



Cruise Shipping and Urban Development

The Case of Dublin



Case-Specific Policy Analysis

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Case-Specific Policy Analysis Reports

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Executive summary

What we did

This study aims to assess the impacts of cruise shipping on urban development in the case of the city of Dublin, Ireland. It was carried out as part of a programme on Cruise Shipping and Urban Development at the International Transport Forum (ITF) at the OECD and benefits from a study visit to Dublin and a series of interviews conducted with relevant stakeholders.

What we found

Dublin has been growing as an important port of call for cruises in Northern Europe over the last decade. From just over 30 000 passengers in 2003, Dublin hosted close to 149 000 cruise passengers in 2015, which makes it the largest cruise port in Ireland, but much smaller than its main competitor, Southampton, who had over 11 times more cruise passengers in 2015. Cruise passengers now represent 7 to 8% of total number of tourists coming to Dublin, a share that has increased rapidly over the last decade.

Cruise tourism generates significant economic benefits for the city of Dublin. As a port of call, Dublin receives thousands of extra daily tourists during the cruise season. These cruise tourists tend to spend an average EUR 100 per passenger per day, according to the Irish Tourism Agency. Land tourists spend a similar amount, but including accommodation. Their impact in Dublin is perceived particularly in the tourism, hospitality and retail sectors whereby some beneficiaries develop strategies to maximise the outcome of their presence.

The value cruise tourism brings could be further increased by developing Dublin into a cruise home port, i.e. a port from which cruises start and where they end, also called turnaround calls. Home porting generally generates larger local economic value, because it is a way to tie passengers to the city before or after the cruise voyage. Dublin currently has few turnaround calls but has some significant assets that could be used to increase the current number. In particular, it benefits from a well-connected international airport with fast transport connections to the port. One of the main constraints for developing home porting is the limited amount of Irish residents that go on a cruise in Ireland and the current lack of a dedicated cruise terminal in Dublin.

The potential for Dublin to become a home port will be boosted by the planned dedicated cruise berths at the port. The Alexandra Basin Redevelopment (ABR) project proposes three dedicated cruise berths closer to the city, which will make Dublin Port much more attractive and safer for passengers. The planning permission for the ABR project, received July 2015, will allow the port to go ahead with investments for this upgrade.

For Dublin to fully realise the potential for home porting, a cruise terminal building would be needed. The ABR project does not foresee a dedicated cruise terminal building, whereas this would arguably increase the probability of Dublin to develop more home porting activity. Given the seasonality of cruise tourism in the city, a flexible multi-purpose building structure might make most sense. Cruise shipping impacts are characterised by split incentives: The benefits flow to economic actors within the

city, whereas most of the costs are incurred by the port. This is all the more the case for turnaround calls; for this reason partnerships would be needed with the city, the transport ministry and private actors that might reap benefits from cruise turnaround calls, in order to find creative solutions to finance a cruise terminal building.

More generally, Dublin would benefit from an overarching cruise strategy. Such a strategy would need to define strategic orientations with regards to cruise shipping, including the ambition with respect to turnaround calls and could cement a partnership with respect to the financing of cruise terminal building structures. As part of the strategy, improvement of the connectivity of the new cruise terminal to the city would need to be prioritised, as well as sustaining joint communication between Dublin Port Company and Dublin City Council to attract more cruise passengers to Dublin, not in the least Irish residents that have thus far tended to go on cruise voyages outside Ireland.

What we recommend

Implement the Alexandra Basin Redevelopment Project

This project will provide new berths for cruise shipping. Developing more adapted infrastructure for cruise ships and passengers is the primary concern to improve Dublin's success as a cruise port. Now that the approval from the national planning authority has been granted, implementation could go ahead at full speed.

Develop a joint cruise strategy for the whole city

Such a strategy should include all relevant stakeholders in a partnership between port, city, transport ministry and local business associations. As part of such a strategy Cruise Dublin could be promoted through joint marketing and communication of Dublin as a cruise destination. This should involve actors, such as the port, city, Tourism Ireland, associations and the relevant ministries.

Better exploit Dublin's asset as potential home port

In order to increase local economic impacts of cruise shipping, Dublin's assets as a potential cruise home port could be leveraged and the facilities needed for realising such an ambition provided. These could include a cruise terminal building structure. Given the potential beneficiaries of the cruise home porting, the city and local businesses should be involved in providing and financing of such facility, in partnership with the port and possibly other actors.

Resolve constraints related to cruise passenger flows

Ways to resolve such constraints include more parking spots for coaches and planning to ease passenger traffic flows between the new cruise terminal and the city centre. Other than dedicated bus lanes already in place, this could include adaptations to smooth pedestrian flows as well as the extension of the Luas line into the cruise terminal. The ambition should be to have these measures implemented when the new cruise terminal becomes operational.

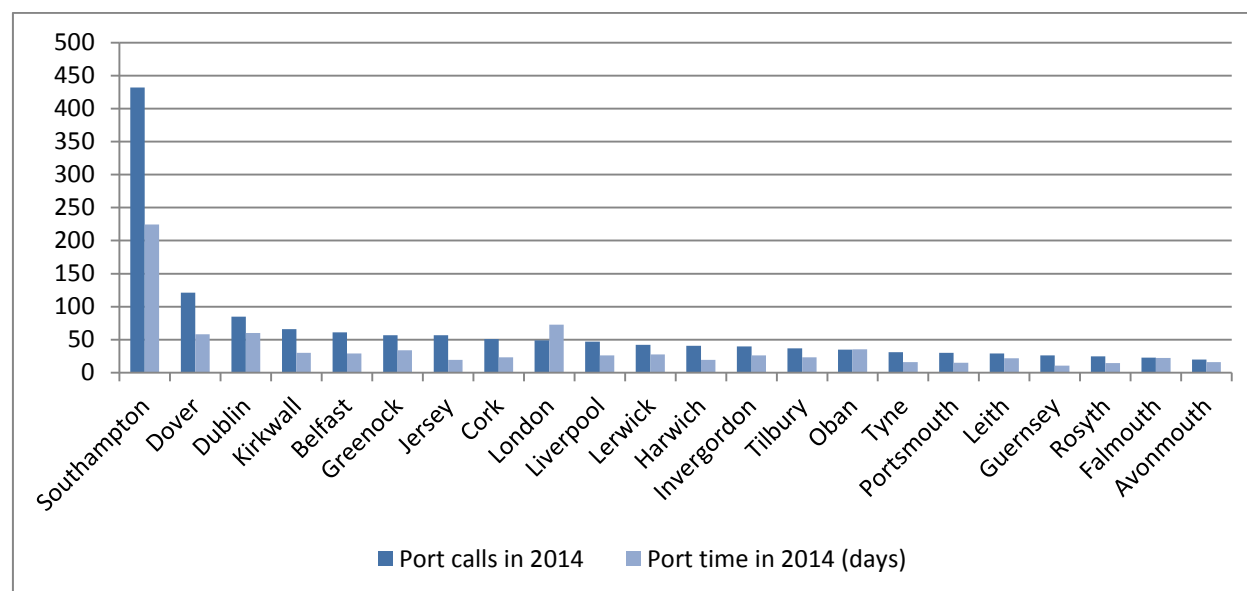
Develop a green cruise port policy

This could start with a systematic monitoring of environmental impacts of cruise ships, including air emissions, to be extended with mitigation measures, such as incentive schemes for cleaner cruise ships, e.g. ships using low sulphur fuels or applying alternative measures.

Dublin as a cruise port

Dublin is the most important cruise port in Ireland. According to Dublin Port Company, it had 93 calls from cruise ships in 2015, which brought in total 148 891 passengers without counting the crew included. In 2016, 100 ships will be calling the port. These numbers make Dublin a larger cruise port than other Irish ports, such as Cork that had 54 calls and 138 000 passengers (including crew) in 2014. In terms of cruise ship calls, Dublin is also more important than most UK ports; only Southampton and Dover had more cruise port calls in 2014 (Figure 1). The position of Southampton is very dominant, with around five times more cruise calls than Dublin. From a European perspective, Dublin could be considered a medium-sized cruise port. Among the 426 European cruise ports that we have identified in our cruise port database, Dublin is ranked number 63 in terms of number of cruise ship calls in 2014.

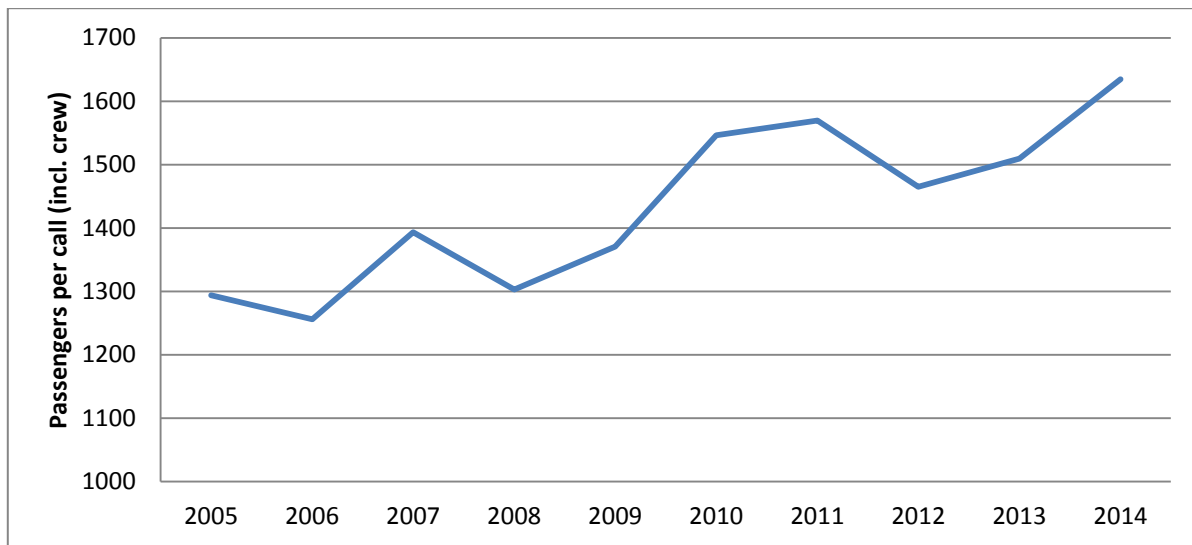
Figure 1. Largest cruise ports in the United Kingdom and Ireland (2014)



Source: Own elaborations based on data from Lloyds Intelligence Unit.

Cruise shipping is a substantial and rapidly growing part of the tourist numbers to Dublin. In 2013, their share of cruise passengers was approximately 4.6% of total tourists coming to Dublin. The number of cruise tourists has risen sharply over the last decade, with passenger volumes almost tripling in size, from around 32 000 passengers in 2004 to 97 316 in 2014, much quicker than the increase of general tourists to Dublin over the same period. The growth rate of cruise passengers in Dublin is comparable to the growth rate of Southampton over the same period, but substantially higher than the growth rate of Dover, which was approximately 60% growth over the same decade, according to numbers from Cruise Industry News (2014). Although the number of cruise calls has increased over the last decade, it is at a much slower pace than the passenger increases, reflecting the development of increased ship size in the cruise industry. As a result, the number of passengers per cruise ship call has risen steadily over the last decade (Figure 2).

Figure 2. Average number of passengers per cruise ship call in Dublin (2005-2014)



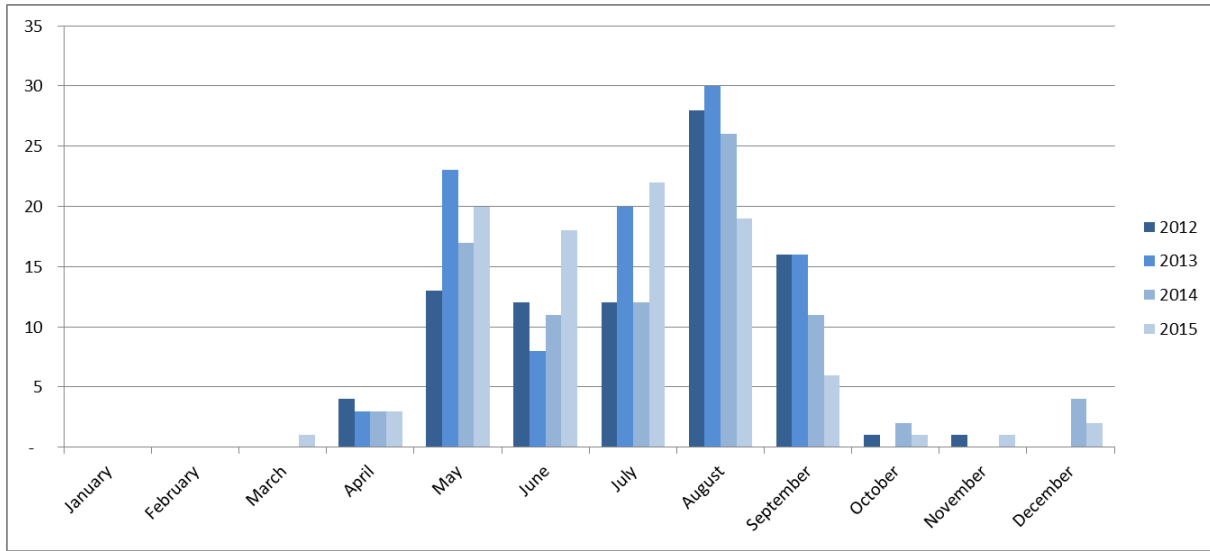
Source: Own elaborations based on data provided by Dublin Port Company.

Despite these growth rates, cruise shipping still plays a fairly marginal role in the port of Dublin, which is predominantly a cargo port. This can be illustrated by the number of cruise ship calls which represents only 1.2% of the total ship calls to the port of Dublin. Total cargo volume handled in the port of Dublin was 31 million tonnes, half of which was Roll-on/Roll-off (Ro/Ro) traffic. Passenger transport in the port of Dublin is mostly provided via ferry services, with passenger numbers amounting to 1.5 million in 2014, more than ten times higher than the cruise passenger numbers.

The cruise tourism season in Dublin runs mostly from April to September, with around half of the cruise calls concentrated in only two months (Figure 3). As a result of the seasonal nature of cruise shipping in Dublin, there are long periods in which the port is not used for cruise activities, whereas at peak seasons several berths might be needed for cruise ships. In 2014, there were 18 days with two or more cruise ships at berth, three of which with three ships at the same time and once with four ships berthing simultaneously. The seasonal nature of cruise shipping in Dublin also has an impact on the way the city needs to deal with the large amounts of tourists; cruise tourism high season coincides with the regular tourism high season. The seasonal nature is changing at the margins: while there was no call in winter only a few years ago, there were four cruise ships calls in December 2014 in Dublin. There are possibilities to market the city as an all-year destination, capitalising on events like Christmas and the related shopping activity. Some of these are developing in Northern Europe, similar to Aida creating a new year round seven-day cruise starting from Hamburg. The trend is also growing in Dublin, with more and more calls around Christmas and New Years and the emergence of a few calls every month of the year (Figure 3).

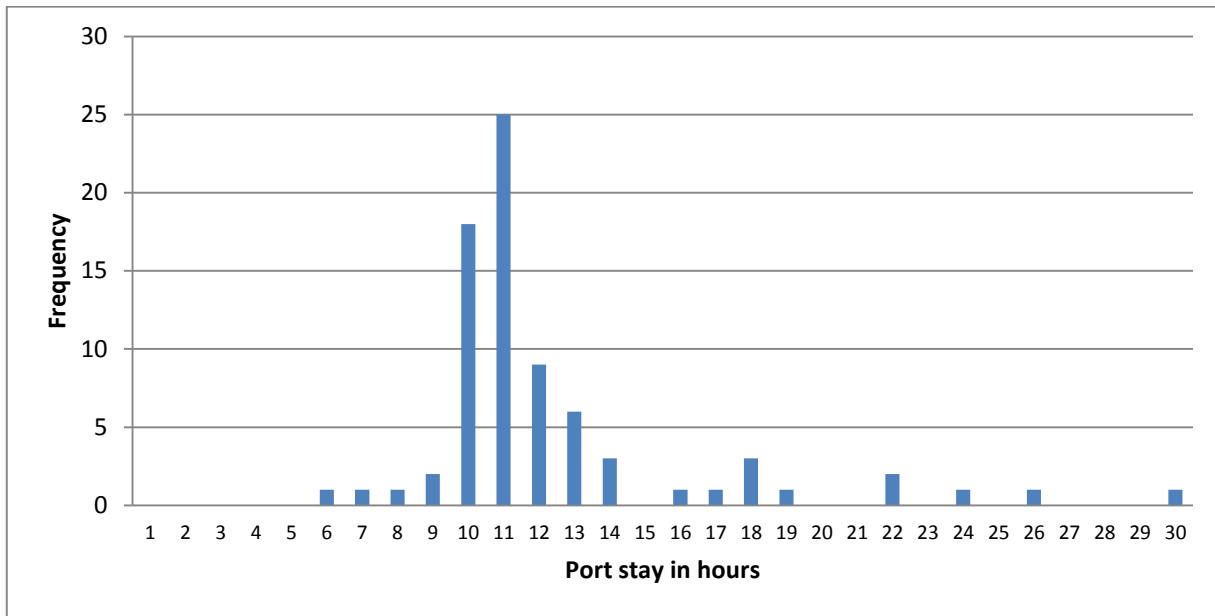
Dublin is to a very large extent a transit port for cruise shipping: representing 90% of the calls and 93% of the cruise passengers to Dublin in 2012. This means that Dublin is hardly used as a turnaround port (i.e. ports where cruise voyages start and/or end). As a transit port, Dublin is integrated within itineraries as one of the ports where the ship will stop in the morning and leave at night, bringing tourists in the city for the day. Analysis shows that three-fourths of all cruise ships to Dublin in 2014 stayed in port between 10 to 14 hours (Figure 4).¹

Figure 3. Cruise calls to Dublin per month (2012-2015)



Source: Own elaboration based on data provided by Dublin Port Company.

Figure 4. Cruise port stay time in Dublin (2014)

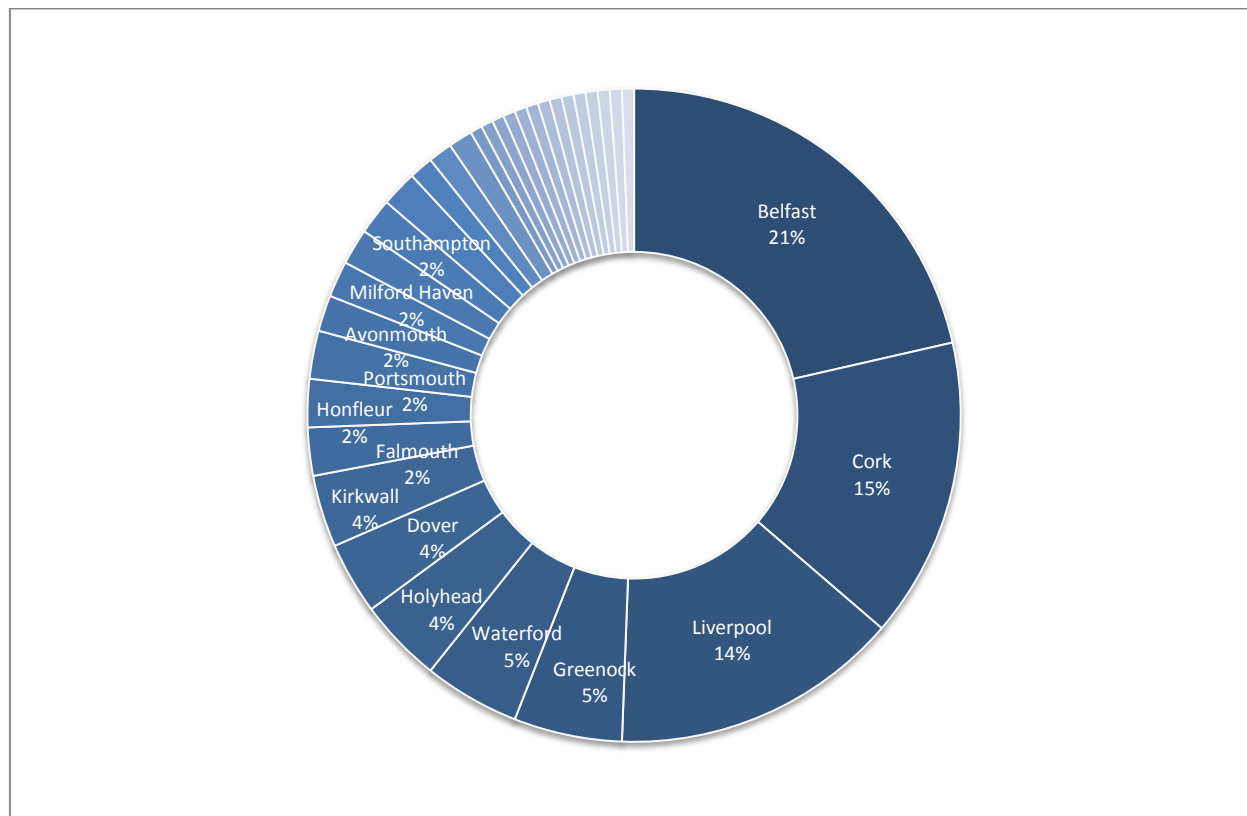


Source: Own elaborations based on data from Lloyds Intelligence Unit.

Dublin is included in Northern European and Baltic Sea cruise itineraries. Most of the cruise traffic to Dublin is generated by itineraries within the British Isles which represented almost three-fifths of cruise calls and passengers to Dublin in 2012, according to Bermello et al. (2012). Dublin’s strong dependence on cruise itineraries within the British Isles can also be illustrated by an analysis of their direct cruise connections with other cruise ports, that is: the ports that are called immediately prior to and after the cruise port call to Dublin. Analysis of the cruise ship calls in 2014 show that half of these are

with a connecting call to only three ports: Belfast, Cork and Liverpool (Figure 5). The number of direct connections with ports other than Irish or British ones, is very occasional and limited to a few ports, such as Honfleur, both in France.

Figure 5. **Ports called immediately prior to or after a cruise port call to Dublin (2014)**



Source: Own elaborations based on data from Lloyds Intelligence Unit.

There is a large variety of cruise lines that calls the port of Dublin. In 2012, less than half of the calls were covered by three lines: Princess (32%), P&O (10%) and MSC (7%) (Bermello, Ajamil and Partners Inc., 2012). This provides Dublin with a more diversified offer than various other cruise ports. This could be considered both an advantage and a disadvantage. An advantage because this means that Dublin is less dependent on one cruise line or brand; a disadvantage because there is no cruise line that seems fully committed to bringing a lot of passengers to Dublin.

Three-quarters of the cruise passengers to Ireland come from three nations: USA (37%), UK (26%) and Germany (12%), and the remainder consist of other Europeans (Fáilte Ireland, 2012). Asian tourists also increasingly take part in cruises, but do not show up in the statistics in a significant manner. People over 60 years old represent 55% of cruise passengers to Ireland, and one out of five passengers is under 44 years (Fáilte Ireland, 2012). Most of the cruise passengers to Ireland (86%) are return visitors. Revealingly, these data are only available at a national level, not per cruise port in Ireland; so we have to assume that the cruise passenger to Dublin is in line with the profile of the cruise passenger coming to Ireland.

Dublin currently does not have a dedicated cruise terminal; cruise ships berth at cargo terminals. Two of those terminals are located in the middle of the working port, mainly handling containers,

Roll-on/Roll-off (Ro/Ro) and Lift-on/lift-off traffic (Lo/Lo), but also dry bulk and products like animal feed. There is another one called berth 18 - located close to the city centre on the west side of the port - which provides better conditions for cruise passengers. There are no other passenger-related activities on the terminals where cruise ships currently berth.

This environment is challenging for cruise lines and passengers despite the port's efforts to clean up the areas and contain passengers when cruise ships are present. The current berth options limit the size of ships that the port can accommodate to 330 metres. The largest cruise ships cannot berth at the port which is a competitive disadvantage for Dublin. The current draft of the fairway (7.8 metres) is also restrictive. Even though cruise vessels are not the deepest ships, the draft is insufficient for the largest ones on the market as of today. The largest cruise ship that has called the port of Dublin so far was the MSC Splendida in 2015, at 333 metres long. The operation was successful due to simulation efforts and the reversing of the ship prior to its entry into the port channel. In comparison, the Allure of the Seas, the largest ship in the world, has a length of 360 metres and draft of 9.1 metres. The port will have a new turning circle by 2019, however, which will allow very large ships to access the future cruise berths.

Traffic impacts

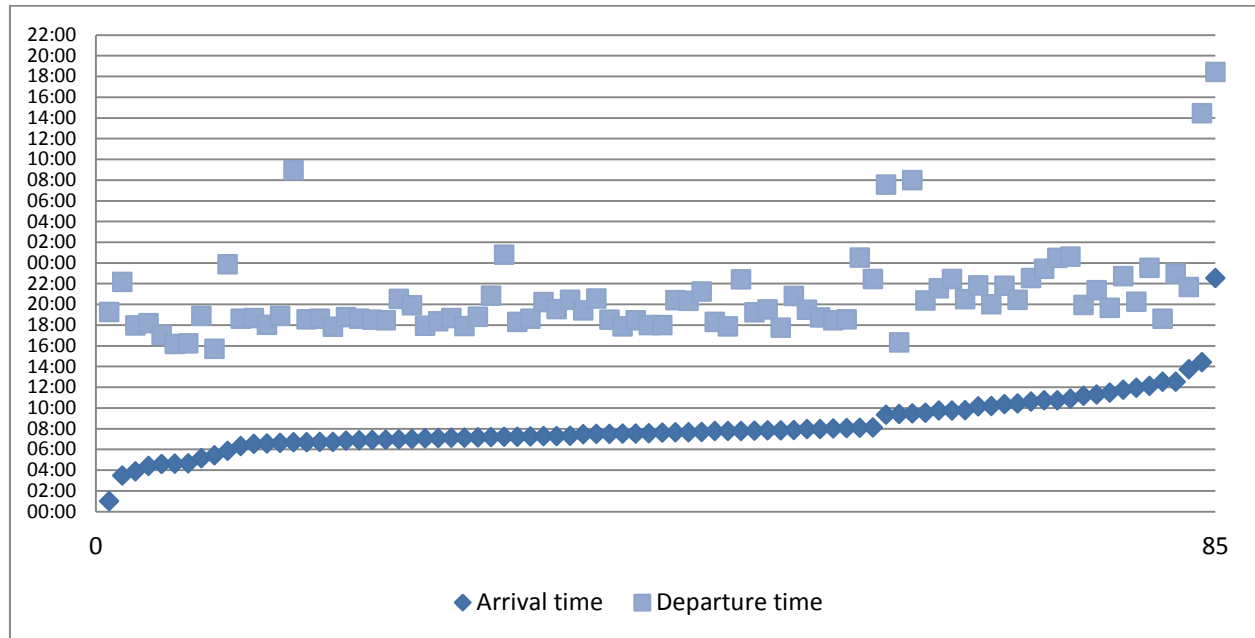
Transportation of cruise passengers is one of the large challenges related to cruise tourism in the city of Dublin. The city centre suffers from significant congestion and especially on major axes like the quays. The daily traffic of commuters is already very dense, especially at peak hours. The morning peak hours seem to coincide with the arrival times of most cruise ships to Dublin: more than half of the cruise ships calling in Dublin arrive between 6:30 and 8:00. These calls are likely to generate coach traffic that intermingles with the regular urban congestion. The other cruise ship calls were at relatively more off-peak hours. In terms of ship departures, the overall picture is less concentrated: 40% of the cruise ship departures in 2014 were between 17:00 and 19:00, but the majority of the departures were later, so one can assume that the traffic impacts from departing cruise passengers are less coherently coinciding with urban traffic flows.

Because of the lack of space, there is also a lack of available parking and drop-off areas for coaches. On relatively large cruise ships, around 50-60% of passengers have pre-booked an excursion which means that over 1 500 passengers could be moved around the city (or its surroundings) during the day. This is multiplied when there are several ships at the same time. For each ship there are a number of coaches responsible of picking up and dropping off the passengers on the various sites of their tours. There are no particular issues with picking up at the port but there is no designated space in the city where coaches can drop off passengers (which can take a significant amount of time since passengers are generally elderly and buses have a capacity of around 75 passengers) and wait to take them to the next location. Three simultaneous cruise calls in Dublin Port stretch the tolerability of related coach traffic in the city centre. The city council is currently looking at a location on the north side of the city centre, an area that would be dedicated to cruise coaches, but also to other types of excursion coaches and city public buses, which should be effective in 2016.

It is currently challenging to use other means of transport than coaches. Currently there is no good access to the city as the terminals are situated deep within the working ports. The walk from there to the Luas tram – the tram line that connects the Docklands to the city centre – is long and not pedestrian friendly: the main access to the port comprises rail lines and is full of heavy-load trucks. The exit of the port is a major axis with four to five lanes and there are few traffic lights (East-Link). A larger choice of transport options for cruise passengers could also have positive economic effects, as it might increase the share of passengers that go out to the city on their own and spend money there. As will be explained in the following section, the creation of a dedicated cruise terminal near the city provides opportunities to

improve the connectivity, e.g. by extending the tram line that currently has its terminus close to where the cruise berths are planned to be installed.

Figure 6. Arrival and departure times of the cruise ships to Dublin (2014)



Source: Own elaborations based on data from Lloyds Intelligence Unit.

What drives the competitiveness of cruise ports?

There is a fairly extensive body of academic literature on the competitiveness of cruise ports. One of the first studies on cruise port competitiveness was Marti (1990). Based on a literature review from trade journals, he established a ports typology differentiating ports of calls, home ports and all-purpose ports and setting out their general characteristics. He also set out the differences between the “site” factors and the “situation” factors. Both comprise a physical dimension, but “site” relates to infrastructure, superstructure and services available at the port, whereas “situation” refers to attractions around the port, the sea, land and air connections, which are elements the cruise port benefits from but that are not its doing. Situation factors can evolve for political, cultural or economic reasons. These distinctions between ports, site and situation elements and their importance for cruise lines when they choose ports was later extended by McCalla (1998). He analysed information communicated at Seatrade Miami to weigh the importance of site and situation in the communication of ports and established that the situation factors were a more dominant factor in explaining the success of cruise ports. That is, it is more important that a port is located within a cruise region, in an area for which demand is high. If it is not the case, the port will not attract cruise lines solely with appropriate infrastructure. Site elements such as infrastructure, services range and quality can always be created and improved upon by a port but are not the prime determinants.

Other authors took slightly different perspectives. Gui and Paolo Russo (2011) applied the Global Value Chain (GVC) approach to the cruise industry in order to introduce a framework for the analysis of connections between the global structure of the cruise value chain and the local structure of land-based cruise services and related local economies. The GVC framework helps to envision how global industries are organised by examining the structure and dynamics between different actors involved in a given

industry. When looking at relationships between ports and cruise lines they find that what matters most to cruise lines are port charges and quality, the tourist experience, and security, which implies a wide range of infrastructures and services. Corres and Papachristou (2011) conducted a theoretical analysis of the relationships between ports in cruise shipping and attempted to provide some sort of cruise guide for cruise designers, listing out the different factors that are taken into account by cruise lines when they define their products and itineraries, such as time, space, profitability, services, etc. Some others focused particularly on some type of cruise ports. Lekakou, Pallis and Vaggelas (2009) defined determinants of competitiveness of cruise home ports based on a literature study and then submitted the list to industry professionals whom each ranked the criteria per order of importance. Baird (1997) looked at what it takes to be competitive as a port of call by taking Leith in Scotland as a case study. Busby and O’Neill (2013) tried to assess port of calls selection process by cruise lines. A recent ITF paper provides a synthesis of these various studies (Pallis, 2015).

Although these studies have their differences, they have certain common threads that make it possible to derive an overview of main determinants for cruise port competitiveness. A commonality of all studies is the central role they assign to cruise lines as the main actor deciding on cruise port calls, evidently based on their perception of clients’ demands. An important element that stands out is the fact that location matters and that port site and infrastructure in itself is not enough to attract cruise lines. Location of the port within a wider area attractive to cruising is essential and ports rely on other ports to work as cruise ports. They need to compete at the same time as it can be in their interest to co-operate and market themselves together. Taken as a whole, these studies define a list of top criteria for each type of cruise port (see Table 1).

Table 1. **Essential criteria for cruise transit and home ports**

Transit port	Home port
<ul style="list-style-type: none"> • Proximity to other cruise ports • Attractiveness of city and/or region • Port site and accessibility for cruise ships • Proximity to the city centre and available transport options • Port facilities and services offers for ships, crew and passengers • Competitive port fees • Clean, safe and comfortable terminals, preferably passenger-dedicated • Physical capacity of the port and the city to host large number of passengers 	<ul style="list-style-type: none"> • All elements needed for ports of call (lesser importance of the attractiveness criteria) • Close to other attractive cruise ports • Extensive services for passengers, crew and ships • Great air and/or road, and/or train connections • Very efficient services and facilities to operate turnarounds • Logistics and provisioning services

Source: Own elaboration.

Transit ports are ports where ships call, but where passengers do not start or end their cruise. This generally means that cruise ships arrive in the morning and depart in the evening, allowing its passengers time to visit the city in the meantime. Cruise transit ports are dependent on the presence of other interesting locations within short to intermediary distance. One of the main determinants for the attractiveness of ports of call is the attractiveness of the destination. Cruise clients often decide on a cruise based on the attractiveness of the destinations, cruise lines seek to include several of such “marquee” ports in their itinerary. Marquee ports are destinations that present cultural, historical, religious, or heritage value or other types of major attractions. Venice and Barcelona are examples of

marquee ports. A cruise port is more attractive if it happens to be located in proximity to other cruise ports in a cruise area, so that cruise lines can come up with attractive itineraries. Another determinant of cruise port attractiveness is that ships can berth in close proximity to the city centre to minimise transport time and provide passengers with attractive views on the city. It is considered an advantage if the port has appropriate berths; when these are absent passengers need to be transported to land by small boats (tenders), which adds logistical complexity and less ease for cruise passengers. Ports are more attractive to cruise passengers if the area where passengers disembark the ship is clean and safe, ideally dedicated to passenger activities with enough capacity to handle at the same time a large number of passengers (potentially several thousands of them). Services such as shops, food and beverage, information points provide additional advantages. Finally cruise lines also expect attractive fees from ports since they try to minimise their costs.

A home port is a port where passengers start or end their cruise; it is also called a turnaround port. It implies that ships arrive to disembark and embark passengers. Disembarkation and embarkation are usually done within the same day so the port needs to provide very efficient logistics and passenger facilities. The port and region have to offer attractive logistics for provisioning ships and ideally other services to ships like repairs. A home port must be well located to provide a starting and end point for itineraries. Being in close proximity to or very attractive for a particular source market is crucial to serve as a home port. It is essential that a home port is very well connected to a wide international flight offer and that the airport is located in close proximity to the port. Depending on its source market, it will also matter a lot that the port is easily reachable by train or by car (with available parking space). It is better if the home port is also an attractive destination for passengers but it is less crucial criteria for a port of call. The port is more attractive as a home port if it has an appealing and well-organised terminal building, so that it simultaneously processed people leaving the ship and those arriving. This implies the presence of a number of passenger services such as baggage handling, security checks, customs, waiting areas, shops, food and beverage. Space and services for ships' crew adds to the attractiveness. Without such facility it is much harder to satisfy both the passengers and the cruise line. The building could be designed as a multi-functional building if cruise tourism is seasonal, so that it can have year-round utilisation.

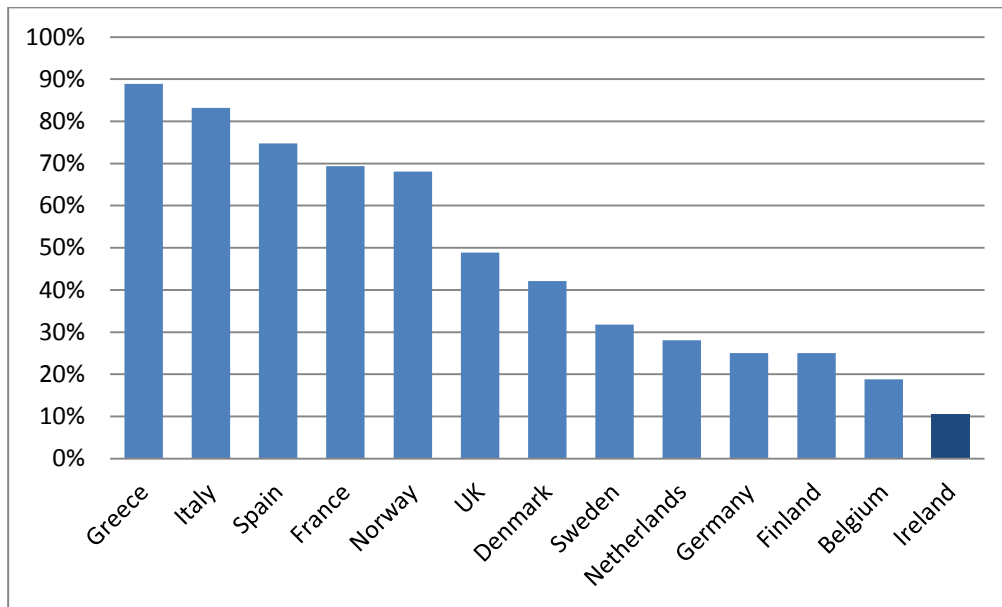
How competitive is Dublin as a cruise port?

Dublin is an interesting destination for cruise lines, as it is located close to other attractive destinations in Ireland, Scotland, Wales and England. The attractiveness of Ireland shows well in passenger interviews: for almost half of the passengers, Ireland as a destination of the itinerary was very important in the choice of cruise package, in particular for American tourists (Fáilte Ireland, 2012). Within Ireland, Dublin is considered as a marquee destination since it offers a wide range of cultural attractions. Within a short distance from the city centre, one can find luxuriant country side and heritage sites, such as Glendalough, Wicklow Mountains or The Boyne Valley.

The most important challenge to Dublin Port is the current lack of a dedicated cruise berth. This provides a non-adapted environment for cruises that arrive at the working port. The current berths convey a good capacity in terms of length and depth but the world's largest ships are not able to call because of depth restrictions. This is especially true the closer the ship wants to get to the city. Dublin port is located fairly close to the city centre, but is not well connected to it mainly due to the fact that ships currently call in the working port that is an enclosed area under the International Ship and Port Facility Security (ISPS) regulations. This makes it more complicated for taxis and coaches to get access to the cruise passengers, despite the fact that space is available at the main terminal. It offers parking capacity for around 50 coaches, and seven to nine taxis at a time. Still, there is no direct public transport link to the terminals where cruise ships berth, apart from one public bus that goes around the port. Cruise lines generally do not support such services since they compete with their own excursion offers. Going by foot

to the city centre is not an easy option either. This however will change when the new cruise berths open since the Luas train will be located only 150 metres away. Port facilities and services are currently limited for passengers and crew since no dedicated superstructure is available at the port, given that terminals are used for cargo the rest of the time. Excursion companies and the port make considerable efforts to welcome passengers and ensure a pleasant stay even if the context is not optimal for cruise ships. However, these situations will change in the near future thanks to the port’s redevelopment project, outlined in more detail in the section on Policies and governance.

Figure 7. The share of each nation’s cruise passengers that went to “local” destinations (2013)



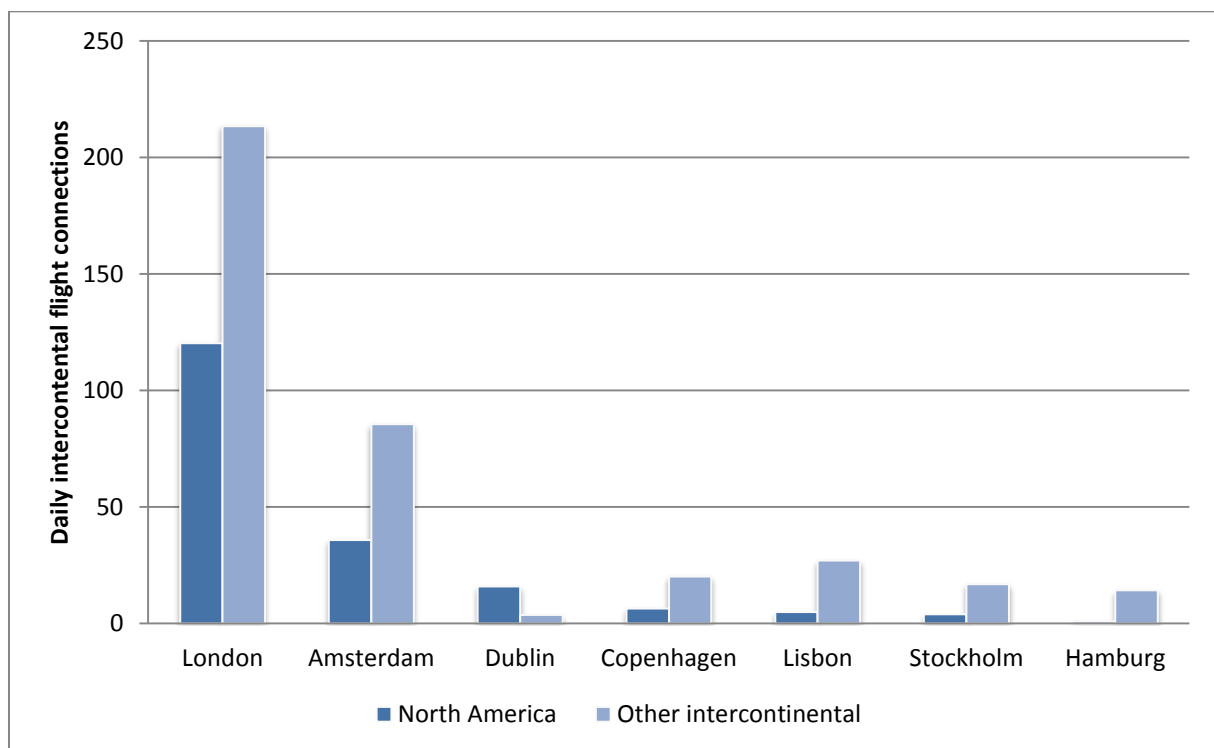
Source: Own elaborations based on data from CLIA, 2014.

The main obstacle for Dublin to develop as a cruise home port is the lack of interest of Irish passengers to go on a domestic cruise. Irish cruise passengers hardly use Dublin, or any other Irish cruise port for that matter. The cruise penetration rate in Ireland was 1.3% in 2010, which was almost half of the rate of the UK, the European leader in this respect. However, the rate was not far behind other European countries with high cruise penetration rates, such as Germany and Italy, and was far ahead of many other European countries, including France, Denmark and the Netherlands (CLIA, 2012). According to CLIA, there were approximately 35 000 Irish cruise passengers in 2013, but 77% of the Irish cruise passengers go to the Mediterranean and the Caribbean; only 3% to the UK/West Europe, the main itinerary in which Irish ports are included (CLIA, 2014). This is strikingly different from other countries. In most European countries the share of national cruise passengers to “local” destinations and itineraries – in which the local port is included – is substantially higher (Figure 7). This share is evidently particularly high for countries in the Mediterranean, such as Greece, Italy and Spain. However, cruise passengers of other smaller countries with similar climates to Ireland, such as Scandinavian countries, Belgium and the Netherlands, also choose relatively more often “local” cruise itineraries in which the local port is naturally included. Dublin can only develop into a cruise home port if there is a larger number of Irish residents going on a cruise that includes Ireland.

One of the strong arguments for home porting to Dublin is the international airport with reliable and frequent flight connections. According to Lekakou, Pallis and Vaggelas (2009) this is the most important

criterion for cruise lines when they consider home ports. Such facility and associated services are crucial to facilitate access of passengers to the starting point of a cruise, especially when the planned cruise is far from the origin country of the passenger. Dublin already markets itself as a home port for North American passengers thanks to its airport, which has even more force considering the lack of such an airport facility in Southampton, the largest UK cruise home port. Dublin Airport offers 268 flights to North America per week, so around 38 flights per day. It also provides many options for European passengers through its connections to 100 other European airports. Another advantage is that the airport is reachable from the port in 15 minutes by road, thanks the Port Tunnel that opened a few years ago. It is also only 12 kilometres away from the city centre. The airport offers a pre-clearance check-in service for passengers going to the United States as well, which is presented as advantage to attract them and American cruise lines.²

Figure 8. Number of daily intercontinental air connections in selected European cruise ports (2014)



Source: Own elaboration based on data from Innovata Airlines Schedules.

Note: Data refer to week 32 (early August) in 2014; intercontinental flights include Russia and Turkey.

The lack of dedicated cruise berths and structures, indicated earlier in this report, is also more of a constraint for home port activities than for transit passengers. The port of Dublin currently uses a warehouse at one of its multi-purpose terminals in case of turnaround calls but the facility is fairly basic. As mentioned earlier, the new port's master plan includes a dedicated cruise berth close to the city centre. However, the project currently does not include a terminal building, even if it provides the possibility to add such a building at a later stage. The cruise berth is located next to the city, which increases the possibility of walking from the port to the city or taking public transport. The redevelopment of the Dublin Docklands will also provide cruise passengers and crew with a number of facilities in close proximity to the cruise berth.

What are Dublin's prospects?

Within Ireland, Dublin is regarded as the major and first Irish port of call. As a capital city, Dublin remains the most important stop for cruise lines and their passengers. When a cruise ship has one call in Ireland it will very likely go to Dublin rather than any other cruise port in Ireland. Most other Irish ports are rather complementary ports of call, like Waterford, and lack infrastructure for large vessels but have good brand recognition. Cork could to some extent be considered as a competitor (at least according to Bermello, Ajamil and Partners Inc., 2012), but it is not a marquee port to the same extent as Dublin.

Even though Ireland does not represent a large passenger source market, the penetration rate of cruise tourism among the Irish is fairly high and could increase in the coming years. As mentioned, one of the distinguishing elements of Irish passengers is their unlikeliness to go on a cruise in their own country. This seems to be a first potential source of additional cruise passengers to Dublin and other Irish ports, which could also cement a strategy of Dublin to have more home port calls.

The general idea in Dublin is that the port is particularly interesting for American cruise line's North-European cruise packages. This is due to its international airport with numerous flights to North America as compared to others in the area (it offered over a million seats in 2014). Furthermore, it is also due to the historic connections between Ireland and North America and to a considerable share of Americans with Irish origins. It could indeed be convenient and attractive for Americans to use Dublin as a fly-to home port for their cruise trips. It is however not the only market on which the Port of Dublin could capitalise.

Dublin could market itself more as a destination for European cruise passengers. Some important European cruise home ports are a starting point for European cruisers that do not necessarily come from the country's source market. Barcelona, Venice and Piraeus are good examples since the Spanish, the Italian and the Greek market are not among the largest passenger sources in Europe. These ports are used at the same time by locals and passengers from the rest of the world (mainly Americans and other Europeans) that want to cruise in the Mediterranean. Considering the good air connectivity from Dublin to the rest of Europe, Dublin could market itself as a home port for Europeans that want to cruise in the British Isles or the north of Europe. Southampton currently is the dominant player in this market, with an impressive number of terminals, very good access for cars and dedicated infrastructure at each terminal even if the services offered are limited. However, Southampton does not have Dublin's advantage, which is a well-connected airport from which the port can be reached very quickly.

The economic impacts of cruise shipping for Dublin

Cruise shipping can generate local economic benefits which could include direct economic value generated from port revenues, spending by passengers, crew, and the ship in the form of local provisioning. Other benefits could result from cruise shipping such as job creation and the potential increase in tourism traffic in general. For Dublin, the existing knowledge on the economic impact of cruise tourism is very limited. The only reference is one study from 2010 commissioned by Tourism Ireland that looks at spending from passengers and crew, and port tariffs. There are no studies on the employment impact of cruise tourism in Dublin or in Ireland. The overview below is a fairly qualitative assessment based on findings from a series of interviews with relevant actors in Dublin.

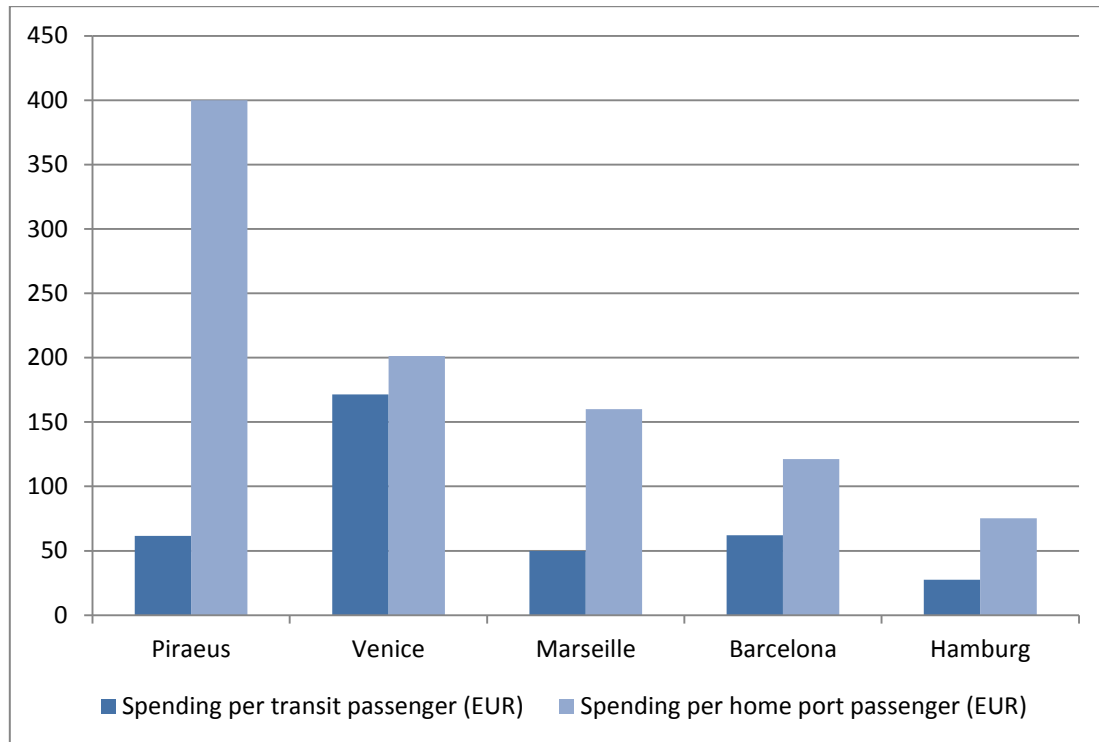
Passenger spending

Cruise passenger spending in Dublin represented around EUR 10 million in 2010, approximately EUR 100 per day (Tourism Ireland, 2010). This study found crew spending of EUR 46 per day, and generally lower economic cruise impacts for Ireland as a whole, where average cruise passenger spending in 2010 was EUR 71 per day and EUR 20 million in total. The amount of cruise passenger spending was found to be similar for general tourists, which could be considered striking as spending by these tourists also includes accommodation. These findings were based on 720 face-to-face interviews with cruise passengers and crew on their spending patterns, conducted from August to mid-September 2010 at various Irish ports. These spending patterns are confirmed by more qualitative observations. Businesses associations indicate noticing a difference when cruise passengers are in Dublin, which has a positive impact on the activity of their members, such as in shops, restaurants and attractions.

Passenger spending is in line with international practice. A meta-analysis of port impact studies that cruise passengers spend on average around USD 100 per day in cruise ports (OECD, 2014), which is comparable to the numbers for Dublin. However, evidence from various studies also indicates that spending from home port passengers is usually much higher; on average six to seven times more than from transit passengers, according to GP Wild and BREA (2007). Our comparison of spending by home port and transit passengers in a selection of ports confirms the difference in spending, although with a large variety in spreads (Figure 9), with big differences in Piraeus and Marseille, and more moderate differences in Venice. The determining factor there is the extent to which home port passengers actually stay in the city before or after their cruise journey. In the case of Venice around half of the home port passengers do not stay in the city, so the revenues from these passengers are very low. However, in the case that home port passengers actually stay in the city – which is the norm – increasing the share of home port passengers in Dublin might also translate into higher economic impact per passenger.

Cruise passengers and crew expenses generally benefit certain types of businesses in a city. The main sectors of activity to which they contribute are hospitality through restaurants, bars and hotels; the tourism industry through local attractions, museums and other cultural sites; the retail sector, especially through buying clothing, accessories and souvenirs; and the transportation sector whether it is public or private transportation offer. Depending on the type of calls and visitors, expenses are generally not the same. From the collection of various economic impact studies, it can be established that the expenses of transit passengers, those of home port passengers and those of ship crews show that each group does not prioritise the same elements (Figure 10).

Figure 9. Economic impact of home port vs. transit passengers



Sources: Corres, 2012; Handelskammer Hamburg, 2013; Marseille Provence Chambre de Commerce et d'Industrie, 2010, Venice Passenger Terminal, 2013; Barcelona Catalonia, 2014.

Transit passengers tend to spend the highest share of their expenses on excursions and retail products. Home port passengers generally dedicate the largest part of their budget to accommodation before or after their cruise and to food and beverages. Some studies also find that local transportation expenses for these passengers are much greater than for crew and transit passengers. Crews generally spend most of their money on food, beverage and entertainment when they are at cruise ports. They also attach importance to affordable retail offer and tend to spend money on clothes and other necessity items. They can also be looking for bank services for remittances and internet connection to keep in touch with their family.

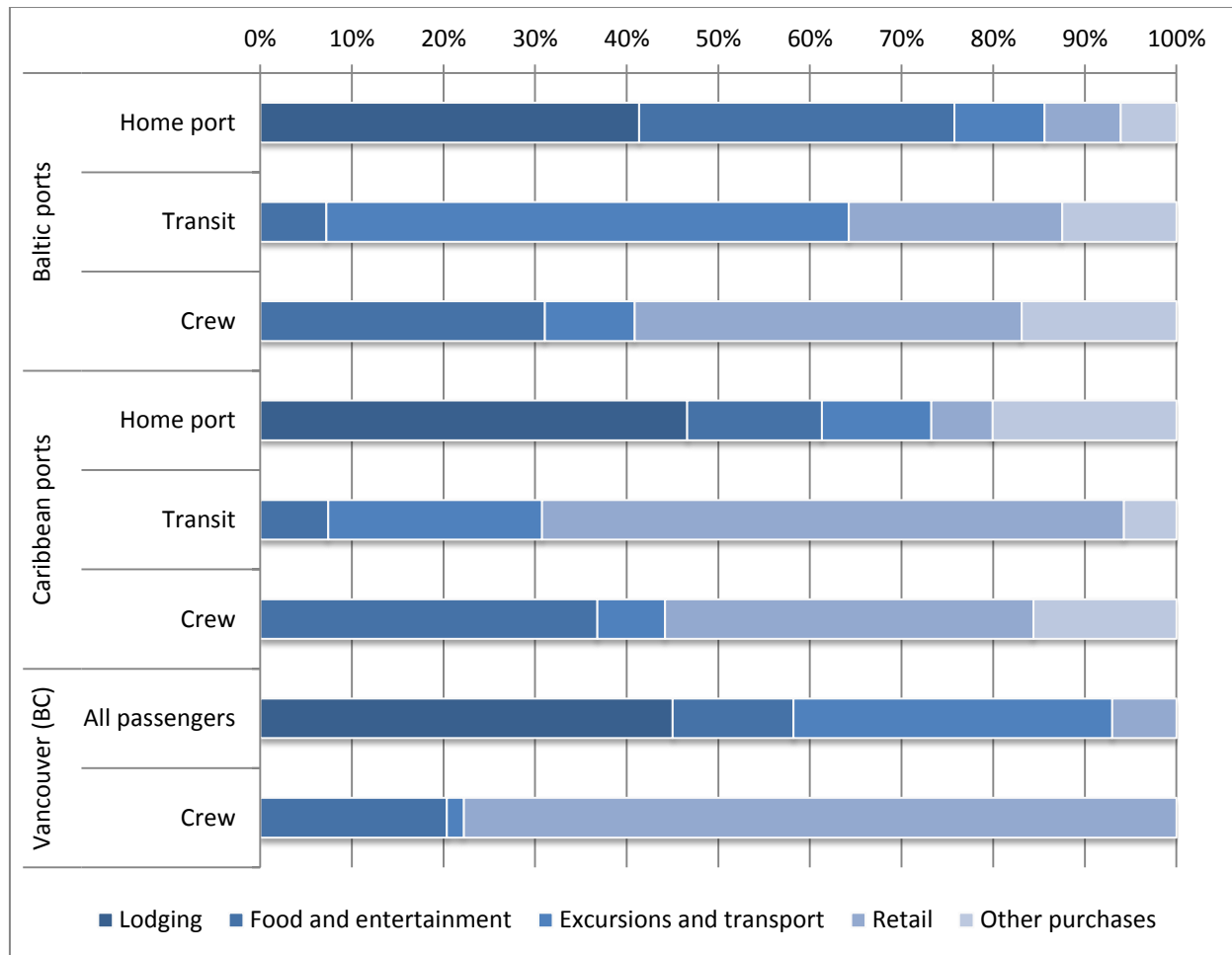
In Dublin, retail is the sector that currently benefits the most from cruise shipping, according to Tourism Ireland (2012). It represents 50% of passenger expenses the ship is on call, and 65% of local craft and souvenirs are included. Entertainment and cultural attractions are also an important part of the budget with respectively 17% (other expenses and entertainment) and 3%. Food and beverages are the third most important expense from cruise passengers, representing 14% of the daily budget. Transportation only represents marginal expenses as it amounts to only 1% of passenger expenditures in Dublin.

Our own observations confirm the local economic impacts of cruise shipping. Business associations reportedly know from their retail members that the venue of cruise ships in the season can be felt in stores, even if it is often hard for shops to distinguish cruise passengers from the other tourists and therefore to evaluate their contribution. The top-end retail store Brown Thomas notices on average for each day of a cruise call that its revenues paid in USD increases by 25%. Likewise, payments in CNY

(People’s Republic of China yuan) at the store also increase by this percentage. The Guinness Storehouse, one of the main tourist attractions, sees a clear impact from cruise tourism.

In some cases, the affluence of cruise tourists risks to undermine the attractiveness of certain of Dublin’s assets. Various popular attractions, such as the Trinity College with the Book of Kells, get saturated when large ships arrive and bring several thousand passengers that mix with land-based tourists. If cruise tourism generates large revenue peaks for these attractions, it also has the potential to deteriorate the experience of visitors at popular sites of the city because of congestion and time loss. This is luckily not necessarily always the case. The Guinness Storehouse, one of the most affluent attractions of Dublin, was designated Europe’s Best Tourist Attraction in 2015. This is particularly critical to cruise tourism, knowing that passengers only get a few hours in town. In addition group entrance fees are mostly likely negotiated at a lower cost per head which means that cruise tourists bring less value to these venues than regular tourists.

Figure 10. Cruise visitor expenses per spending category and visitor profile

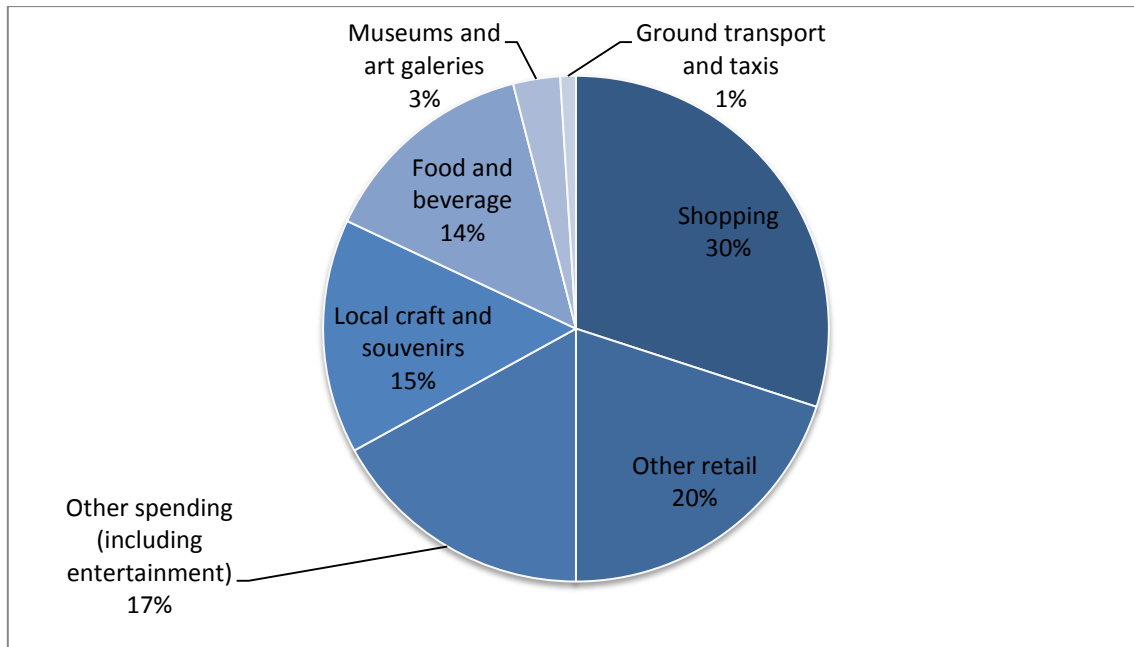


Sources: BREA Baltic, 2014; BREA Caribbean, 2012; BREA Canada, 2008.

Local actors have undertaken initiatives to exploit the economic potential of cruise passengers to Dublin. “We are Dublin Town”, a business association, goes on cruise ships to inform passengers about the city’s attractions, answering frequently asked questions about things like shopping possibilities and tax refunds. The retail store Brown Thomas actively targets and provides specific services to cruise

passengers, e.g. it offers delivery services to the ship for items bought at the store and tries to adapt the offer to the type of clients that will be coming. Some top-end restaurants have also targeted cruise tourists and have adapted their times (earlier lunches) and menus. They generally collaborate with excursion companies so that everything is planned ahead and clients are satisfied.

Figure 11. **Cruise passengers daily expenses while on a day visit to Dublin**



Source: Fáilte Ireland, 2010.

Dublin has the potential to maximise the economic benefits brought from its transit cruise passengers. In the data provided by Fáilte Ireland, no distinction is made between the expenditures of cruise tourists that join excursions and those of passengers that do not. Local businesses and associations in Dublin believe that there is great economic potential to gain from the latter category, since everything they spend goes directly into the city without going through cruise lines. This part of passengers can also be increased given the fact that some of the passengers that did not book excursions would rather stay on the ship. Better targeting of this population would enable an increase in the economic impact of cruise shipping in the city. The association “We are Dublin Town” is pro-active in promoting the diversity that Dublin has to offer in trying to convince people to go have their own personal tour in the city. It visits all cruise ships to inform cruise passengers on the facilities in Dublin.

There is also great potential to increase expenditures from cruise ship crews in Dublin. Currently there is no special offer for them, but this particular population is inclined to spend on specific items when they are at a cruise port for a few hours. Since a lot of the services for crew are not free on the ship, they are actively looking for services such as an internet connection when at berth. Since they spend long months on board as well, they also highly value quick access to good value-for-money retail brands. In light of their preferences, it appears that the future developments and premises that will open in the Dublin Docklands (such as the Point Village shopping centre) can be great places for crew and could benefit from this client base.

Dublin would also gain greatly from receiving a larger number of cruise turnaround calls. The potential extra revenues that would be generated from home porting would be particularly great for the

hospitality sector, provided that sufficient hotel capacity is in place. Not all of turnaround passenger decide to stay before and after their cruise but if they do the value to gain is great as the average expense per passenger rises sharply. This implies that the city needs a strategy to attract these patrons in staying for a few nights which would generate significant revenues for hotels, restaurants and transportation companies.

Cruise lines, local expenses and ship provisioning

Local provisioning by cruise lines is marginal. American cruise lines that reposition their ships in Dublin send all the goods they need from the US, including fresh products. For instance Princess Cruises would send 5 to 12 containers per cruise ship from Fort Lauderdale, half of which consists of reefer containers with food. It is estimated by local actors that approximately 95% of supplies comes directly from the US; the remaining 5% constitute emergency or last-minute needs that would have to be bought locally.

Cruise shipping is not the most lucrative business for port-related actors in Dublin. Agents and stevedores recognise that the cruise industry is a particularly challenging one because it brings very large volumes to the port but very small returns compared to other shipping activities. Cruise lines are unpredictable and hard to rely on as they may switch from one contractor to the other or one port to the other from year to year. Despite these facts, port actors follow the position of the port and are willing to keep operating cruise ships because they believe it benefits the city.

For excursion companies there is a lot of pressure from cruise lines and very little loyalty. Cruise lines are always looking at reducing costs to a minimum which makes it a challenge for excursion companies to meet their requirements of service quality as well as the cost cuts they require and there is constant fear that the contract will go to the competitor. Rules imposed by cruise lines are perceived as very strict in terms of service efficiency and quality and come with huge mark-ups on local prices. Also for excursions companies, cruise ships represent a lot of work for relatively small returns. The assignments related to cruise shipping, however, represent 100 to 115 jobs during the cruise season.

Revenues for the port authority

The revenues generated by cruise shipping for the port authority are limited compared to other types of cargo. On the basis of 2010 and ports tariff policies, cruise revenues from port charges amounted to EUR 3.2 million, of which EUR 1.3 million concerned calls at the port of Dublin (Tourism Ireland, 2012). Dublin Port Company estimated cruise revenues at around EUR 1.2 million in 2014. The port authority is willing to provide berthing for cruise ships because it acknowledges the value this form of tourism generates for the city. It uses other commercial activities to cross-subsidise cruise activities and the new developments that will enhance Dublin port's capacity as a cruise port. Dublin Port Company has illustrated this by assessing at which point the port's capacity would be saturated given the forecasted increase in cargo traffic at the port. Furthermore, they compared this to a situation in which the space for cruise shipping would be used for cargo handling, in order to identify the opportunity costs of cruise shipping to the port authority. In the option whereby the port would give up cruise shipping, it would gain six extra years of cargo handling before reaching capacity.

Policies and governance for the port of Dublin

Dublin Port Company recognises the importance of developing new cruise facilities to enable further growth of the business for Dublin. This is reflected in the port's Master plan for 2012-2040. The plan sets out how the port will develop over the period and focuses on the optimisation of the current port area to increase capacity and avoid land reclamation in order to minimise the environmental footprint of the port and concerns around it. The most critical part of Dublin's activity as a port is Ro/Ro shipping; it represents a large part of the local business, for which capacity constraints were projected. The master plan integrates this need for additional capacity with the desire to develop other activities, including cruise shipping. Dublin Port Company would like to develop this activity because of the significant revenues it generates for the local economy, even if the returns from the cruise business are not very substantial for the port. Another aim of the master plan is to integrate the port with the city and its inhabitants, by creating more linkages and enhancing the aesthetics of the port. Cruise tourism and the relocation of dedicated terminals closer to the city would contribute to this and benefit from it as well.

Towards a dedicated cruise terminal

The cruise ambitions of the Master plan 2012-2040 gave birth to the Alexandra Basin Redevelopment Project (ABR). The ABR Project will facilitate two berths that can handle cruise ships of 360 metres side-by-side, alongside a 230-metre cruise ship in the Alexandra Basin, which is adjacent to the East-Link bridge across from the Luas light rail system and a 10-minute walk from the city centre. These berths will have priority to the cruise ships during the cruise season, outside of that it will be utilised as a multi-modal facility. Its proximity to the city would make ships visible in the city centre from the River Liffey quays and could provide better and faster connectivity with the city centre. The three new cruise berths would give the port a capacity for 1 000 yearly calls. From current traffic trends, Dublin Port Company estimates that at best, there will be no more than 200 calls from cruise ships per year in the years after the new terminals are built, hence the multi-functionality of the terminal (Bermello et al., 2012) The ABR Project will enable the visit of larger ships with longer, new berths and a deepening of the river to 10.5 metres. It will also provide a more optimal environment, as passengers will no longer have to embark and disembark in a cargo handling area. The new terminal will provide much more attractive conditions for cruise lines and leave enough space to consider building facilities to ease the passenger handling process.

The new berths proposed by Dublin Port Company will require an investment of EUR 30 million out of the EUR 230 million needed for the whole project. The port will be conducting large investments to provide new infrastructure but is also seeking collaboration with other parties such as Dublin City Council, Dublin Chamber of Commerce, Tourism Ireland and the national Department of Transport, Tourism and Sport. The ABR project has been subject to approval for a planning permission by the national planning authority (An Bord Pleanála),³ a procedure which also assessed possible impacts on the environment generally and specifically on protected Natura sites. The approval by the national planning authority was granted in July 2015.

The need for an urban cruise strategy

The importance of cruise shipping is acknowledged by the City of Dublin. Within the 2011-2017 Development Plan the importance of cruise tourism for Dublin City Council is included in the goals set

for city tourism as a contributor to the revitalisation of the local economy. Dublin City Council acknowledged the need to formulate an assessment of the available berth options for cruise ship and to provide recommendations for potential relocation and cultural tour options for passengers. This was done in the Dublin Region Action Plan (2009), which was formulated as part of the URBACT Cruise Tourism and Urban Regeneration (CTUR) programme of the European Union (Box 1).

There is large potential interaction between city policies and cruise shipping. The development plans of Dublin City Council integrate many objectives that have an impact on passenger experience in the city and the successful development of the industry in Dublin. Conversely, the development of cruise tourism in the city could enable achieving some of Dublin City Council's development objectives. For example, the last City Development Plan to date (2011-2017) took steps towards a long-term vision in which Dublin is a connected, compact, sustainable, green and liveable city of international reputation. Economic growth and recovery, efficient transport connections, smart land use, regional integration and promotion and greening the city are all priorities for the city. The previous development plan focused on extending the inner city eastwards towards the Docklands; it was then complemented with a strategy for the quality consolidation of the inner city, protecting heritage while promoting diversity.

While Dublin City Council has lacked a specific cruise strategy until recently, it now sees the value of developing one. Most of the objectives and opportunities set out in the CTUR local action plan were not implemented, apart from the project to develop dedicated cruise berths. The other ideas had been left aside by most stakeholders that continue to work independently to handle the cruise business and strategy. No comprehensive governance structure or marketing efforts are operated through collaboration of various stakeholders.

Dublin City Council is now working on the future City Development Plan (2016-2022), which provides an opportunity to underline the importance of cruise tourism to the city. The City Council has so far released an issues paper and opened to public consultation. Similar development lines as in the previous plan are set in the document with a particular attention to the importance of tourism in the city of Dublin. Nothing specific on cruise tourism was mentioned, but it is now on the agenda for the final plan. The invitation by Dublin City Council to Dublin Port Company to make submissions for the future development plan goes in the right direction to integrate cruise shipping as a strategic sector to develop for the city of Dublin. Dublin City Council is generally supportive of Dublin Port Company's projects, as shown through its advocacy in favour of the Alexandra Basin Redevelopment Project.

The development of a joint cruise strategy by the city and the port and its active implementation could increase its economic development potential. The ABR project will provide an impetus to the attractiveness of cruise shipping in Dublin that the city could build on. The beneficiaries of cruise shipping are the city and the local businesses; these benefits could be substantially increased if Dublin were to develop its position as potential home port. The port has understandably been hesitant to develop such a function; the city is a logical actor to support home port development as it will generate positive economic impacts for the city.

Underlining cruise shipping in the tourism policy

The tourism orientation of Dublin is expressed in a report, "Destination Dublin: A collective strategy for tourism growth to 2020" released in late 2014. This is the work of the Grow Dublin Taskforce, a body composed of tourism and business organisations in charge of defining a strategy for the growth of tourism in Dublin, created in 2014 by Fáilte Ireland, the National Tourism Development Authority. Among the findings of the preliminary research, the taskforce realised that Dublin had a great potential for attracting more tourism but that it was lagging behind other major European cities in terms

of strategy. To remediate this, the report sets objectives to establish a strategy for identifying market segments with great potential; creating a new brand and a more modern image for the city; and maintaining and developing collaboration between different interests to ensure the realisation of Dublin as a major touristic city in Europe.

Box 1. URBACT Network: CTUR Project and Dublin Local Action Plan

In 2010 Dublin participated in the URBACT Cruise Tourism and Urban Regeneration (CTUR) programme of the European Union. This initiative gathered 11 member countries to identify how port cities can be productive and not just seen as transit destinations for cruise tourism. The programme was therefore looking at tensions between port and city functions and at governance to solve them and ensure better relationships and fulfil the aspirations of inhabitants. In many cities, the cruise industry plays an important role in the rejuvenation of waterfronts, the attractiveness of the city and in the integration between the port and the city as it creates a form of interface between the two. The project was led in Dublin by a local support group chaired by Dublin City Council in partnership with Dublin Port Company and the Dublin Docklands Development Authority. It was managed by the Southern and Eastern Assembly. The group also integrated consultation with research, education and tourism sectors (Dublin Institute of Technology, Dublin Tourism, and Fáilte Ireland), the private sector (Excursions Ireland, Crosbie Properties, and MJM Marine), representative business organisations (Dublin Docklands Business Forum, Dublin Chamber of Commerce, and Dublin City Business Association) and the Irish cruise association Cruise Ireland.

The local action plan set out three main objectives:

- “to transform, regenerate and adapt the physical and environmental components of the port, in order to improve connectivity between the port and the city centre”
- “to maximise cruise traffic and port heritage as a means to achieving social and economic regeneration”
- “to plan and manage the cruise traffic development within a global port city project”.

The outcomes of the project were to set guidelines and a vision for Dublin as a cruise port that could enable better integration of the Docklands in the city, as well as the port and the city in general.

The report provides recommendations concerning terminal relocation at the North Quay Wall Extension, as a way to better connect the port and the city, as well as to provide cruise passengers a better environment for embarking and disembarking, with views of the city. It also recognises the importance of landscaping at the terminal, of the provision of a terminal building in the latest completion phase and of the development of a high quality pedestrian and public transport connection from the city to the terminal. The project also highlighted the potential to further develop the Docklands through planning for the quays, new transportation projects, preservation and utilisation of more industrial heritage buildings, the creation of a visitor centre in the Docklands.

The report also acknowledges the importance of ongoing collaboration between Dublin City Council, Dublin Port Company and Dublin Docklands Development Authority and points out the need to establish an organisation or agency to promote and increase the cruise traffic industry in Dublin with regular and formal meetings in the shape of a forum. This forum would include the three parties as well as the tourism sector (Fáilte Ireland, Cruise Ireland, etc.), potentially other members of the local support group and institutions like Dublin City Centre Business Improvement District and City Council Departments to set out and implement objectives. Finally the local action plan recognises the need to come up with a clear cruise marketing strategy for Dublin to make it a world class destination. This will also require extensive collaboration from all parties and the development of a clear and common vision for Dublin as a cruise port.

Source: Dublin City Council (2011).

The report identifies cruise tourism as an important target market for the development of tourism in the city. It also preconises the creation of a “Cruise Dublin Forum” and highlights priorities such as developing the attraction of the city for visitors and a marketing plan, maximising the infrastructure for cruise shipping and passenger spending at the shore-side and providing collaboration between actors for the support of visitors and the enhancement of their experience in the city. Shortly after the report of the publication the Grow Dublin Alliance was founded: a group in charge of implementing the strategy and developing a new branding for Dublin in order to attract more tourists, increase revenues and push forward job creation. Composed of public and private stakeholders from the Greater Dublin area in various industries, the group will also be in charge of overseeing the creation and action of the Cruise Dublin Forum in the near future. This is a promising initiative that deserves support, provided it manages a common understanding and vision of the different actors on the opportunities and challenges of cruise shipping for Dublin, including common and practical solutions to bottlenecks mentioned in this report.

All local actors acknowledge the benefits cruise shipping brings to the city and generally agree that the most profitable solution for the local economy would be to become a home port. However, this does not necessarily reflect on their policy making. Several plans integrate cruise as an important element for future development of the city and their other strategic goals can be related or achieved partly thanks to an increase in the cruise business.

Communication also remains one of the most important elements to make sure cruise shipping has a great impact on the local businesses and tourism industry. There is still little promotion of the city as a cruise port. The current communication efforts are mainly undertaken individually by actors that have an interest in the benefits than can be generated by the arrival of cruise passengers in the city. They are quite generally directed at enhancing the passenger experience while in the city and to inform them of the variety of attractions Dublin offers. Local communication and city promotion is done mostly by organisations like “We are Dublin Town” or the Dublin Business Improvement District, that assist passengers on cruise ships when they are on call and to provide them with the relevant information to have a great experience in the city. It is also important to raise tourists’ awareness about the diversity that Dublin has to offer (attractions, dining, shopping, culture, sports, etc.).

There is a need to develop information about these elements and help people compose their own excursions fitted to their interests. This should be done jointly by various actors, by creating a platform with all the inputs available. By means of example, a website on which contributions by all stakeholders could communicate and inform tourists before and during their cruise would also be very beneficial to give incentives for them to start their own excursions. This could enable them to feel like they are having a more authentic experience of the city which is increasingly praised by tourists. It could also potentially generate more local value since their expenses would not be partly captured by cruise lines. Dublin would also gain from more integration and involvement of the population with the city’s maritime heritage and culture through by dedicating part of the communication or events to locals as well.

Enhancing the communication strategy also concerns developing more efficient marketing tools for Dublin as a cruise destination. Building a complete team of different stakeholders in the industry would be a good way to introduce Dublin at international cruise events such as Seatrade Miami and to promote Dublin as a cruise port and potential home port to consider. Boosting international co-operation might be part of this branding exercise. The Dublin City Council is leading the “AT Brand” project which is a co-operation initiative and includes the cities of Cardiff and Liverpool in the UK, San Sebastian from Spain, La Rochelle in France and Faro in Portugal. The overall aim of the project is to explore the feasibility of a long-term strategy to co-brand the Atlantic area. Over the eighteen months of the project, through regional and local projects, partners will develop a roadmap for co-branding the Atlantic area. It is hoped that this roadmap will play a key role in the development of integrated city branding throughout

Europe. The project will help Dublin strengthen its position internationally as a world-class business location, a top tourist location in Europe and a highly desirable location to study and live in Europe. An interactive digital platform will help showcase the city's strengths to the wider public in a more appealing format using new and innovative city branding techniques. It would make sense in this effort to also promote Dublin as a cruise destination.

Considering a cruise terminal's need for a terminal building

Cruise companies are concerned with quality and security issues for passengers. They demand and prefer dedicated infrastructures and services from cruise ports, such as customs and immigration handling, docking and anchorage, transportation possibilities and connections, taxis, coaches and high level excursion services as well as port area infrastructure. A terminal building is an important part and facilitates passenger handling and experience within ports.

However, the issue on terminal buildings on cruise terminals is entangled with various challenges. First of all, there is the question of whether terminal buildings can help to increase the number or share of cruise turnaround calls. Secondly, there is the question of who gets the benefits of investment. Cruise shipping usually provides economic benefits for the city and its economic actors, but much less so for ports. If terminal buildings decrease the extent to which cruise terminals can be used for other purposes as well, they provide opportunity costs to ports, in particular in those areas where cruise shipping is seasonal. These split incentives raise the question of who should be responsible for financing cruise terminal buildings. Since cruise ships are movable assets, they can easily be moved from one port to the other which makes infrastructure investments fairly risky as well, especially if cruise lines are not directly involved in the port's cruise business, e.g. by operating a terminal or participating in financing the infrastructure. In order to answer these questions, we assessed available terminal infrastructures at home ports in Northern Europe and Canada that present some similarities with Dublin, the findings of which will be provided in Table 2.

There is a large variety between cruise home ports with respect to available infrastructure and services, which makes it difficult to discern one single tendency. Rather, there seem to be a couple of different models. Some successful ports use a somewhat minimal approach while ports that have less turnaround calls might have invested in flagship infrastructure at early times. These facilities are permanent buildings in the great majority of cases. When ports do not have enough space or infrastructure they often use tents or other multi-functional spaces such as warehouses as a temporary solution. There does not seem to be any rule concerning the time at which a terminal building is required to operate cruise ship turnarounds. If at some ports such buildings are created explicitly for new demand from cruise lines at most others they come after there is already a significant interest from them and new investments are made in prevision of future capacity needs. Generally, it is not possible to show whether or not building facilities increases the number of turnaround calls at cruise ports given that many other factors could explain growth in demand from cruise lines and that it has been growing with the size and offer from the industry and passenger source markets (Table 2).

Most pure home ports, ports which cruise calls are almost exclusively turnaround calls, have had available infrastructure to operate turnarounds for a long time. Southampton especially has a much longer history with cruise shipping since the city was one of the most important ports in Europe for ocean liners and already had facilities for passenger logistics since 1950 at the Ocean Terminal. Since then the port never stopped developing and creating new infrastructure to accommodate ever larger ships and demand from cruise lines. Vancouver started integrating cruise in the planning for Canada Place in 1978 and the terminal was finally opened in 1986 as cruise holidays were already important in North America. German ports of Hamburg and Kiel are the exception as they developed buildings more

recently compared to the progression of cruise traffic in Europe. This can be explained by the fact that before the early 2000s, there was only very little cruise traffic in Germany that was a rather small source market. As the cruise offer grew in Europe, Hamburg developed as a cruise port to satisfy growing cruise demand from German cruisers. Similarly, Kiel invested in two buildings in seven years following potential demand of the German passenger market. Vancouver and Southampton have long been strategic places to start cruise journeys and were the first home ports in their respective cruise regions. Vancouver benefited from being located next to a large source market and an attractive cruise area. Southampton was also ideally located close to the first important European source market and at good distance from several cruise zones with great potential (Baltic, British Isles, North Sea).

Other large cruise ports in Northern Europe are rather hybrid in the sense as they have a more balanced share of calls between turnaround and transit. These ports also tend to have terminal buildings available for ship turnarounds but their experience with them varies from one port to the other. Dover has two buildings available for cruise turnarounds to accommodate around 150 000 turnaround passengers a year. It renovated an old port building that was already available and recently decided to invest in a larger and newer building to accommodate more turnarounds from larger ships. On the contrary, Liverpool is just starting to gain cruise calls. While it has minimal infrastructure, it still has covered areas and a few facilities dedicated to cruise passengers. There are discussions around the conversion of the old Cunard Building into a passenger terminal but no development project has been validated. Amsterdam invested in a multi-functional flagship terminal building and seems to have been successful at attracting turnaround calls with it. Stockholm, a large transit port that still hosts a significant number of ship turnarounds has many berths among which one has a modern cruise centre to operate them. Rostock has invested in infrastructures similar to these two last ports and also uses them as multi-functional spaces to host other types of events.

There is however one striking exception: Copenhagen has waited a long time to invest in a cruise passenger terminal facility. While the port now has three terminal buildings, it first developed an efficient strategy to manage cruise turnaround calls without dedicated infrastructure and succeeded in attracting a lot of similar calls. The port succeeded in becoming one of northern Europe's leading home ports with very limited means, which has inspired Dublin. The only facilities available for cruise passengers before 2014 were one upgraded warehouse and two to three large tents (up to 2 500 m²) to handle turnaround calls. Since May 2014 three new terminal buildings and new berths became available after an investment of EUR 12.5 million.

Other important ports that have very little turnaround traffic generally have fairly minimal facilities dedicated to operating cruise calls. Having a terminal building in this case is more an exception like at the port of Le Havre. Helsinki, Oslo and Tallinn are all important passenger ports with a lot of ferry connections to surrounding countries. They all host a large number of cruise ship stopovers as well. The three of them have passenger terminal buildings dedicated to ferry traffic but they do not have specific infrastructure for cruise passengers. However, in exceptional cases the passenger buildings can be used to operate cruise ship turnarounds even though other alternatives such as tents can be preferred due to the frequency of ferry trips and the need to maintain the service at passenger terminals. The presence of ferry terminals still provides cruise passengers with a good environment and services at the port; it is more adapted to cruise line requirements as opposed to having no infrastructure.

Various stakeholders in Dublin would support the development of Dublin as a cruise home port; they believe that the presence of a terminal building is important to realise such an ambition. Our assessment of practices elsewhere shows that there is no universal tendency in this respect and that different pathways are possible for ports aspiring to be cruise home ports. An attractive terminal building might give an impetus to ambitions to become a home port, but also risks being underutilised for most of

the time, especially if the number of turnaround calls would remain limited. This is the balancing act for cruise ports wanting to attract more turnaround calls. The example of Copenhagen shows that it is possible to develop into an important turnaround port without a dedicated cruise terminal building, but this could be an exception rather than the rule.

Table 2. **Terminal buildings at home ports in Northern Europe and North America**

Port	Share home porting (2014)	Terminal Buildings	In use since
Amsterdam	52%	Passenger Terminal Amsterdam Felison Cruise Terminal	2000 2012
Helsinki	10%	None (3 ferry terminals)	NA
Stockholm	16%	Stockholm Cruise Center Frihamnen	2008
Vancouver	100%	Canada Place	1986, renovation 2011
Copenhagen	41%	Ocean Quay Terminal 1 Ocean Quay Terminal 2 Ocean Quay Terminal 3	2014 2014 2014
Southampton	95%	Ocean Terminal Queen Elizabeth II Terminal Mayflower Terminal City Terminal Ocean Cruise Terminal Berth 104	1950-1983 1966, modernised 2003 1960, renovated 2003, 2015 building renovation 2003, modernised 2007 2009 2015
Hamburg	95%	Hafencity Altona Steinwerder	2004/2018 (new terminal building) 2011 2015
Le Havre	2%	Terminal Croisière Le Havre	2007 first elements, finished 2010
Dover	61%	Terminal 1 Terminal 2	1914, renovations 1996, 2014 2000
Liverpool	38%	None	In discussion
Oslo	5%	None	NA
Kiel	86%	Ostseekai Ostuferrhafen	2007 2014
Rostock	54%	Warnemünde Cruise Center	2005
Tallinn	4%	None (3 ferry terminals)	

Source: Own data collection based on various interviews.

Our analysis shows that one of the main causes of the limited number of turnaround calls in Dublin could be linked to the limited number of Irish residents going on cruises in Ireland. If the home market for cruises departing from Dublin were not to be targeted, this might already increase the number of turnaround calls in Dublin. The ABR project will improve the passenger experience of cruise shipping in Dublin and also provide the momentum to develop a terminal building structure. The design of the terminal should be done in such a way that a building structure could still be added at a later stage, and reflections should start on what such a structure could be. An attractive solution could be a temporary, simple and cheap roofed structure, functional for passenger embarkation and disembarkation, including facilities for checking, luggage handling, information and food and beverage options, sitting areas and security checks. The terminal could be used for other purposes, such as events or other activities that require such space. Hamburg has had experience with a similar infrastructure at its HafenCity Cruise Center 1 (see Box 2).

Box 2. **HafenCity Terminal Hamburg: Simple and efficient**

The HafenCity terminal building in Hamburg is an example of a simple modular terminal building. The architecture of the 1 200 m² Terminal 1 was inspired by the cargo container and the white sail. Like the container facade made of stacked containers, the interior is also of modular construction, with flexible divider walls facilitating individual adjustment of the space to the differing requirement parameters of each vessel being handled. It is possible to bring in everything necessary to operate average size cruise ship turnarounds, as well as temporary food and beverage facilities. Everything is addable or removable so that the space can remain one large room without separation for events. In 2014, the building hosted eight events, gathering a total of 3 300 guests, which is an accomplishment, but also an illustration of the difficulty to use cruise terminal buildings for other purposes, even if designed in a flexible way.

Cruise calls were handled at this location beginning in the early 1990s. The port then gave the area back to the city, after the unsuccessful application for the Olympic games, to facilitate new planning for the HafenCity area and to re-integrate the cruise berths and terminals. The HafenCity Cruise Center was built in 2004 as temporary structure in this fast developing and attractive area of the city. Its primary function is to handle visiting cruise ships. But when no cruise ships are in port, it provides a platform for special functions and festivities for up to 800 attendees, such as corporate gatherings, galas, conferences, trade fairs and cultural events. The cruise terminal in HafenCity is currently operated by HCC Hanseatic Cruise Centers GmbH. The company is owned by HHLA for 51% and AIDA Cruises by 49%. The wharfage (quay areas including the quay) and the temporary terminal building belong to the city and harbour through the Port City Hamburg GmbH (HCH). From 2016 Cruise Gate Hamburg GmbH will take over operations at HafenCity that is currently rented out on a daily basis by HCC. A new Cruise Center HafenCity will be rebuilt in the framework of the development of Überseequartier-Süd and is thus aligned to the HafenCity project. The works are expected to start in 2016 and the new building should be in operation in 2018. The new project incorporates the terminal building within a larger complex that also comprises a hotel. The available space will be 3 000 m² and large parking areas for cars and buses will also be available (respectively 7 200 m² and 3 000 m²).

With the extent of investments required locally to accommodate cruise ship turnarounds in major cruise ports, the financing of infrastructures and operations at cruise terminals is giving rise to interesting new types of collaborations. Since the cruise business does not only concern ports and have an impact on a lot of other actors and institutions in a city it makes sense that cruise terminals are the result of their joint efforts in support of the port.

One trend is the participation of cruise lines in the financing of infrastructure and their operations at cruise ports. For instance Carnival Corporation invested in two cruise terminals in Barcelona and operates them directly. Since ports often do not have the means to finance such heavy projects

individually they find new ways to create projects with successful outcomes. A few examples are presented in Table 3. Passenger Terminal Amsterdam is a company owned by the Amsterdam Port Authority (49%) with the Dutch National Railways as a majority shareholder (51%). The construction of the new cruise turnaround Terminal Steinwerder in Hamburg gave rise to the creation of the company Cruise Gate Hamburg GmbH to oversee the construction of the building and operate the terminal. CGH is owned by Hamburg Port Authority as a majority shareholder (51%) and the Hamburg Airport company, Flughafen Hamburg GmbH (49%). Venice is also an interesting example with the Venice Passenger Terminal company owned by five shareholders from the Veneto region (Box 3).

Table 3. **Cruise terminal companies**

Port	Cruise terminal company	Status	Role	Owners and shares
Venice	Venice Passenger Terminal S.p.A.	Joint-Stock Company	Ownership and operation of cruise terminal	Venice Port Authority (44%), Finpax (grouping of Veneto Investors, 22.18%), Save (Company owning Marco Polo Airport, 22.18%), Veneto Sviluppo (7%) and the Venice Chamber of Commerce (2.64%)
Hamburg	Cruise Gate Hamburg GmbH	Limited Liability Company	Ownership and operation of cruise terminal	Hamburg Port Authority (51%) and Flughafen Hamburg GmbH (Airport Company, 49%)
Amsterdam	Amsterdam Passenger Terminal		Ownership and operation of cruise terminal	NS Stations (Dutch National Railways, 51%) and Amsterdam Port Authority (49%)

Source: Own data collection based on various interviews.

Box 3. **Venice Passenger Terminal Consortium**

Venice is Europe's leading home port for cruises and the second largest in Europe after Barcelona in terms of passenger throughput. Achieving this position required significant infrastructure investments and efforts which led the port of Venice to delegate the cruise activity to a consortium that would take care of the terminals, the berths and the passenger buildings. Venice Terminal Passageri was created in 1997 to take care of designated missions: investing in infrastructure for the terminals, operation of terminals and buildings, and maintenance of infrastructure.

What is particularly interesting in the structure of Venice Terminal Passageri is the fact that it is owned in majority by the Venice Port Authority (APV). The two other major shareholders are the Marco Polo Airport Company (SAVE) and a grouping of Veneto Investors (Finpax). Finally the Veneto Region and the Venice area are also represented through Veneto Sviluppo and the Venice Chamber of Commerce. This structure enables them to work for the common interests of the region and the city. Since it was created, the Venice Port Authority and Venice Passenger Terminals have joined efforts and invested over EUR 165 million to renovate and improve the infrastructure and to provide the best services for lines, passengers and crews at the Marittima Terminals. The port now comprises six state-of-the-art terminal buildings for cruise ships. Some are renovated warehouses; others are brand new infrastructure built in the early 2000s.

The potential for enhanced transport connections

Coach transport will remain an important way to move around cruise passengers. This is because of age, culture and expectations in the context of a cruise, namely to pay a premium to have everything taken care of. However, this might evolve as profiles of cruise passengers are changing and if repeat visits increase, thus bringing more passengers likely to choose to have their own experience of the city.

Walking from the current cruise berths to the city centre takes a fairly long time (around 45 minutes); the new cruise berths will shorten the distance somewhat, but more importantly it will create a more attractive experience. Another possibility would be increased use of the Dublin bike-share program, with bicycles already available at The Point, next to the future cruise berths. Currently not many cruise passengers use these, but this could change as some cruise lines have bicycle-minded clients; e.g. AIDA has bikes on their ships that passengers can use to discover the destinations. Dublin Port Company is looking at putting another station next to the new berths once they are completed. This could allow passengers to directly use the dedicated bike lanes created on the river banks. Use of the light rail connections of Luas could make sense, since The Point Village, located next to the port, is the last stop; the tramway is empty for cruise passengers and their arrival would run counter the flow of the tramway that in the morning mainly brings commuters from elsewhere to the Docklands where they work. The new cruise berths will be located much closer to the station than they are now, making it easily accessible by foot for cruise passengers. A public bus going to the terminal would also be an option to get passengers closer to the city centre, similar to what is offered in some other ports such as Barcelona or Marseille (Box 4). Water taxis do not seem to have been considered for transport of cruise passengers from the terminal to the city. There is currently one water taxi functioning, a tailor-made ship adapted to the low tides of the river, but it does not seem to offer a lot of capacity. The very limited depth of the River Liffey at low tide is generally considered a constraint for more intensive use of river transport.

Box 4. Port shuttle in Marseille

In 2013 the Port of Marseille (GPMM) decided to introduce a free shuttle bus between the Môle Léon Gourret and Joliette station for cruise passengers. Since the different parts of the port are rather spread out along the coast, Marseille already had its own coaches to move employees from one terminal to the other. Because this was already available, the port decided to offer this service to cruise line passengers as well. One bus is allocated to getting the passengers from the terminal to the city centre when cruise ships are calling at the port. It drops passengers at a point in the city where the public transport network enables passengers to access all parts of the city. It arrives at pick up points every 30 minutes and is completely free of charge. The shuttle is due to continue indefinitely, even though cruise lines are not actively promoting this transport mode that competes with their own shuttle buses.

The new cruise terminal at the city-side boundary of the port will provide new and better opportunities for cruise passengers to reach the city on their own which could be greatly boosted by some adjustments by the Transportation Department of the local government. Dublin City Council is looking at removing the roundabout between the quays – currently an obstacle for pedestrians – for which the budget allocation should arrive in 2016. On a longer-term basis (10-15 years), the city is looking at building a tunnel and a new bridge parallel to the East-Link to bury and deviate slightly the East-Link so that there remains only a small road separating the port and the city, with the current toll bridge converted for more pedestrian and bike space. This would hugely benefit cruise tourism since this precise location is where passengers will arrive after the new terminals are finished. Another option would be to

create a bridge over the East Link or an underground passage instead of building an underground tunnel. Yet another option would be the prolongation of the Luas red line, by creating an extra stop at the cruise passenger terminal. These all seem sensible solutions to improve the connectivity of the new cruise terminal with the city centre. As the ABR project progresses, substantial advances should be made in parallel on the transport connections, so that optimal conditions are in place when the new cruise terminal becomes operational.

Transportation regulation and operation is also an essential element for smooth operation of cruise tourism in the city. Dublin City Council is working on reducing the congestion generated by shuttles taking care of cruise passengers for their excursion tours of the city. Designating a square for parking is the main step forward by the City Council towards that purpose. The city is also working on more general schemes to reduce congestion in the city overall. This is not an easy task as the centre lacks the space needed to accommodate traffic. When a cruise ship arrives there is also important congestion at main tourist attractions in the city like Trinity College or the Guinness Storehouse. This is an issue pointed out by local tourism organisations that would like to divert part of this traffic towards other attractions and activities in the city and its surroundings, also preconising that cruise passengers can make their own tour a more authentic and personalised experience.

The governance of cruise shipping in Dublin

Dublin Port Company is in charge of the infrastructure and regulation concerning the cruise business at the port. It owns all of the terminals and rents some berths for use by cruise lines when they want to call at the port. The main regulatory framework is Dublin Port Company's marine-related by-laws and the port's charging schedule for the use of the services and facilities required by cruise lines. Expenses for the cruise terminals and berths, with the exception of additional security costs when cruise vessels are berthed, are included in general maintenance costs as outlined in the Dublin Port Company's annual budget. Dublin City Council does not have a dedicated budget to cruise-related infrastructure or activities. There are no concessions for terminal operation. Dublin Port Company is in charge of providing the berths, pilotage services, tugs and the hire of ramps and fenders if required. Other private entities involved in the cruise business are ship agents, stevedores and excursion companies that look after passengers when they leave the ship to go on tours around Dublin. There are two stevedoring companies at the port and they both take care of cruise as well as other types of cargo. According to the Irish Competition Authority a lack of competition between stevedoring companies leads to the overpricing of services imposed by these companies in Dublin, which is an issue not specific to cruise shipping in Dublin.

Dublin Port Company collaborates with other actors for the promotion of the Port of Dublin as a cruise port. It is a member of Cruise Europe, along with over a hundred other Northern and Atlantic European Ports. In Ireland, the main partnership it holds is with Cruise Ireland, a non-profit organisation involved in promoting the island of Ireland as a destination for cruises. Membership to the organisation gathers other ports on the island and other interested parties like ship agents, stevedores and ground handlers. More locally, the port has relations with excursion companies and promotion associations so that they can communicate directly with cruise passengers at the terminals or on board the ships.

Several other important stakeholders have a role in promoting the city as a cruise tourism destination but they generally play an individual role to serve their own purposes without any particular co-ordination or co-operation. The establishment of a joint strategy and more co-ordination, e.g. by regular meetings or an institution gathering all parties, would be beneficial for the future of cruise tourism in Dublin.

At the core of such co-operation would be more formal collaboration between the port and the city. In various cruise ports, the port and the city collaborate together, and with numerous other actors, to elaborate strong and coherent strategies and become attractive cruise brands. The co-ordination of several actors would enable better use of available resources thanks to each of them and to coherently develop Dublin as a cruise port. The creation of an institution in charge of defining the strategy and communicating with all actors could enable Dublin to weight more heavily on the international scene of the cruise industry. Team work and taking advantage of each actor's assets would help Dublin become a successful cruise destination. Many other European Cruise Ports have cruise networks or associations in charge of bringing all cruise actors together with this objective. Hamburg provides an interesting example of a joint cruise strategy and governance through Hamburg Cruise Center (Box 5).

Developing an environmental cruise policy for the port

Dublin Port Company has neither a specific green port strategy in relation to cruise ships, nor a developed framework for assessment and mitigation of the environmental impact of port activities. In terms of infrastructure and energy consumption, the port has yet to invest in environmentally friendly options to mitigate the impact of shipping on the city. Currently the port's actions facilitate the storage of galley waste from cruise ships. The vision is that environmental mitigation is the responsibility of the cruise ship. It is via their ships' agent that cruise lines ensure their waste is collected. Dublin Port Company is a member of ESPO's Eco Ports Network.⁴ Other than this and due to Irish regulation, full environmental impact assessments are required for all infrastructure development projects such as the Alexandra Basin Redevelopment Project. Ongoing works on air emissions noise, waste impacts from ships or cruise ships at the port do not seem to exist.

Integrating environmental issues and solutions in the context of port projects would also be a step in enhancing the relationship between the port and the city and to develop mitigation strategies. Dublin City Council's last development plans have emphasized making Dublin a greener and more sustainable city, especially through infrastructure improvements and smart energy consumption. The environmental impact of cruise tourism on port cities is an important topic that might need to be dealt with in a more structural manner by Dublin Port Company. More efforts on that topic could also serve as a facilitator of a potential collaboration between the port and the city on cruise matters as well.

In many port cities, the redevelopment of old port areas in the form of attractive urban waterfronts has been accompanying the development and the success of cities as cruise ports. Dublin is no exception to this trend with The Dublin Docklands that are a strategic area for both the port and the city that could foster the co-operation between the two entities. On the one hand, this means the development of an urban neighbourhood is highly critical for the city and would have great potential for the future in terms of residential, commercial and office real estate. Many lots north and south of the River Liffey still have to be developed. These are essential for the city's image and potential as an appealing city where people want to live and work. On the other hand, the Docklands are located very close to the port, an area that is marked by the marine heritage from the old port of Dublin. The neighbourhood has the potential to become a real link between the city and the port by valuing its relationship. It could also provide cruise passengers and crew with an attractive environment within walking distance from the ship and take advantage of cruise calls to generate more revenues for local businesses. As expressed by the local support group created in the context of the URBACT CTUR Project, it is essential that the Dublin Docklands are integrated as strategic in the definition of Dublin's strategy for cruise shipping.

The Docklands present an opportunity for the city to connect with its maritime culture and to take advantage of the river and its banks to attract ships, water activities and social or leisure life. There are several locations and ways available to host these. The Grand Canal Basin could be converted into a

marina with a hosting capacity of 200 ships. The lock would need to be fixed so as to let ships in, but this would bring great vibrancy to the area that is still waiting for a boost. Along the River Liffey there is also potential to develop small cruise and other types of ships, at least up to the Samuel Beckett Bridge, and further water activities and events. The quays could be used for pop up events and simple removable infrastructure, in combination with a strategy to inform Dubliners and tourists about the city’s maritime heritage and to provide educational activities for children.

Box 5. **Hamburg Cruise Center**

Hamburg Cruise Center emerged in 1998 as an association composed of twelve members ranging from shipping lines, port companies to catering enterprises and hotels. The idea was to revive the cruise business in the city of Hamburg in a joint effort. Now the association counts over a 100 members and has been recognised “best practice” in the cruise industry for destination marketing and its continuous efforts to make Hamburg on the Northern Europe’s biggest home ports over the last two decades. In 2000, Hamburg was hosting less than 20 000 passengers. In 2014, it had close to 600 000 of them with a share of 95% turnaround calls and 5% transit calls.

Hamburg Cruise Center is a platform that brings together actors and businesses that might gain from the cruise activity in the city. It is financed by fixed membership fees and individual non-monetary contributions from members. The main actions HCC undertakes are marketing the city to cruise lines and raising public awareness about the economic benefits the cruise industry brings locally. Its structure is such that it is governed by a wide range of actors which facilitates a coherent cruise development strategy for the city, enables to boost cruise tourism demand and increases the benefits generated in the city by the cruise business. The executive board of the association is composed of leaders from cruise lines (Tui Cruise and Aida Cruises), from ports and logistics services (HHLA), from the Hamburg Chamber of Commerce and from city planning (HafenCity Neighbourhood Management). It is completed by an advisory board mixing representatives of local tourism institutions (marketing and business association), cruise experts, the port authority (through its CEO), terminal operators, other cruise lines and port companies association (representing stevedores, agents, etc.). Since 2011, Hamburg Cruise Center is also in direct collaboration with the Hamburg Chamber of Commerce and the Hamburg Tourism Association to establish a cruise development plan, to continue its marketing efforts, to use the synergies between the three institutions and push forward policy making and conditions for cruise tourism in the city.

Recommendations for strengthening Dublin as a cruise port

A joint cruise strategy could help to maximise the potential of Dublin as a cruise port, bringing together the visions of stakeholders such as Dublin Port Company and Dublin City Council. Cruise shipping must become part of the city’s tourism agenda, in collaboration with the port. Dublin is already an attractive port for cruisers. It offers a large variety of tourist attractions, proximity of the port to the city centre as well as a close-by and well-connected international airport. Further co-operation for branding Dublin as a cruise destination would help value its assets to attract more traffic and maximise cruise benefits. Recently approved infrastructure redevelopments (Alexandra Bay Redevelopment Project) will also provide state of the art cruise berths enhancing the cruising experience. In this context, the inclusion of passenger reception facilities at the terminal needs to be considered if Dublin aims to become a turnaround port. Each actor also has individual responsibilities to strengthen the cruise strategy, with beneficial effects on the port city relationship. Dublin Port Authority should develop environmental impact mitigation measures such as assessments, incentives and greening infrastructure. Dublin City Council also has steps to take to better integrate the port into transport and spatial plans for the city, in order to reduce urban traffic bottlenecks related to cruise shipping.

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- Venice Passenger Terminal (2013), “Il coinvolgimento del Tessute Produttivo Veneziano nella Crocieristica” Riposte Turismo.

Notes

- ¹ Based on 82 cruise calls, excluding three outlier values of port stays of more than 2.5 days.
- ² The United States Customs and Border Protection (USCBP) allows US-bound passengers to undertake all immigration, customs and other inspections at Dublin before departure. Dublin Airport is also one of only airports outside North America to offer such service.
- ³ As the port is considered strategic infrastructure it is not subject to local planning permissions and requires national approval.
- ⁴ The aim of the network is to share knowledge and experience for port environmental management in Europe. It brings together port professionals from several European ports committed to exchanging views and practices and to commonly working towards the improvement of the sector's environmental performance. Each port voluntarily engages in self-regulation. EcoPorts also provides in the form of a Self-Diagnosis Method (SDM) and the Port Environmental Review System (PERS) for which Dublin Port has a certification. PERS is the only port-sector specific environmental management standard. It incorporates the generic requirements of other environmental management standards (e.g. ISO 14001 for which Dublin also has certification), yet its implementation can be independently certified. PERS aims to deliver effective port environmental management.

Cruise Shipping and Urban Development

The Case of Dublin

This report analyses Dublin's attractiveness as a cruise port and assesses the impacts of cruise shipping on the city. It evaluates policies in place and provides recommendations to increase the positive impacts of cruise shipping for the city of Dublin. Over the last decade, Dublin has grown as an important port of call for cruises in Northern Europe. Cruise tourism generates significant economic benefits for the city of Dublin. The value cruise tourism brings could be further increased by developing Dublin into a cruise home port, that is a port from which cruises start and where they end. Under which conditions could this be achieved? Which policy measures would be needed? Which stakeholders would need to be involved?

This report is part of the International Transport Forum's Case-Specific Policy Analysis series. These are topical studies on specific issues carried out by the ITF in agreement with local institutions.

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