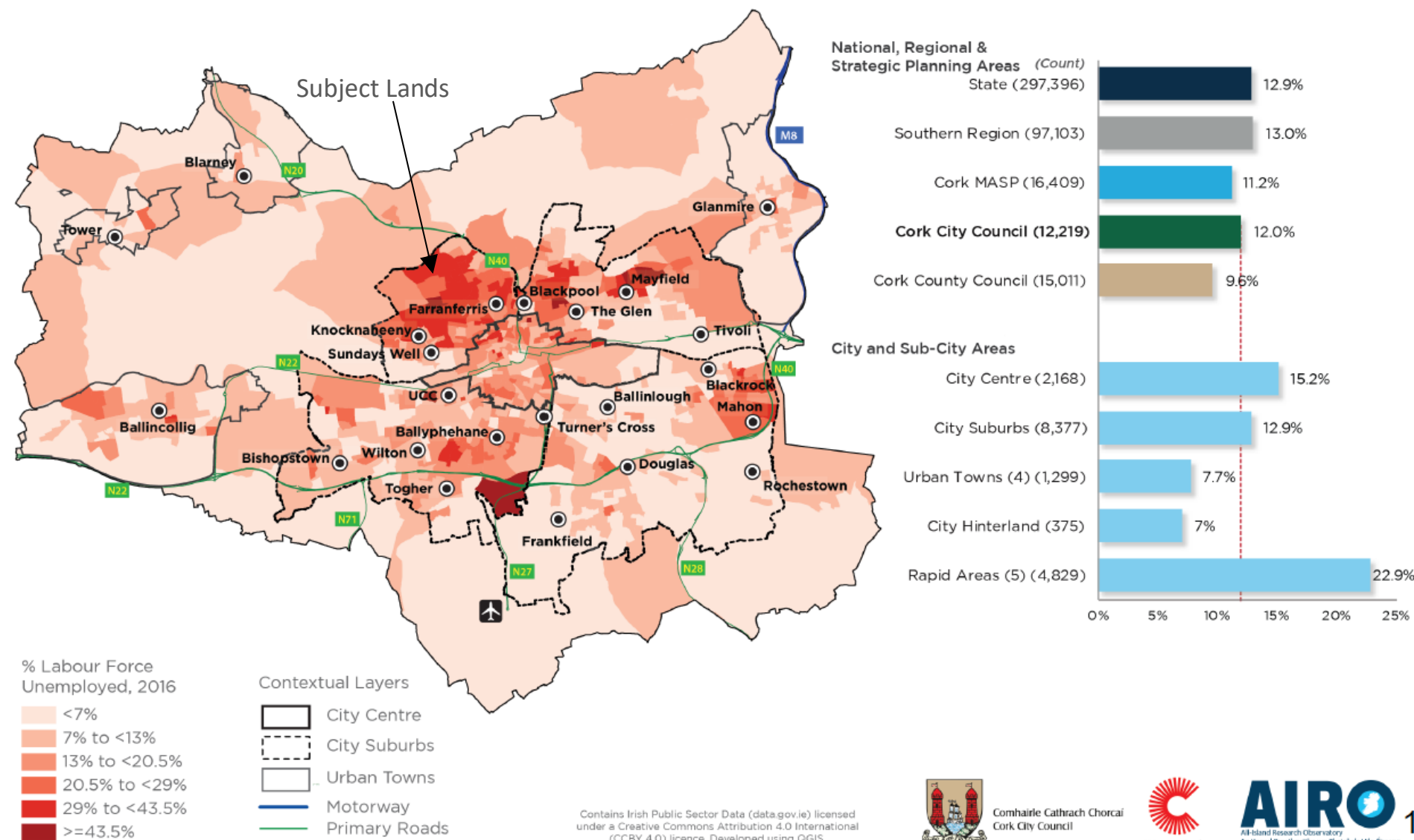
Cork City - Small Areas (SAs)





Labour Force Unemployed, 2016

Cork City - Small Areas (SAs)



While improvement have been achieved it is evident from the 2016 Census that unemployment rates in the area of 13.6% (unemployed and looking for 1st job) are still significantly higher than 8.3% for the city as a whole (Old Boundary).

There are two underlying issues at play here: firstly, as indicated earlier, the ratio of total jobs to resident workers is relatively low, so there are fewer jobs per resident worker in the area. In addition, there appears to be a mismatch between the educational requirements of a significant number of the jobs available within the N-W City area and the highest educational attainment level of the resident workers. While improvements have been achieved in relation to the education completion level within the area, it is still evident that in the 2016 census only 11% of the resident workers had completed third level education or higher (NFQ 7 - 10), whereas 49% of the people working in the area had.





This appears to indicate that these jobs are not being taken up by local workers but by workers live outside the catchment and who commute into the area. This mismatch in skills level is illustrated in the Issues Paper Labour Force Unemployment Map, which shows that unemployment is high in the Small Areas adjacent to the Apple Campus (between 41 – 50%), where 5,500 workers are employed. The Small Areas immediately to the south and east of the Nash's Boreen are experiencing relatively high unemployment levels of 31-40%.

It should also be noted that the resident workers in the study area are under-represented in the *'employers and managers and higher and lower professional'* categories compared to the rest of the city, and over represented in the *'manual skilled, semi-skilled and unskilled categories'*.

The sustainable development of the northwest suburb quadrant is intrinsically linked to the development of local employment that fits the profile of the resident workers in the area itself. While longer term objectives are in place to extend the education completion levels within the area, in the shorter term, the provision of local jobs that can tap into the existing skills base will assist in addressing the elevated unemployment levels in the area.

To achieve the employment growth targets for the city of 47,100 new jobs by 2031, a growth of 51%, better use must be made of the underutilised workforce in the northwest suburb quadrant. One of the strengths of the area is the relative youth of the population, which has disproportionately higher population numbers in the early school and pre-adolescent cohort than the rest of the city. This large young population, coupled with improved educational outcomes will result in the northwest suburb representing, in the medium term, a significant labour pool to fuel future economic development. In the short-term, it would appear that major nearby employers such as Apple are generally not providing employment in the local area. There is therefore a clear need to provide for an increased amount of employment opportunities similar of the type offered in the existing Churchfield Industrial estate. There are few if any other sites located in the northwest suburb quadrant that can accommodate this type of employment growth. The ambitious growth in population and employment as envisaged by the NPF for Cork City will need to be complimented by a comparable increase in appropriately zoned land for employment uses. Based on this, the accompanying masterplan proposes to expand the existing industrial zone.





Site Analysis

EXISTING EMPLOYMENT USE

The subject site adjoins several employment hubs, including Apple Operations Europe, a significant employment generator, employing 5,500 workers. In addition, employment hubs include district centres at Blackpool and Hollyhill, Hollymount Industrial Estate, Churchfield Industrial Estate and St. Marys Health Campus.

The Churchfield Industrial Estate shares a long boundary with the subject site. The quality of the buildings and the public realm within the industrial estate is low, and there may be opportunity within the study area to improve its connectivity, boundary conditions, and to provide for complementary uses of adjoining lands.

Apple Campus, with c. 5000 employees. Most employees are well educated, and commute to the location, rather than living locally.



Apple Campus, with contemporary office buildings and landscaped campus

Apple Campus, with c. 5000 employees

Hollymount Industrial Estate

Significant level change along northern edge of industrial estate may be mitigated by a landscaped buffer zone

Hollyhill Neighbourhood Centre

CityNorth College of Further Education

St. Marys Health Campus

Existing light industry zone, with irregular shape and poor quality public realm. Traffic and Noise issues may impact on neighbouring uses. Light industrial uses offer local employment opportunities, and some of these industries may wish to expand their current operations.

Churchfield Industrial Estate



Churchfield Industrial Estate, with industrial buildings, and poor quality public realm



Churchfield Industrial Estate, viewed from Fair Hill, where the industrial use adjoins existing two storey housing.