Cork County Development Plan Review

Economy and Employment

Background Document No 6.

Planning Policy Unit
Cork County Council
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1   Section 1 Introduction

1.1   Introduction

1.1.1   This background document sets out the planning related Economy and Employment issues that need to be considered as part of the review of the County Development Plan 2014.

1.1.2   Section Two comprises a review of the strategic policies that are currently in place at a national, regional or local level which relate in general to the economy and employment.

1.1.3   Section Three reviews the current economic and employment policy of the County Development Plan 2014, the supports for economic development provided by Cork County Council and the role of the IDA and Enterprise Ireland.

1.1.4   Section Four examines the economic profile of the county using census data to look at population, current distribution of jobs, jobs by sector, future jobs growth, current employment land supply, strategic employment areas, locations of choice for future jobs growth and smart working.

1.1.5   Section 5 provides a summary overview of the many issues to be considered as part of the review of the County Development Plan.

2   Section 2 Strategic Context

2.1   National Economic Outlook

2.1.1   Nationally the economy has made a strong recovery in recent years following the recession. Unemployment has fallen from 16% in 2012 to 5.2% by Quarter 3 2019. Growth in the economy is supported by a solid pace of expansion in domestic economic activity, underpinned by continued growth in employment and real incomes, the ongoing recovery of the construction sector and growth in domestic government spending. While the outlook for the economy remains positive, growth is projected to moderate somewhat in 2019 and 2020 and is subject to heightened levels of risk and uncertainty related to the future path of the Brexit process. Projections forecast average annual employment growth of 1.9 per cent to 2020 [1].

2.1.2   In the larger sectors of the economy, Industry showed a small contraction of 0.2% in volume terms, while Information and Communications grew by 30.7% in 2018. In the sectors driven by domestic activity, Construction showed growth of 15.4% in the year and Distribution, Transport, Hotels and Restaurants grew by 4.1%. The Agriculture, Forestry and Fishing sector decreased by 12.9% in the year.[2]

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[1] Central Bank Quarterly Bulletin Q2 2019
[2] CSO Quarterly National Accounts Q4 2018

Employment Growth and Trends

2.1.3   The latest Central Bank Bulletin[3] highlights that unemployment has fallen from 16% in 2012 Q1 towards 5% in 2019 Q1, and the number of persons employed in the state has now surpassed its pre crisis peak. In addition, the Labour Force Participation Rate is now at 62.5%, similar to levels seen in the early 2000's and is in line with other EU countries. Going forward, as the economy reaches full employment, less and less new employees can be sourced from the domestic labour market as unemployment is already at a low level and the participation rate in not likely to increase significantly. Strong net inward migration will therefore be an important source of new employees to support employment growth in Ireland. During the Celtic Tiger years net inward migration was a major feature of the labour market in Ireland and as the economy has recovered there has been strong growth in net inward migration again since 2016. Companies operating in Ireland have access to a labour pool of almost 250m people across the EU[4]. Ireland will also be competing for migrant workers with other European countries who are facing similarly tight labour markets. While migration inflows can help dampen wage growth pressures in the economy it can also add to pressure in other areas such as the already congested housing market.

2.1.4   A recent study[5] of job postings in the Indeed jobs website analyses the search patterns of jobseekers located outside of Ireland actively searching for jobs in Ireland and found that, for the top ten job titles ranked by share of clicks, almost four out of every ten clicks (37%) came from outside of Ireland. For all job postings on the Indeed website around one in nine clicks (11%) comes from outside Ireland. By way of comparison, the study found that the same figures for the UK and London are 3% and 9% respectively.

2.1.5   As expected language related roles attract strong interest with up to 40% of clicks on these jobs coming from outside Ireland and around 25% from within the EU. The technology sector attracts more than one in three clicks from foreign jobseekers, approximately half of which are from within the EU. In terms of the top ten job titles ranked by share of clicks from outside the EU, healthcare, technology and jobs for architects feature prominently.

2.1.6   The CDP review will need to consider how best to position the county for jobs growth into the future, what locations are likely to be most attractive for such investment and to the migrant workers who may come to fill the jobs. Anecdotally, trends around Metropolitan Cork suggest that such migrant workers may be here on relatively short term contracts, want to retain mobility and favour living in urban locations close to good services and amenities.

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[3] Quarterly Bulletin 03 / July 2019.
[4] IDA Facts about Ireland 2018.
[5] Employment Growth: where do we go from here? Stephen Byrne and Tara McIndoe – Calder, Central Bank Quarterly Bulletin 03/July 2019.

2.2   National Policy Context

2.2.1   This section examines the provisions of recent national, regional and local policy initiatives which need to be considered as part of the review of the County Development Plan.

National Planning Framework (NPF)

2.2.2   The NPF is the Government's high-level strategic plan for shaping the future development of the country to the year 2040. The plan projects an increase in the population of the Country of over one million people in the period to 2040. The purpose of the NPF is to facilitate a shift towards Ireland's regions and cities other than Dublin by adopting a long-term framework that sets out how Ireland can move away from the current, 'business as usual' pattern of development in order to achieve 'regional parity'. The strategy aims to ensure that future population and jobs growth would be geographically more aligned.

2.2.3   In the Southern Region, the NPF is planning for between 340,000 and 380,000 additional people. This population is further distributed within the Region by the Regional Spatial and Economic Strategy which has allocated a significant amount of the region's growth to Cork City and County - 262,620 people and up to 60% of the growth. Cork's allocation is a very significant vote of confidence in the ability of the county as a whole to contribute to the sustainable growth and development of the country and the region.

2.2.4   The NPF sets out ten National Strategic Outcomes (NSO) or priorities to guide future development. These will be implemented through the Investment priorities detailed in the National Development Plan. The NSOs are as follows:

- Compact Growth,
- Enhanced Regional Accessibility,
- Strengthened Rural Economies and Communities,
- High Quality International Connectivity,
- Sustainable Mobility,
- A Strong Economy Supported by Enterprise, Innovation and Skills,
- Enhanced Amenities and Heritage,
- Transition to a Low Carbon and Climate Resilient Society,
- Sustainable Management of Water and other Environmental Resources,
- Access to Quality Childcare, Education and Health Services.

2.2.5   The NPF has set a target of planning for an additional 225,000 additional people in employment in the Southern Region to 2040 i.e. 880,000 in total. The pattern of urban growth targeted in the NPF is population and employment led, with the strategy recognising that enterprise development is drawn to urban locations by market forces such as agglomeration, migration and specialisation that depend on factors such as scale, accessibility, innovation supported by higher education institutions and quality of life. The NPF outlines the need to identify locations at an urban scale where enterprises can access competitively priced development lands, utilities and commercial properties to the highest standards. The strategy requires that regional and local authorities identify and quantify locations for strategic employment in the main cities, and

where suitable in urban and rural areas generally. The NPF indicates that when planning to accommodate strategic employment growth the following issues should be considered:

- Current employment location, density of workers, land-take and resource/ infrastructure dependency, including town centres, business parks, industrial estates and significant single enterprises,
- Locations for expansion of existing enterprises,
- Locations for new enterprises, based on the extent to which they are people intensive (i.e. employees/ customers), space extensive (i.e. land), tied to resources, dependent on the availability of different types of infrastructure (e.g. telecoms, power, water, roads, airport, port etc.) or dependent on skills availability,
- Locations for potential relocation of enterprises that may be better suited to alternative locations and where such a move, if facilitated, would release urban land for more efficient purposes that would be of benefit to the regeneration and development of the urban area as a whole, particularly in metropolitan areas and large towns.

2.2.6   The NPF also recognises that new and unexpected opportunities for enterprise development are likely to arise for particular locational reasons and regional and local planning policies should be sufficiently agile to accommodate valid propositions for enterprise development based on strong locational drivers that may emerge.

2.2.7   In rural areas creating the environment to support job creation will be a key enabler to rejuvenating rural towns and villages, sustaining vibrant rural communities and reversing population decline. The strategy also identifies the importance of implementing the following key policy objectives in order to enhance the competitiveness of the rural economy:

- Support innovation in rural economic development and enterprise through the diversification of the rural economy into new sectors and services, including ICT-based industries and those addressing climate change and sustainability,
- Facilitate tourism development and in particular a National Greenways, Blueways and Peatways Strategy,
- Support a sustainable and economically efficient agricultural and food sector, together with forestry, fishing and aquaculture, energy and extractive industries, the bio-economy and diversification into alternative on-farm and off-farm activities, while at the same time noting the importance of maintaining and protecting the natural landscape and built heritage which are vital to rural tourism,
- Support and facilitate delivery of the National Broadband Plan,
- Investment coordination together with research and innovation co-ordination.

2.2.8   The NPF also recognises that there are critical links between the quality of urban place-making and business investment / job creation. The approach in the strategy intends to ensure that an attractive range of enterprise development opportunities are provided in the face of changing employment activity and sectors.

2.2.9   **Relevance to the County Development Plan Review**: The NPF highlights the need to ensure that the economy and employment policies of the County Development Plan are fully aligned

with the National Strategic Outcomes of the NPF and promote the optimum geographical alignment between future population and jobs growth in order to ensure that Cork can successfully deliver the employment and population growth allocated to it. CDP policies need to support market forces in delivering enterprise development in urban locations and prioritise investment in urban placemaking in key employment centres to support investment and job creation.

National Development Plan (NDP)

2.2.10   The NDP sets out the investment priorities which will underpin the implementation of the NPF. The NDP incorporates a long-term (10 year) strategic approach to public capital investment, to support the achievement of the 10 National Strategic Outcomes contained in the NPF. The plan recognises the importance of making progress in linking the regions which will be a major enabler for balanced regional development to occur. In this regard, the plan includes the priority of substantially delivering the Atlantic Corridor, with a high quality road network linking Cork, Limerick, Galway and Sligo. The major projects which will act as economic enablers for Co Cork outlined in the NDP include:

- Investment at the Port of Cork providing high quality international connectivity,
- National Road projects (M20 Cork to Limerick, N22 Ballyvourney to Macroom) which will enhance regional connectivity by improving the quality of the road network,
- N28 Cork to Ringaskiddy Road, part of the Trans-European Transport Network (TEN-T), which will strengthen access routes to the Port of Cork,
- Finalisation of the CMATS (Cork Metropolitan Area Transport Strategy) in partnership with the NTA which includes proposals for a revised bus system, enhancements to the commuter rail service and which will evaluate the potential of a Bus Rapid Transit or Light Rail corridor to serve the increased population growth as envisaged by the NPF,
- Support for the role of Cork Airport as key tourism and business gateways for their regions in line with the A National Aviation Policy for Ireland 2015,
- Investment in the Cork lower harbour main drainage project which will enhance the water quality in Cork Harbour, protect the environment, facilitate economic development and providing for a growing population.

2.2.11   **Relevance to the County Development Plan Review**: Need to ensure that the land use strategies and investment priorities of the CDP are aligned with those of the NDP.

Regional Spatial and Economic Strategy (RSES) for the Southern Region

Settlement Strategy

2.2.12   The RSES sets out a 12 year strategic development framework for the delivery of the National Planning Framework within the Southern Region, and includes a Metropolitan Area Strategic Plan which covers Cork City and the County Metropolitan Strategic Planning Area.

2.2.13   A key component of the strategy is to strengthen the settlement structure of the region,

capitalising on the strength of the 3 cities and metropolitan areas, and of the network of towns, while also revitalising rural areas by repurposing the towns and villages. The RSES provides a series of thirteen guiding principles to consider when allocating future population growth and has identified the following Settlement Typology:

- **Cities and Metropolitan areas** – County Metropolitan towns of Carrigaline, Carrigtwohill, Cobh, Midleton Monard, Passage West.
- **Key Towns** – Mallow and Clonakilty
- **Towns and Villages**
- **Rural**
- **Networks**

2.2.14   The RSES recognises that the Cork Metropolitan Area is

- The principle complementary location to Dublin with a strong international role.
- A primary driver of economic and population growth in the Southern Region
- A compact city region with increased regional connectivity, focused on the delivery of sustainable transportation patterns, and
- needs accelerated urban focused growth to achieve its role and fulfil its potential.

2.2.15   The RSES indicates that population and employment growth must align with public transport investment, public transport nodal points and focus on regeneration, consolidation and infrastructure led growth of the city and suburbs, existing hierarchy of metropolitan towns and the metropolitan area's strategic employment locations.

2.2.16   Within the wider county area the RSES has identified Mallow and Clonakilty as key towns and has identified the following networks:

- *North Cork Agri-Food Network* (Charleville, Fermoy, Mitchelstown in a network with Mallow Key Town leveraging significant potential from food and beverage and agri-tech assets).
- *West Cork Marine Network*: A network based on the N71 West Cork to South Kerry Corridor across settlements of Clonakilty (Key Town), Skibbereen, Bantry, Schull and Castletownbere leveraging significant marine economy, tourism, food and beverage, digital and other assets with strategic transport connections to the Cork Metropolitan Area.
- *Cork Ring Network*: A network of Ring Towns of Mallow (Key Town), Bandon, Kinsale, Fermoy, Macroom and Youghal which have a strong relationship with the Cork Metropolitan Area and have opportunities for sustainable employment led growth, consolidation and enhancement.

Economic Strategy

2.2.17   Spatially, the economic strategy of the RSES requires employment development to follow the settlement hierarchy to deliver the greatest geographical alignment between future population and jobs growth. The economic strategy of the RSES is focused on;

- smart specialisation
- clustering
- place making for enterprise development.

2.2.18   Smart specialisation is defined by the RSES as a place-based approach that identifies strategic areas for intervention based on the analysis of the strengths and potential of the economy and on an Entrepreneurial Discovery Process with wide stakeholder involvement. The RSES highlights the importance of a bottom-up approach and collaborative platforms such as the Sub Regional Enterprise Plans and Local Enterprise Community Plans.

2.2.19   The Clustering approach aims to put in place a favourable business ecosystem for innovation and entrepreneurship in which new players can emerge and thus support the development of new industrial value chains and emerging industries. Clusters can be global or local.

2.2.20   In relation to enterprise development, the RSES identifies investment in the creation of 'place' as a key to realising regional potential. The strategy states that companies are attracted to invest in locations where they can access skills, talent and higher education and a combination of factors, such as innovation capacity, infrastructure investments, competitive services and amenities, property solutions, housing, quality of life, and access to trade and markets are critical, in order to deliver efficiencies, economies of scale and wider societal benefits.

Rural Development

2.2.21   Rural Areas, depending on their assets, remoteness and population density have different needs requiring customised solutions. A key message of the RSES is that rural areas need diversity and innovativeness to ensure economic resilience and job creation. This requires an integrated approach to rural economic development, including support for public services. The RSES seeks to expedite the completion of infrastructure servicing diverse settlements to support innovation, enterprise start-ups and competitiveness. This includes high-quality broadband and mobile communication services to all rural locations, water and wastewater facilities for the growth of settlements, sustainable energy supply, enhanced transport connectivity including rural public transport services and greenway walking and pedestrian corridors between settlements.

2.2.22   The policy objectives in the RSES relating to rural development seeks to:

- Deliver the sustainable actions under the Rural Development Programme 2014-2020,
- Drive initiatives in the Rural Economic Development Zones,
- Support innovation in rural communities,
- Encourage diversity in the rural economy.

Sectoral Opportunities

2.2.23   The RSES has identified a number of sectoral opportunities for growth within the Southern Region as set out below, all of which are represented in Cork. It is important given the constant and rapid evolution of sectors and the pervasive impact of digitalisation across the economy, that Cork is ready to adapt to emerging trends.

Table 2.1 Sector Development Opportunities in the Southern Region*	
Sector Development Opportunities in SRA	Emerging Technologies
Pharma, Bio -Pharma, Healthcare & Life sciences	Artificial Intelligence
Knowledge Economy	Internet of Things, Internet of Everything
Creative Industries	3D printing, Advanced Material and Manufacturing
ICT innovations and Smart Cities /Regions	Big Data and Data analytics
Energy	Robotics, Cobotics and Automation
Maritime	Smart City Regions
Agriculture, Food and Agri Tech	Bio-economy
Financial, Business Services and Fin-Tech	Sharing Economy
Advanced manufacturing	Digital Currencies
Leisure and Tourism	Wearable and Implantable Technologies
Technology and Research Centres of Excellence	Nano-tech
Product Prototyping	Connected Health
Education, R & D	Virtual Reality and Augmented Reality
Source RSES	

Tourism

2.2.24 Tourism is a significant sector for the Southern Region – in terms of visits, accommodation and employment. A successful tourism sector creates significant benefits for many other sectors such as agriculture, food and drinks, transport and retail. The RSES identifies tourism as a significant economic activity, both in our urban and rural areas and seeks to increase tourist numbers, support sustainable jobs through targeted rural tourism initiatives, develop activity tourism and leverage natural and built heritage assets. The development of urban tourism is a key element to growing the tourism sector. Good quality international connectivity provides opportunities in the growing market of 'city breaks' to take advantage of the tourism assets of the region, and the annual programme of festivals and sporting events.

2.2.25 The RSES recognises that tourism has a key role in terms of the economy and enhancing the quality of life for residents, workers and visitors in the Core Metropolitan Area. The RSES also acknowledges the initiatives of the Cork local authorities in advancing and diversifying the role of the vibrant tourism industry in the region under the Pure Cork brand and "Growing Tourism in Cork, A Collective Strategy".

2.2.26 The Department of Transport, Tourism and Sport's Policy Document 'People, Place and Policy Growing Tourism To 2025' projects that revenue from overseas tourism will rise from €3.5 billion in 2014 to €5 billion per year by 2025, there will be an extra 50,000 people employed in the industry and the aim is to attract ten million overseas visits to Ireland by 2025, compared to

7.6 million in 2014. The strategy also makes a number of policy proposals that are relevant to the planning of tourism including targeting high growth potential areas, incorporating cultural / sports-based offerings, respecting brand architecture / the environment and optimising international connectivity.

Digital

2.2.27   RSES states that the Local Authorities' Digital Strategies are critical for the towns and rural areas in promoting and guiding new economic opportunities arising from digital connectivity and indigenous innovation and enterprise. This complements the more traditional natural and resource assets (e.g. food,energy, tourism), which are underpinned by the quality of life offering.

2.2.28   The Cork MASP supports County Council's Digital Strategy for the County which will harness the roll out and delivery of high capacity ICT infrastructure and high-speed broadband to improve "relational proximity", where peripheral locations can interact more successfully with larger urban centres and the metropolitan area.

SMART Cities

2.2.29   The RSES discusses the Smart City as a concept to solve complex challenges and achieve policy outcomes, such as the efficient use and deployment of infrastructure and local services, increasing public safety, increasing entrepreneurial activity through the intelligent use of technology. It involves a systematic integration of ICT in planning, design, operations and management for the benefit of the citizen. Smart cities boost the location's attractiveness for people and business, especially those who want to innovate.

2.2.30   Capitalising and developing on Smart City concepts across towns and villages will require ongoing investment in broadband, fibre technologies, wireless networks and integrated infrastructure. The Metropolitan Area Networks (MAN's) for example, managed on behalf of the state and Local Authorities by ENet, require continual investment and upgrading, especially where urban focused population and employment growth is targeted. There is a need to ensure that the benefits of the Smart City concept and the lessons learned also apply to rural areas.

Atlantic Economic Corridor Initiative

2.2.31   The Atlantic Economic Corridor Initiative is referenced in the NPF as a potential enabler for the regional growth objectives of the national strategy. The NPF states that there is potential to extend its scope into other locations such as Cork City and County. The RSES seeks to strengthen regional connectivity which will enhance the integration of the Cork Metropolitan Area with the Atlantic Economic Corridor. The RSES also supports the development of strategic regional infrastructure assets connecting to this corridor. This includes enhanced connectivity between each Metropolitan Area, to the Atlantic Economic Corridor and Ten-T Corridor, to enable the efficient economic movement of freight to and from our ports and airports. The RSES has a specific objective in relation to Mallow to seek investment to support attributes and the

sustainable delivery of infrastructure including enhanced inter-regional connectivity (transport networks and digital) along the strategic road network N20/M20 corridor to the Cork and Limerick Shannon Metropolitan Areas and Atlantic Economic Corridor.

2.2.32 **Relevance to the County Development Plan Review**: The RSES provides specific population targets at County level which seeks to strengthen the settlement network while also revitalising rural areas by repurposing towns and villages. There is also a significant recognition of the importance of place making for attracting enterprise. This approach will need to be reflected in the review of the CDP. Some aspects of the economic strategy such as clustering and smart specialisation do not require a specific land use planning response, other than the identification of land for employment use which is already provided through the Local Area Plans. The emphasis on developing tourism assets and growing tourism numbers will have to be considered in light of the carrying capacity of the environment to support such intensification. This will also be considered as part of the Strategic Environmental Assessment of the Plan.

Food Wise 2025

2.2.33 Food Wise 2025 sets out a ten year plan for the agri-food sector. The strategy identifies over 400 recommendations to achieve sustainable growth and these will require a concerted and coordinated approach by primary producers, industry, Departments and State Agencies.

2.2.34 There are many well established businesses in the agri sector in Cork and the current CDP and LAP policies support such uses and their sustainable growth and expansion in accordance with normal proper planning and sustainable development considerations. This will continue as part of the review of the CDP.

Enterprise 2025 Renewed

2.2.35 *Enterprise 2025 Renewed*, Ireland's national enterprise strategy, vision is for Ireland to be the best place to succeed in business, delivering sustainable employment and higher standards of living for all. The strategy states that the fundamentals of Ireland's enterprise policy remain sound – a focus on export-led growth, underpinned by innovation and talent to drive economic growth and deliver quality jobs throughout Ireland. The strategy recognises that policy action is focused on building resilience in our enterprise base in the face of global challenges.

2.2.36 The strategy seeks to:

- Increase the emphasis on developing our Irish owned enterprises – embedding resilience in our enterprise base, enhancing productivity and delivering quality jobs – including supporting companies to navigate their way through Brexit;
- Harness the distinctive characteristics of our foreign and Irish owned enterprise mix through collaboration and clustering; Enterprise 2025 acknowledges the continued importance of FDI to Ireland.
- Place a spotlight on innovation and talent and leverage our strengths in disruptive technologies so that we achieve our ambition with more enterprises developing new

products, services and solutions to compete effectively against international competition;

- Realise the full potential of our regions through investments in place-making – developing places that are attractive for business investment and for people to live and work;

- Develop our international relationships and strengthen economic diplomacy to raise Ireland's visibility, protect Ireland's reputation and provide opportunities for our enterprises supported by the Global Footprint 2025[6] initiative.

2.2.37   The strategy recognises that the world of work is changing, the world of business investment is changing and the way of doing business globally is changing. Jobs are constantly evolving as technologies in the workplace are adopted – some jobs will be replaced by new ones while others will be redefined. We need to continually adapt if we are to take advantage of emerging opportunities and increase the productive capacity of the workforce. Building resilience and accelerating the pace at which change is implemented are key to our continued prosperity.

2.2.38   Enterprise 2025 recognises the need to plan for a more sustainable future in the context of climate change and shifting demographics and acknowledges the imperative that sustainability is driving behavioural change, technological development and policy as world economies seeks to transition to a low carbon, bio and circular economies. Ireland also needs to respond to the challenges of mitigating our emissions and adapting to the effects of a changing climate. Enterprise policy has a role in this regard in terms of embracing new technologies, supporting products and services that improve efficiency, reduces waste and delivers a higher quality of life.

2.2.39   **Relevance to the CDP Review**: In land use terms the CDP Review can support sustainable enterprise development by developing places that are attractive for business investment and for people to live and work i.e., ensuring co-ordinated timely investment in infrastructure (water services, sustainable transport, schools, housing, amenities etc) and placemaking at key locations best placed to attract and sustain investment in the long run, and evolve in response to global changes over time.

Future Jobs Ireland 2019

2.2.40   The Government has launched the Future Jobs Ireland 2019 initiative which seeks to build and prepare the economy for the jobs of the future, building resilience and putting our economy in a better place to cope with the changes and challenges ahead. The focus is on enabling the creation of high quality jobs that will allow for better standards of living, sustainable jobs that will be less vulnerable to loss, increasing productivity and labour market participation.

2.2.41   Future Jobs Ireland focuses on five pillars in the areas of:

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[6] 'Global Ireland – Ireland's Global Footprint to 2025', the Government's initiative to double the scope and impact of Ireland's global footprint in the period to 2025.

- embracing innovation and technological change;
- improving SME productivity;
- enhancing skills and developing and attracting talent;
- increasing participation in the labour force; and
- transitioning to a low carbon economy.

2.2.42   The Initiative acknowledges the pervasive impact of technology in bringing about changes in the way we work and opening up new economic opportunities. It acknowledges that some jobs will become obsolete and other new jobs will emerge requiring new and different skills. Potential opportunities are identified in cutting edge technological areas such as Artificial Intelligence, Augmented and Virtual Reality, Data Analytics, the Internet of Things and blockchain to facilitate and help companies co-innovate and develop solutions in application areas such as MarineTech, Connected and Autonomous Vehicles, Advanced Manufacturing, AgriFoodTech, and Smart Cities.

2.2.43   **Relevance of Enterprise 2025/ Regional Enterprise Plans / Future Jobs Ireland for the CDP:** Government policy points to the need to broaden the base of the economy to ensure future prosperity and resilience, using innovation to drive growth and building on our locational distinctiveness with place making strategies that acknowledge the reality of what attracts companies to invest in the area i.e. access skills, talent, higher education and a combination of factors, such as innovation capacity, infrastructure investments, competitive services and amenities, property solutions, housing, quality of life, access to trade and markets etc.

2.2.44   Current CDP and LAP policies support the growth and expansion of industrial, business and enterprise uses at a range of locations across the county in a plan led approach through the zoning of land for development, and by identifying the investment requirements in supporting infrastructure needed to facilitate such development. In many locations the Council takes a proactive approach to making sites available directly for new business. While this will continue as part of the review of the CDP, there is perhaps a need for a greater emphasis on placemaking at a number of priority locations which have the potential to attract employment growth - the main settlements of the eastern rail corridor and the Key towns of Mallow and Clonakilty, for example.

Realising our Rural Potential – Action Plan for Rural Development (2017)

2.2.45   The CEDRA[7] report on Energising Irelands Rural Economy (2014) sets out a vision for developing the rural economy and defines rural Ireland as "all areas located beyond the administrative boundaries of the five largest cities". This definition means that rural Ireland encompasses large, medium and small towns, villages and the open countryside.

2.2.46   This definition is carried forward to the Governments Action Plan for Rural Development (Realising our Rural Potential) published in 2017 which identifies five key pillars to support rural development, with associated objectives as follows:

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[7] Commission for the Economic Development of Rural Areas

1. Supporting Sustainable Communities
   ➢ Make rural Ireland a better place in which to live and work by revitalising our town and village centres.
   ➢ Enhance local services in the community.
   ➢ Empower local communities to ensure that a diversity of voices is heard and included in local decision-making processes, and that communities continue to identify their own needs and solutions.
   ➢ Build better communities through ongoing investment.

2. Supporting Enterprise and Employment
   ➢ Grow and attract enterprise and jobs through the Action Plans for Jobs and the Atlantic Economic Corridor, to promote balanced regional development. –
   ➢ Support sectoral growth – the agri-food sector, renewable energy sector, International Financial Services etc.
   ➢ Ensure rural communities have the necessary skills to meet the needs of the labour market and to encourage innovation and maximise assets.
   ➢ Support rural jobseekers.
   ➢ Support farm and fishing incomes.

3. Maximising our Rural Tourism and Recreation Potential
   ➢ Increase tourist numbers to rural Ireland by 12% by 2019.
   ➢ Support sustainable jobs through targeted rural tourism initiatives.
   ➢ Develop and promote Activity Tourism e.g. blueways, greenways, recreation etc.
   ➢ Develop and promote our natural and built heritage.

4. Fostering Culture and Creativity in rural communities
   ➢ Increase access to the arts and enhance cultural facilities in rural communities.
   ➢ Further develop and enhance culture and creativity in rural Ireland- Creative Ireland Programme.
   ➢ Promote the Irish language as a key resource.

5. Improving Rural Infrastructure and Connectivity
   ➢ Bring high speed broadband to every premises in Ireland.
   ➢ Improve rural transport links.
   ➢ Implement flood relief measures and other land management measures to protect our rural infrastructure.

2.2.47 **Relevance to the CDP Review**: All of the pillars and objectives outlined above are extremely relevant to topics which will be addressed as part of the review of the County Development Plan. The policies and objectives of the current County Development Plan and Local Area Plans already deal with many of these issues and can be further updated and adjusted as appropriate as part of the review.

Cork County Council Local Economic and Community Plan (LECP) 2017

2.2.48 The LECP is a six-year plan adopted by Cork County Council, which sets out high level goals, objectives and actions to promote and support local economic and community development within the county. The plan recognises that places that have a clear vision, offer opportunities

and are pleasant to live in, are the places where people want to live, and in turn, investment will be drawn to those places.   The LECP therefore seeks to focus on how to make Cork a high quality place to live and how to provide opportunities for residents in the context of a long-term sustainable strategy that will help underpin Cork's continued success. The plans seeks to commence a process that will lead to removal of the barriers hindering opportunity by those with the capacities to do so, in order to facilitate individuals and organisations in achieving their ambitions whether personal, economic or social.

2.2.49   The LECP is due to be reviewed early in 2020 once the Regional Spatial and Economic Plan is adopted by the Southern Regional Assembly.

Cork Metropolitan Area Transport Strategy (CMATS)

2.2.50   The Cork Metropolitan Area Transport Strategy has been developed by the National Transport Authority (NTA) in collaboration with Transport Infrastructure Ireland (TII), Cork City Council and Cork County Council. A key principle of CMATS is to reduce reliance on the private car within the metropolitan area while increasing the attractiveness of sustainable transport choices. The strategy addresses the needs of all modes of transport and seeks to coordinate land use and transportation investment in order to manage the significant increase in the demand for travel which will result from the projected 50% + growth in population, and associated growth in economic activity, in the Metropolitan Area in the period to 2040. This travel demand needs to be managed and planned for carefully, in order to safeguard and enhance Cork's attractiveness as a place to live, work, visit and invest.   The strategy provides a clear implementation plan around which other agencies involved in land use planning, environmental protection, and delivery of other infrastructure such as housing and water can align their investment priorities.

2.2.51   CMATS identifies key development priorities as follows:

(a)   Ensure effective integration between transport and land-use through the delivery of Public Transport Orientated Development, which provides higher density, a balanced mixed of land uses and compact settlements that reduce trip distances and are of a magnitude that supports the viability of high capacity public transport;

(b)   The application of this principle in Cork would support the development of a high-intensity mix of uses being directed to locations at existing or planned stations along the suburban and light rail lines and along the high frequency bus corridors;

(c)   The density of future residential and employment developments such as the Tivoli Docks and existing, centrally located and accessible settlements will be increased. Higher densities contribute to a more compact urban footprint that brings more people closer to destinations and public transport services with easy walking and cycling distance;

(d)   Deliver consolidated development in a manner that can avail of existing transport infrastructure, nearby amenities and facilities in the short term to deliver a critical mass of growth in population and employment which can support the transition and sequencing of investment to higher capacity public transport infrastructure and

services;

(e) Land use policies that minimise the requirement to travel longer distances by encouraging mixed-use development. This should include ensuring areas are developed in tandem with the delivery of schools and other amenities to maximise the use of more sustainable modes of transport; and

(f) Land use policies that support the provision and design of new development in locations, layouts and at densities which prioritise walking and cycling and enable the efficient provision of public transport services.

2.2.52 The strategy includes proposals for investment in walking, cycling, bus connects, suburban rail, light rail and roads infrastructure including:

➢ 200km new footpaths, safer routes to school and transferring 24,000 daily car trips to walking;

➢ 41km of new cycle network, transferring an additional 56,000 car trips to cycling.

➢ New bus routes, bus lanes, priority bus measures, new fleet and 6 strategic park and ride sites proposals.

➢ Rail network improvements, new suburban rail stations and improved journey times

➢ 50km of national road network improvements including upgrades to the Dunkettle Interchange, M28 Cork – Ringaskiddy, N27 to Cork Airport and Cork North ring Road and N40, and 70Km of Regional road improvements

2.2.53 **Relevance to the County Development Plan Review**: The challenge for the CDP review is to ensure that population and jobs growth is more closely aligned in areas well served by sustainable travel modes, to reduce reliance on the private car and to ensure an appropriate mix of uses, at optimum density, are delivered along public transport corridors. Within the County Metropolitan Area there is significant opportunity to deliver on the goals of CMATs within the Eastern Rail corridor.

2.2.54 **Conclusion:** A common theme throughout all current national policy and initiatives is the need to move away from the 'business as usual approach' and to recognise the vulnerabilities facing our national and local economy and prosperity in light of the climate change and local and international changes that are afoot in terms of Brexit, international tax developments, US policies, and technological change.   We need to consider how best to position Cork and the southern region nationally and internationally to enhance our resilience and our ability to compete, attract and sustain sustainable investment into the future. The role of the County Development Plan is to best position the County in land use planning terms to respond to the challenges ahead.

3   Section 3 Current Policy on Economy and Employment

3.1   Introduction

3.1.1   This section looks at the current planning policy as set out in the County Development Plan 2014 and the role of the Council's Economic Development, Enterprise and Tourism Directorate in supporting the economic development of the county.

Cork County Development Plan 2014

3.1.2   Chapter 6 of the County Development Plan 2014 sets out the Councils planning approach to the Economy and Employment. The Plan recognises that the economy of the county is broadly based and diverse in its make-up with strengths in the areas of agriculture, marine, food production, services and in technology based manufacturing in sectors such as electronics, pharmaceuticals and medical devices.

3.1.3   In terms of an overall strategy for Economic Development the Plan acknowledges that a successful county development strategy must be based on an appropriate balance of protecting existing key employment locations and the development of new locations.

3.1.4   Significant existing employment locations include the port-related, pharmaceutical and associated industries at Ringaskiddy; the manufacturing, storage and logistics related activities at Little Island; high levels of mixed-use employment at settlement locations such as Carrigtwohill and Midleton; as well as the central employment role played by Cork City. These locations have developed over many generations for reasons of geography, availability of natural assets (e.g. water), proximity to labour supply, etc. Opportunities for employment growth have been identified at Whitegate (energy related employment expansion).

3.1.5   In spatial terms the strategy supports the promotion of the Atlantic Corridor and seeks to maximise the potential of Metropolitan Cork and other county towns whilst recognising the need for diversity in rural areas.   A key element of this strategy is the concentration of new economic and employment development primarily within the main towns to bring balance across the County and improve the level of employment choice. The plan includes a hierarchy of employment centres to ensure a sustainable pattern of economic development, both in urban and rural areas. The plan recognises the need to ensure new employment opportunities are developed in tandem with the provision of transport and water services infrastructure and new housing developments so people have the opportunity to live closer to work and reduce the need for commuting.

3.1.6   The principle locations for employment development and the overall strategy appropriate to each location is set out in an Employment Hierarchy included in the current CDP, as detailed in Table 3.1 below.

Table 3.1: Cork County Employment Hierarchy		
	Principal Locations	**Overall Strategy**
Cork Gateway Locations & Mallow Hub Town	Carrigaline, Carrigtwohill, Cobh (inc. Marino Point), Little Island, Midleton, Monard, Ringaskiddy, Whitegate, Mallow.	• Strategic Employment Areas suitable for larger scale development at Carrigtwohill, Little Island, Ringaskiddy, and Whitegate. • Specialised role for Marino Point. • Ensure the advance provision of infrastructure. • Identify a choice of sites for large, medium & small enterprise/ business/industry.
Clonakilty	Clonakilty	• Enhanced employment function with a regional focus. • Infrastructure programme to service indentified supply of land for future employment development focused on medium to small business/industry.
Other Main Towns	Bandon, Bantry, Buttevant, Castletownbere, Charleville, Dunmanway, Fermoy, Kanturk, Kinsale, Macroom, Millstreet, Newmarket, Mitchelstown, Schull, Skibbereen, and Youghal	• Focus on local catchment employment. • Infrastructure programme to service indentified supply of land for future employment development focused on medium to small business/industry.
Key Villages	All Key Villages	• Focus on local catchment employment.
Rural Areas		• Support agriculture, fishing & food processing sectors. • Encourage rural diversification (especially tourism but also on and off farm employment activities such as processing of agricultural produce, manufacturing of crafts and specialist farming) and support innovation in indigenous enterprise.
Source: Cork County Development Plan 2014		

3.1.7 The Local Area Plans have zoned land in almost all of the main County towns for employment use; this includes a mixture of lands for Industrial, Business or Enterprise use. Some locations have land zoned as Special Policy Areas for specialised employment use. Across the County as a whole the land supply is detailed in Table 3.2 below. This is discussed further in Section 4.

Table 3.2: Employment Land Supply (LAPs 2017)	
Employment Zoning	Land supply ha
Industrial	1,371.4
Business	587.38
Enterprise	57.9
Special Policy Areas	420
Total	2,437.16

3.1.8   In light of the issues highlighted earlier in Section 2 in relation to national and regional planning policy (National Strategic Outcomes, compact growth, optimum geographical alignment between future population and jobs, sustainability mobility etc) and the need to build resilience in the economy, adapt to technological change and respond to climate change etc, one of the key questions for the review of the County Development Plan is whether the current employment hierarchy, and the currently supply and availability of employment land remains the optimum approach for the future in terms of attracting and sustaining investment to support economic and employment growth in the county?

3.1.9   The ability of Cork to attract and sustain investment may be strengthened by a more focused and prioritised approach to selecting a smaller number of key employment centres where job creation could be underpinned by all the necessary investment in supporting infrastructure and amenities, affordable housing and placemaking to enhance the quality of life.

3.2   Supports for Economic Development

3.2.1   In addition to the provisions of the Cork County Development Plan, Cork County Council has established an Economic Development, Enterprise and Tourism Directorate. The role of the Directorate is varied but has community and economic development at its core. The Directorate seeks to support and engage businesses and communities at a local level throughout County Cork in a number of ways including;

- Promoting Cork County as an attractive location for business to locate, grow and expand and for people to invest, work, live and visit.

- Work with local, regional, national and international partners to promote Cork, to facilitate exports and trade and the sharing of best practice.

- Support business and job creation through the work of the LEO's and tourism projects.

- Support the development of industrial and commercial infrastructure.

- Support local ratepayers through a variety of capacity raising initiatives available from the LEOs and retail and town centre initiatives.

- Public Participation Network and Age Friendly Programme

- Publication of the Local Economic and Community Plan

- Policy, Research and International Relations

3.2.2 The directorate is made up of different sections all working toward the strategic corporate objective of growing the Cork economy as follows:

(a) <u>Economic Infrastructure</u> - Provide, manage and market hard infrastructure to support the growth of start up and SMEs, support and grow the towns economies through a series of targeted interventions. This involves developing and managing industrial estates, business parks and food units for artisan food producers in 12 locations. There are also land and serviced sites for sale as well as E centres/Digital Hubs and Incubator units for start up businesses.

(b) <u>Research Policy and International Relations</u> - This area of work centres on securing maximum funding under national and international schemes to deliver initiatives in County Cork, for example agritech and biotech and cluster management model for target sectors.

(c) <u>Local Enterprise Offices </u>- The North/West and South LEOs provide financial and soft supports to the start up and SME sector in Cork. Their core activities include business information and advisory services, enterprise and entrepreneurship supports, local development supports, growing the numbers of people starting their own business, training, mentoring, financial supports, online vouchers and network development.

(d) <u>EU Projects and Economic Development</u> - The Directorate provides targeted financial support from the Economic Development Fund for strategic economic initiatives. This section also partners on EU and other co-funded projects to development best practice, develop international economic partnerships and proactively assist start up and SMEs to innovate and internationalise. Other projects include Bridge to Masschallenge Cork, Cork Smart Gateway, IGNITE (graduate business incubation programme), WSSIC and internationalisation.

(e) <u>Community Development</u> - Community Development forms a significant portion of the activities in the Directorate supporting local communities through the North South and West Local Economic Development Committees, the Social Inclusion, Community and Rural Affairs. The section also runs the Rural Development Programme 2014-20 (LEADER) as well as Comhairle na n'Og and the PPN which has over 900 community groups registered

(f) <u>Tourism Operational</u> - Tourism Operational work closely with Fáilte Ireland, Tourism Ireland and other key stakeholders in the further development of sustainable tourism in Cork. The Directorate works with Cork County Council to lead the support of Visit Cork in the promotion of Cork as a tourist destination. The section aids the Municipal Districts in further developing the Cork County Council owned Tourism attractions and development of new products and experiences. The Directorate also grows key towns tourism economies through a series of targeted interventions, supporting festival/events, marketing and raising Corks profile as a tourism destination.

(g) <u>Tourism Capital</u> - Tourism Capital is tasked with the delivery of major infrastructural projects at Cork County Council owned tourism attractions. This includes provision of engineering and project management support function, maximising funding streams for capital projects and encouraging best engineering practice in delivery of projects.

3.2.3 Work is currently ongoing on the development of an Economic Development Strategy for the County.

IDA and Enterprise Ireland

3.2.4 At a more strategic level within the County state agencies like the IDA and Enterprise Ireland have a role in encouraging investment in Cork.

3.2.5 IDA Ireland's main objective is to encourage investment into Ireland by foreign-owned companies. Cork's FDI business clusters include Life Sciences & Food, Technology and Global Business Services. The Marine & Energy cluster is growing with new marine related business and research groups.

3.2.6 Enterprise Ireland is the government organisation responsible for the development and growth of Irish enterprises in world markets. They work in partnership with Irish enterprises to help them start, grow, innovate and win export sales in global markets. In this way, they support sustainable economic growth, regional development and secure employment.

4   Section 4 County Economic Profile

4.1   Introduction

Overview of the Cork Economy

4.1.1   Economically Cork City and the wider County Metropolitan Area, with a population of circa 305,000 in 2016, is second in size only to Dublin and has significant development capacity across the city and wider metropolitan area. As a whole Cork is a high productive economy contributing 19% to National GDP[8] with significant capacity for inward investment and indigenous growth across the whole of the county.

4.1.2   The economy of the county is broadly based and diverse in its make-up with strengths in the areas of agriculture/ agri -tech, marine, food production, tourism, services, energy and in technology based manufacturing in sectors such as electronics and life sciences. The life sciences[9] sector is particularly important for Cork. The Cork Region has the largest life sciences sector in employment terms in the country with almost 10,000 permanent full time jobs in the sector in 2016[10]. Seven of the top ten global pharmaceutical companies have a presence in the county.

4.1.3   Cork has significant strengths in the agriculture and food sector and has the most people employed in agriculture in the state with a number of indigenous enterprises having a significant international presence including Dairygold and Midleton Distillery. Cork is home to the Teagasc Moorepark Animal and Grassland Innovation Centre in Fermoy which pays a central role in the development of the Irish Diary Industry as the focal point for milk production research. The value of this can be seen in the presence of Danone and Kerry Foods in Cork who together produce c8% of the world infant milk formula.

4.1.4   Tourism is also a significant part of the economy of the county in terms of employment and revenue generated. In 2017 the county received over 1.6m visitors from overseas and over 1.1m domestic visitors.[11]

4.1.5   In terms of connectivity Cork is well placed to facilitate growth. Cork Airport is Irelands second largest airport supporting in region of 4,500 jobs and contributing €306m to GDP, while the Port of Cork handles 19% of all seaborne trade in state and will have significant additional capacity once the relocation to Ringaskiddy is complete[12]. The Port also supports a dedicated cruise berth at Cobh with capacity to increase cruise liner numbers in the years ahead. Cork has hourly rail and excellent motorway connections with Dublin and good regional connectivity with the national road network.

4.1.6   Educationally the county and wider region is supported by University College Cork and Cork

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[8] Cork 2050 Report. Cork County and City Councils. 2017.
[9] Life sciences are broadly defined as compromising pharmaceuticals, bio technology and medical devices.
[10] PMCA Economic Consulting Report on Life Sciences Sector for Cork County Council 2018.
[11] Fáilte Ireland Regional Tourism Performance
[12] Cork 2050 Report. Cork County and City Councils.2017

Institute of Technology catering for approximately 35,000 students. UCC has been recognised in the top 2% of research institutions globally and CIT has been responsible for 250 start up companies in the last ten years.[13]

Background Document

4.1.7   While the above features of the county's economy will be explored further as part of the review of the County Development Plan, this section of the background document provides an overview of the jobs/ employment patterns in the county using data available from Census 2016, especially POWSCAR data on commuting which allows for an area based analysis of the number of jobs / employees in an area.   For this background paper the analysis concentrates primarily on the main settlements, as they comprise defined geographic areas and are generally the main centres of employment in an area.   For the county as a whole, the spread of jobs across the county as measured in job density by Electoral Division is illustrated in Figure 4.1.

4.1.8   Just over half (56%) of the jobs in the county are located within the 26 main settlements, with the balance being located in the villages and countryside. These jobs support the communities living in the towns, villages and open countryside across the county.

4.2   Population

4.2.1   The economy of Cork, both city and county, supports the population of the county and the wider region. The population of the region, city and county is set to grow significantly in the period to 2040 under the policies of the National Planning Framework and Regional Spatial and Economic Strategy. Growth targets provide for;

➢   24% growth in the population of the region,

➢   42% growth in the population of the county as a whole,

➢   58% growth in the city area, and

➢   31% growth in the County administrative area (new boundary)

4.2.2   Cork City and County have been allocated 60% of the population growth for the region in the period to 2040. This represents a significant economic and investment opportunity for the county as a whole. The population growth targets, for the new revised administrative boundaries, are set out in Table 4.1.

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[13] Cork 2050 Report. Cork County and City Councils. 2017.

Figure 4.1: Job Density by Electoral Division, Census 2016 (based on pre 31.05.19 administrative areas of Cork County and City)

Table 4.1: Population Growth Targets 2016-2040 (new boundaries)				
	Population based on Census 2016*	Population increase to 2026**	Population increase to 2031**	Population increase to 2040**	Population Target 2040
Cork County	332,015	45,000	66,000	104,473	436,488
Cork City	210,853	51,000	75,325	122,147	333,000
Total Cork County & City	**542,868**	**96,000**	**141,325**	**226,620**	**769,488**
Southern Region	1,585,906	234,594	342,594	379,094	1,965,000
*Source Census 2016 **Source Draft RSES				

4.3 Employment

Jobs Figures

4.3.1   In 2016 Cork County supported 118,146 jobs, an increase of 9.6% on the 2011 figure of 107,804. Cork City supported 70,427 jobs in 2016, giving a combined city and county jobs total of 188,573, equivalent to 37% of the total jobs in the Southern Region.

4.3.2   Between 2011 and 2016, Cork City and County outperformed the Region in terms of jobs growth with the total number of jobs (including persons working from home) in Cork County increasing by 9.5%, and the City increasing by 10%, while the Region saw an overall increase of 7% in the same period (Table 4.2).

Table 4.2: Jobs Figures Cork County and City* 2011 and 2016 (CSO Powscar)				
	Total jobs 2011 (excluding persons working from home)	Total jobs 2011 (including persons working from home)	Total jobs 2016 (excluding persons working from home)	Total jobs 2016 (including persons working from home)
Cork County*	94,586	107,804	104,554	118,146
Cork City*	62,760	63,807	69,058	70,427
Total County & City	157,346	171,611	173,612	188,573
Southern Region	-	471,042	-	504,401
Old Cork County and City Boundaries				

Interdependence of Cork City and County

4.3.3   Both Cork City and County have a level of economic interdependence with many people living in one area and working in the other, as illustrated in Table 4.3 and Table 4.4. While this data is

based on the pre boundary extension areas and included areas which are now part of the city, the City will remain the location of employment for many residents of Cork County into the future.

Table 4.3 Daytime working population Cork County* 2016	
People living and working in Cork County	99,256
People living in Cork City and working in Cork County	11,427
People commuting in from other counties	7,463
Total daytime working population Cork County 2016	118,146
*Old Cork City and County Boundaries	

Table 4.4: Daytime working population in Cork City* 2016	
People living and working in Cork City	27,812
People living in Cork County and working in the City	40,285
People commuting in from other counties	2,330
Total daytime working population in Cork City 2016	70,427
*Old Cork City and County Boundaries	

4.3.4   In addition, CSO 2016 data shows that, excluding those working outside the country, or with no fixed place of work, or where the place of work was not stated, 7,581 residents of County Cork left the county for work every day in 2016 - 6,708 residents of the county and 873 residents of the city. In contrast, 9,793 people commuted into the County for work, 7,463 people to the county and 2,330 to the city, so there was a net inflow of 2,212 employees.

4.3.5   The economic interdependence of the city and county is likely to continue into the future. Table 4.6 shows the potential for 135,972 additional jobs in the city and county to 2040. Many of these new employees may chose to live in one area and work in the other.

People working from home

4.3.6   In 2016 11.5% of jobs in County Cork (jobs in towns and rural areas) were occupied by people who work from home.

	Persons working from home 2011	Total jobs including persons working from home 2011	% of jobs occupied by people working from home 2011	Persons working from home 2016	Total jobs including persons working from home 2016	% of jobs occupied by people working from home 2016
Table 4.5: Jobs Occupied by Persons Working from Home, 2011 & 2016						
Cork County	13,218	107,804	12.3	13,592	118,146	11.5

4.3.7   There has been a fall in the percentage of jobs occupied by people working from home. The highest percentage of people working from home is within Metropolitan Cork Strategic Planning Area towns.

Future Jobs Growth

4.3.8   The growth in population in the region and county is to be lead by growth in jobs. The National Planning Framework and RSES set out a future population to jobs ratio of 1: 0.6. Indicative new jobs figures for the County and City for 2026, 2031 and 2040 have been calculated by applying this ratio of 1: 0.6 to the population growth targets. Application of the ratio suggests that, in the region of 18, 000 additional jobs could emerge in the County Metropolitan Strategic Planning Area in the period to 2031, while an additional 20,000 jobs could emerge in the remainder of the County, and up to 45,000 in the city area over the same period.

Table 4.6: Job Growth Targets 2016-2040						
	Population based on Census 2016	Jobs 2011*	Jobs 2016*	Growth in Jobs 2026	Growth in Jobs 2031	Growth in Jobs 2040	Jobs Target** 2040
County Metro Area **	94,553	26,557	31,892	12,000	18,000	29,684	61,576
Remainder of Cork County**	237,462	46,326	49,446	15,000	21,600	33,000	82,446
Total Cork County **	332,015	72,883	81,338	27,000	39,600	62,684	144,021
Cork City**	210,853	84,463	92,274	30,600	45,195	73,288	165,562
Total County / City	**542,868**	**157,346**	**173,612**	**57,600**	**84,795**	**135,972**	**309,583**

* Jobs are based on a count, from 2016 Census POWSCAR, of Place of Work points within the 2017 LAP settlement development boundaries and it excludes people working from home. The Place of Work points have been rounded to the centre of the 250M X 250M grid square in which the place of work is located – as such there may be some Place of Work points which lie just outside the boundary but are included in the count and there may be some Place of Work points which lie just inside the boundary but are excluded from the count.
**Revised Boundary

4.3.9   At a Strategic Planning Area level potential future jobs are detailed in Table 4.7. Both the NPF and the RSES provide guidance on where these new jobs should be located, which is discussed later in this document.

4.3.10   As outlined in section 2.1.4, a strong net inward migration is likely to be an important source of new employees to fill additional jobs into the future, adding to the demand for housing.

Table 4.7 Indicative Jobs Growth Targets by SPA to 2040	
Strategic Planning Area	**Growth in jobs to 2040 (ratio of people to jobs = 1:0.6)**
County Metro	29,683
Greater Cork Ring	17,160
North	7,260
West	8,580
Total New County	62,683
New City	73,288

Distribution of Jobs

4.3.11   The National Planning Framework and Regional Spatial and Economic Strategy highlight the importance of building accessible centres of scale in order to build a stronger region and capture economic growth.

4.3.12   Using data from Census 2016, an analysis of the spread of jobs across the county as a whole, and within the Main Settlements, has been undertaken.   Table 4.8 shows the distribution of jobs within the Strategic Planning Areas pre and post extension of the city boundary. While the boundary change has resulted in the County Metropolitan Area having a reduced proportion of the jobs in the county, this will increase again over time in line with the provisions of the NPF and RSES and the jobs growth outlined in Table 4.6.

Table 4.8 Distribution of Jobs by Strategic Planning Area 2016				
	Pre boundary change		**Post boundary change**	
SPA	**No of jobs**	**%**	**No of jobs**	**%**
County Metropolitan Cork	58,369	49	33,674*	36
Greater Cork Ring	29,162	25	29,162	31
North Cork	14,105	14	14,105	15
West Cork	16,510	12	16,510	18
Total	**118,146**	**100**	**93,451**	
*estimated number of jobs.				

4.3.13 Within the county as a whole, prior to the boundary change, 58% of the jobs were located within the 31 main settlements of the county. Post the boundary extension the number of main settlements has been reduced to 26, and they accounted for 56% of the 2016 jobs. The CDP review must consider the most sustainable locations for attracting new jobs into the future, having regard to the NPF requirements to achieve greater geographic alignment between jobs and housing and the need to reduce the need to travel and increase the use of sustainable travel modes.

Table 4.9: Distribution of Jobs Cork County 2016		
Employment Location	Jobs 2016 Pre boundary	Jobs 2016 Post boundary
Cork County	118,146	93,451
Cork County – Main Settlements	68,612	52,583
Cork County – Balance including villages and rural	49,534	40,868

4.3.14 Figure 4.2 illustrates the distribution of jobs across the main settlements of the county.   The largest employment centre is Little Island, followed by Mallow and Ringaskiddy. In contrast to Cork City for example, which has almost 70,000 jobs in a relatively compact area, jobs in the county are very widely distributed with only one location, Little Island, having more than 5,000 jobs while a further nine locations have between 2,000 and 5,000 jobs.

4.3.15 Figure 4.3 illustrates the relative position between population and jobs levels in each of the main towns, while Table 4.10 shows the jobs to resident workers ratio for each town, both of which can be indicators of sustainability.

4.3.16 As only a portion of the population of any town will be in the labour force, a close match between the size of the population and the number of jobs is not expected but the closer the match, the more sustainable a location would be. The NPF suggests that in terms of the *jobs to resident workers ratio*, a ratio of 1.0 means that there is one job for every resident worker in a settlement and indicates balance, although not a match, as some resident workers will be employed elsewhere and vice-versa. Ratios of more than 1.0 indicate a net in-flow of workers and less than 1.0, a net out-flow. The extent to which this ratio is greater or less than 1.0, is also generally indicative of the extent to which a town has a wider area service and employment role, rather than as a commuter settlement.

4.3.17 A town like Cobh, which has lost most of its traditional industrial jobs and now functions largely as a commuter town for the city, and has seen a growth in commuter housing development in recent years, has a relatively large population and relatively few jobs. Cobh has a job to resident worker ratio of 0.28 which means it has only 0.28 of a job for each worker living in the town, meaning most people have to leave the town each day for work.

Figure 4.2: Jobs Profile 2016

Total Number of Jobs 2016

■ Total Number of Jobs (excluding working from home)

Settlement	Total Number of Jobs
Little Island	7,955
Mallow	4,491
Ringaskiddy-Loughbeg	3,825
Carrigtwohill	3,782
Midleton	3,676
Carrigaline	2,881
Fermoy	2,608
Charleville (Rathluric)	2,466
Bandon	2,351
Clonakilty	2,313
Bantry	1,874
Mitchelstown	1,805
Skibbereen	1,767
Youghal	1,717
Macroom	1,645
Kinsale	1,548
Cobh	1,372
Millstreet	1,164
Kanturk	802
Dumanway	721
Castletownbere	677
Newmarket	427
Whitegate/Aghada	398
Passage West	281
Schull	244
Buttevant	203

*POWSCAR DATA Census 2016: Settlement (Local Area Plan Boundary)

Figure 4.3: Population/ Jobs Profile – 2016

Jobs and Population Profile 2016

■ Total Number of Jobs (excluding working from home)   ■ Population (Census 2016)

Town	Jobs	Population
Little Island	7,955	1,335
Mallow	4,491	12,459
Ringaskiddy-Loughbeg	3,825	580
Carrigtwohill	3,782	5,080
Midleton	3,676	12,496
Carrigaline	2,881	15,770
Fermoy	2,608	6,585
Charleville (Rathluric)	2,466	3,919
Bandon	2,351	6,957
Clonakilty	2,313	4,592
Bantry	1,874	2,722
Mitchelstown	1,805	3,740
Skibbereen	1,767	2,778
Youghal	1,717	7,963
Macroom	1,645	3,765
Kinsale	1,548	5,281
Cobh	1,372	12,800
Millstreet	1,164	1,555
Kanturk	802	2,350
Dumanway	721	1,655
Castletownbere	677	860
Newmarket	427	976
Whitegate/Aghada	398	2,184
Passage West	281	5,843
Schull	244	700
Buttevant	203	970

Population: Census Town Boundary 2016 - Jobs: LAP Town Boundary POWSCAR 2016

4.3.18   Smaller towns located away from the commuter influence of the city, often have a better balance of population and jobs. Some towns, like Bantry and Charleville have more jobs within the town than workers living in the town to fill them, so they draw workers in from a wider catchment area, either just outside the town or further afield. In general, more peripheral towns with limited job opportunities will find it harder to attract additional population.

4.3.19   Both the NPF and the RSES point to the need for transformational change in the pattern of development in the future, for population growth to be jobs led, and for the population and jobs growth to be more closely aligned geographically, to reduce the need to travel and support sustainable growth. Growing the population of settlements to achieve the critical mass needed to compete for investment and attract new businesses is also very important.

4.3.20   The CDP review needs to consider how best the population allocation in the Core Strategy, and the land use and other policies of the Plan, can respond to these challenges and optimise the economic opportunities to deliver sustainable growth.

Table 4.10 Jobs to Resident Workers 2016				
Settlement*	Population 2016	Jobs 2016	No. of Resident Workers	Jobs to Resident Workers
Bantry	2,722	1,748	1,005	1.739
Charleville	3,919	2,249	1,464	1.536
Skibbereen	2,778	1,580	1,058	1.493
Castletownbere	860	508	374	1.4
Newmarket	976	517	384	1.346
Clonakilty	4,592	2,376	1,840	1.291
Dumanway	1,655	758	622	1.219
Schull	700	302	249	1.213
Ringaskiddy	929	433	358	1.209
Mitchelstown	3,740	1,480	1,412	1.048
Macroom	3,765	1,548	1,569	0.987
Kanturk	2,350	829	937	0.885
Millstreet	1,555	601	682	0.881
Fermoy	6,585	2,168	2,617	0.828
Bandon	6,957	2,334	2,868	0.814
Kinsale	5,281	1,737	2,140	0.812
Mallow	12,459	3,775	4,760	0.793
Midleton	12,496	3,871	5,194	0.745
Youghal	7,963	1,768	2,718	0.650
Buttevant	970	212	332	.639
Carrigtwohill	5,080	931	2,345	0.397
Cobh	12,800	1,432	5,098	0.281
Carrigaline	15,770	1,849	6,901	0.268
Whitegate / Aghada/ Farsid /Rostellan	2,184	184	913	0.202
Passage West	5,843	446	2,504	0.178
*Census Towns **Note:** Data in this table is based on the Census Town. Some locations like Ringaskiddy have additional jobs located in the area outside the boundary as defined by the Census, but within the boundary defined by the LAP, which are **not** reflected in this table.				

Jobs by sector

4.3.21   Within Cork County; Wholesale, Retail, Trade and Transport is the largest employment sector accounting for 26% of persons at work, followed by Manufacturing at 21%. Just 8% of persons at work are engaged directly in Agriculture, Forestry and Fishing. The proportion of people employed in Manufacturing in Cork is significantly above the national figure which reflects the dominance of manufacturing in areas like Ringaskiddy where there is a large pharma industry presence.

Table 4.11: Percentage breakdown of jobs by industrial group		
Census 2016 POWSCAR – Industrial Group	% National Employees*	% Cork County Jobs (incl. home workers)
Agri, Forestry and Fishing	5%	8%
Manufacturing	11%	21%
Build and Construction	5%	4%
Wholesale, Retail, Trade, Transport	23%	26%
Information and Communications	19%	16%
Public Administration	5%	3%
Education, Human Health & Social Work Activities	20%	17%
Other	4%	4%
Unstated	8%	1%
Total	1,970,728	118,146
*note national employees includes 2,763 employees who work outside Ireland and who have a place of work that is therefore not in Ireland. However there may also be a number of people resident outside Ireland who have a place of work in Ireland – these are not included in POWSCAR.		

Rural Economy

4.3.22   As noted in Section 2 of this report the CEDRA[14] report on Energising Ireland's Rural Economy (2014) defines rural Ireland as "all areas located beyond the administrative boundaries of the five largest cities". This definition means that rural Ireland includes large, medium and small towns, villages and the open countryside. This definition is carried forward to the Governments Action Plan for Rural Development (Realising our Rural Potential) published in 2017.

4.3.23   In this context it is considered that the rural economy of County Cork includes the towns, villages and open countryside. Jobs in the towns have been discussed earlier in this paper. Within the countryside, employment in agricultural and other resource based activities such as forestry, fishing ,tourism, marine activity, recreation or energy are particularly important. Working from home, whether that home is in a town or village or in the countryside, and the opportunities for Smart working, as shown by initiatives such as the Ludgate hub in Skibbereen town, are examples of initiatives which can help support the rural economy into the future, offering an alternative to city based employment and allowing people to work closer to where they live with good digital connectivity to the wider economy. Smart working is dealt with further below.

4.3.24   In line with the Action Plan for Rural Development the County Development Plan will include measures to address the five key pillars of the Action Plan i.e., supporting sustainable

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[14] Commission for the Economic Development of Rural Areas

communities, supporting enterprise and employment, maximising our rural tourism and recreational potential, fostering culture and creativity and improving rural infrastructure and connectivity.

4.4 Employment Lands

4.4.1   Across the County, lands for employment use are provided within the main settlements through the formal zoning of land. Land is provided in the main settlements so it can be appropriately serviced, be located close to where people live and business can benefit from proximity to other businesses and services. Employment uses also exist in the villages and open countryside and planning policy supports the continued growth and development of such existing uses.

4.4.2   Table 4.12 shows the zoned employment land supply in the main towns throughout the county. The employment land supply is divided into Industry, Business, Enterprise and Special Policy Areas (SPAs) and the County Development Plan outlines what types of development are suitable in each category (see Appendix B).

4.4.3   Ringaskiddy has the largest industrial land bank at 269ha, followed by Whitegate / Aghada at 248ha, Carrigtwohill at 174ha and Mallow at 147ha. Little Island has 91ha zoned for industrial use, while Mitchelstown has 76ha. In terms of land zoned for business, Charleville has the largest land supply at 60ha, followed by Carrigtwohill at 54ha, Bantry at 52ha and Bandon at 45ha.

Table 4.12: Employment Land Supply – Main Towns Cork County by Strategic Planning Area					
Main Town	**Industry**	**Business**	**Enterprise**	**Special Policy Area**	**Total**
Metropolitan Cork					
Carrigaline	-	9.7	-	-	9.7
Carrigtwohill	174.2	54.1	-		228.3
Cobh	-	16.2	-		16.2
Little Island	91.1	-	-	32.4	123.5
Midleton Environs	48.2	28.4	46.4		123
Passage West	0	0	0	0	0
Ringaskiddy **	361.32	-	-	-	361.32**
Whitegate and Aghada	248.4	-	-	388	636.4
Total	**923.32**	**108.4**	**46.4**	**420.4**	**1498.42**
Greater Cork Ring					
Bandon	18.4	45.57	-	-	63.97
Fermoy Environs	33.5	28.38	-	-	61.88
Kinsale	5.7	19.1	-	-	24.8
Macroom	16.8	12.2	-	-	29.0
Mallow Environs	147.35	23.46	-	-	170.81
Youghal Environs	38.5	28.2	-		66.7

Table 4.12: Employment Land Supply – Main Towns Cork County by Strategic Planning Area					
Main Town	**Industry**	**Business**	**Enterprise**	**Special Policy Area**	**Total**
Total	**260.25**	**156.91**	**0**	**0**	**417.16**
North Cork					
Buttevant	-	14.6	-	-	14.6
Charleville	27.9	59.8	-	-	87.7
Kanturk	-	44	-	-	44
Millstreet	-	25.7	-	-	25.7
Mitchelstown	76.81	29.21	-	-	106.02
Newmarket	-	12.4	-	-	12.4
Total	**104.71**	**185.71**			**290.42**
West Cork					
Bantry	36.1	52	-	-	88.1
Castletownbere	21.3	18.6	-	-	39.9
Clonakilty Environs	8	10.9	11.5*	-	30.4
Dunmanway	7.6	8.9	-	-	16.5
Schull	1	6.6	-	-	7.6
Skibbereen Environs	9.3	39.36	-	-	48.66
Total	**83.3**	**136.36**	**11.5**		**231.16**
Total	**1371.48**	**587.38**	**57.9**	**420.4**	**2437.16**
Shannonvale **Gross figure for Ringaskiddy is 361.32. Approximately 96ha already development, leaving a balance of approx. 269ha.* (RY 1-18)					

4.4.4   As Table 4.12 shows, there are wide variations in the amount of land zoned for Industrial, Business and Enterprise use across the main settlements. As part of the review of the CDP and the development of the Core Strategy, the suitability of this employment land supply will need to be considered.

4.4.5   In the new County Metropolitan Cork, for example, there is 8 times more land zoned for industry than for business, with Metropolitan Cork having more than twice the amount of industrial land than the rest of the county combined. In addition, Metropolitan Cork has only 23% of the business land supply for the county and Midleton is the only location within Metropolitan Cork with land zoned for Enterprise use.

4.4.6   Passage West is unique in having no land zoned for employment use and the town recorded just 281 jobs in 2016. The site of the existing scrap metal industrial use on the quay in the centre of the town is zoned as a Special Policy Area for a mix of uses to encourage its redevelopment, which could include some office based employment uses. The town serves mainly as a commuter town for the City and wider harbour area. Given their populations, Cobh and Carrigaline also have comparatively small amounts of land zoned for employment use.

4.4.7   As a Strategic Employment Area, Little Island has a relatively small amount of land zoned for employment uses, as most of the land there is now classified as part of the 'existing built up

area'. Given the strategic importance of Little Island as the largest employment centre outside of Cork City, and the impact of development there on the national road network, consideration needs to be given to whether this approach will best serve the strategic employment needs of Cork, and the Region, into the future.

4.4.8   Within the Greater Cork Ring, the land supply in Mallow is more than double that of the other towns but includes the site of the former sugar factory which is now vacant. Mallow also has a significant land bank at Quartertown. The supply in Macroom and Kinsale is lower than the other towns. Macroom has a strong *Jobs to Resident Workers Ratio* of 0.987, and as the closest town west of the City with a bypass on the way, may require additional zoned lands as its population increases into the future.

4.4.9   In both North and West Cork the amount of business land exceeds the amount of land available for industry. In some areas the amount of land zoned may well exceed requirements and mitigate against compact growth and sustainable travel, while other areas like Clonakilty, identified as a Key Town under the RSES, may potentially have insufficient land zoned for employment use.

4.4.10   One of the ways to encourage compact growth and reduce the need to travel is to make greater provision for more mixed use areas. The current approach to employment zoning may need review in this context.

4.4.11   Consideration will need to be given to the existing employment land use definitions to determine if these definitions are still appropriate or if they need to be updated and redefined.

4.5   Strategic Employment Areas

4.5.1   A key feature of the County Development Plan is the identification of *Strategic Employment Areas* within the Cork Metropolitan Area. Carrigtwohill, Little Island, Ringaskiddy and Whitegate are identified as strategic employment areas suitable for large scale employment development (large standalone uses which require significant amounts of land). In recognising the strategic employment role of these locations, the County Development Plan also commits to protecting them from inappropriate development that may undermine their suitability.

4.5.2   Ringaskiddy is long established as a location for industrial / chemical / pharmaceutical/ port related uses, supported by deep water port facilities and ferry services. The IDA has supported the development of many high technology manufacturing plants in the area. Ringaskiddy also includes the villages of Shanbally (2016 population 349) and Ringaskiddy/ Loughbeg (2016 population 580). There are advanced plans to upgrade the N28 serving Ringaskiddy to motorway standard and there are 361.32ha of land zoned for industrial use.

4.5.3   Ringaskiddy and Marino Point are identified as locations suitable for accommodating uses which need to relocate from the City to facilitate the re-development of the Docklands.

4.5.4   Little Island is also a long established employment centre although its traditional focus on heavy industry / manufacturing and warehousing / logistics has changed in more recent times to include more small and medium sized business uses, offices and retail warehousing. Little

Island has a small local population of 1,335. Little Island also has 91ha of greenfield land available for industrial use.

4.5.5 Whitegate has a specialist role in the storage and processing of strategic energy resources being home to three power stations and an oil refinery. There are 248ha of land available for future industrial development in Whitegate. Whitegate has a nationally important role in the energy sector and is a preferred strategic location for expansion in this area.

4.5.6 Carrigtwohill has also developed into a significant employment location with many IDA backed businesses in the area. In more recent years the population of the town has grown significantly as a commuter town for Cork City and the wider hinterland, with the reopening of the rail line to Midleton and the availability of a commuter rail service. Significant future population growth is planned for Carrigtwohill to 2040.

4.5.7 Table 4.13 below shows the relative number of jobs in each Strategic Employment Area, with Little Island being the largest jobs centre in the county area by a significant margin.

Table 4.13: Total Jobs (places of work) by Main Strategic Employment Areas* 2011, 2016				
Location	2011	2016	Increase/Decrease	%
Little Island	5,693	7,955	2,262	28%
Ringaskiddy	3,150	3,825	675	18%
Carrigtwohill	2,913	3,782	869	23%
Whitegate	430	398	-32	-7%
Total	12,186	15,960		
*jobs numbers within the LAP settlement boundary				

4.5.8 The strategic and larger scale of the uses in the different Strategic Employment locations is also evident from the comparative number of business in each area, as evidenced by geodirectory data as shown in Table 4.14.

Table 4.14: Number of Commercial Addresses Geodirectory 2018	
Settlement	No. of Commercial Premises
Whitegate	58
Ringaskiddy	86
Carrigtwohill	267
Little Island	586

Employment by Industrial Groups

4.5.9 The different role of each of the Strategic Employment Locations is evident in the relative breakdown of the numbers of people at work by each industrial group - see in Table 4.15. Ringaskiddy has the strongest focus on manufacturing for example, followed by Carrigtwohill and Little Island, while Carrigtwohill and Little Island have a significant share of the transportation sectors. Little Island is strong on professional services, as evidenced by the

growth in office accommodation there in recent decades.

Table 4.15: Percentage Breakdown of Jobs by Industrial Group						
Census 2016 POWSCAR – Industrial Group	National* Employees	Cork County Jobs (including home workers)**	Carrigtwohill	Little Island	Ringaskiddy	Whitegate***
Agri, Forestry and Fishing	5	8	0	1	0	0
Manufacturing	11	21	36	19	87	1
Build and Construction	5	4	6	3	1	67
Wholesale, Retail, Trade, Transport	23	26	26	30	3	4
Information and Communications	19	16	27	15	5	14.5
Public Administration	5	3	1	1	.5	2.5
Education, Human Health and Social Work Activities	20	17	2	27	3	5
Other	4	4	1	3	0	5
Unstated	8	1	1	1	0.5	1
Total	**1,970,728**	**118,146**	**7,955**	**931**	**3,825**	**398**

*note national employees includes 2,763 employees who work outside Ireland and who have a place of work that is therefore not in Ireland. However there may also be a number of people resident outside Ireland who have a place of work in Ireland – these are not included in POWSCAR.
** Place of Work in County Cork
***Whitegate figures calculated using the LAP boundary

Employment by Socio Economic Groups

4.5.10   The different role of the each of the Strategic Employment Locations is again evident in the breakdown of the numbers of jobs by Socio Economic Group as set out in Table 4.16. Ringaskiddy has the highest percentage breakdown of professional jobs, in the higher and lower categories combined, at 41%, followed by Whitegate, Carrigtwohill and Little Island. Little Island has the highest number of Employers and Managers which is to be expected given it has the highest number of commercial premises according to the 2018 Geodirectory (see table 4.14). Little Island, Ringaskiddy and Whitegate have a similar percentage breakdown of jobs in the manual skilled and semi-skilled jobs while Ringaskiddy has by far the lowest percentage of jobs (7%) in the non-manual jobs category.

Census 2016 POWSCAR – Socio Economic Group	National Employees*	Cork County Jobs** (including home workers)	Carrigtwohill	Little Island	Ringaskiddy	Whitegate***
Table 4.16 **Percentage Breakdown of Jobs by Socio Economic Group**						
Employers and Managers	15	15	18	20	14	12
Higher Professional	8	8	6	13	21	11
Lower Professional	16	15	21	11	20	19
Non- manual	25	24	23	18	7	17
Manual Skilled	8	9	11	20	6	18
Semi-skilled	9	13	13	16	28	17
Unskilled	3	3	2	1	1	2
Own account workers	5	3	4	1	1	2
Farmers	4	7	0	0	0	1
Agricultural Workers	1	1	0	0	0	0
All others gainfully occupied and unknown	6	2	2	0	2	1
Total	**1,970,728**	**118,146**	**7,955**	**931**	**3,825**	**398**

* note national employees includes 2,763 employees who work outside Ireland and who have a place of work that is therefore not in Ireland. However there may also be a number of people resident outside Ireland who have a place of work in Ireland – these are not included in POWSCAR.
**Place of Work in County Cork
***Whitegate figures calculated using the LAP boundary

Travel to work

4.5.11 Across the county as a whole there is a huge reliance on the private car as a means of getting to work. As referenced earlier, both the NPF and the RSES point to the need for population growth to be jobs led, and for the population and jobs growth to be more closely aligned geographically, to reduce the need to travel and support sustainable growth and use of sustainable modes of travel. Table 4.17 provides a comparative summary of means of travel to work in three of the Strategic Employment Areas; Little Island, Carrigtwohill and Ringaskiddy. Little Island shows the highest percentage use of sustainable modes of transport by employees which is to be expected given its proximity to the Cork – Midleton railway line however there is very little difference between all three employment areas with all of them showing a significant reliance on the car as a means of travel.

Table 4.17: Summary Means of Travel to Work- 2016 Comparison*				
	County	Little Island	Carrigtwohill	Ringaskiddy
Sustainable Modes				
On Foot, Bicycle, Bus, Train	11%	5%	3%	2.5%
Private Vehicles				
Driving Car	77.5%	83%	89%	92%
Motorcycle	.5%	1%	1%	.5%
Passenger in Car	5%	4%	4%	1%
Work Vehicles				
Van	5.5%	6%	3%	2.5%
Other means/Not Stated	.5%	1%	0%	1.5%
Total Jobs	104,553**	7,955	3,782	3,825
*POWSCAR data				
**Commuting Employees Travelling to Jobs in Cork County				

4.6   Locations of choice for future jobs growth

4.6.1   The NPF requires Local Authorities to identify and quantify locations for strategic employment development, where suitable, in urban and rural areas. The pattern of urban growth targeted in the National Planning Framework is population and employment led, recognising that firms and enterprise development are drawn to urban locations by market forces such as agglomeration, migration and specialisation that depend on factors such as scale, accessibility, innovation supported by higher education institutions and quality of life.

4.6.2   Cork's ability to achieve the expected level of job creation is subject to its capacity to accommodate it. The NPF notes that sustainable enterprise thrives in supportive business environments that enhance competitiveness and productivity with good supporting infrastructure. There are also critical links between the quality of urban place-making and business investment/ job creation. Place-making is identified as a key differentiator in Enterprise 2025, Ireland's National Enterprise Policy 2015-25. The NPF strategy is to focus a significant proportion of population growth in Ireland's Cities and towns, while also seeking to improve urban infrastructure and amenities, liveability / quality of life and the quality of the built environment. This approach intends to ensure that we continue to provide an attractive range of enterprise development opportunities in the face of changing employment activity and sectors. At an urban scale, in cities and towns generally, it is important to identify locations where enterprises can access competitively priced development lands, utilities and commercial properties to the highest standards available internationally.

4.6.3   In more rural locations, defined by the NPF as towns, villages and countryside with less than 10,000 population, the NPF recognises that job creation is key to rejuvenating rural towns and villages and the diversification of the rural economy is essential to create jobs and build resilience. Sectors offering particular opportunities into the future are agriculture, food, forestry, tourism, renewable energy, ICT, multi-media, creative sectors and the bio / circular

economy. The development of micro enterprises (those with less than 10 employees) is seen as particularly relevant to the rural economy, and all towns should have the space to accommodate such uses as part of their compact growth objectives.

4.6.4   The Regional Spatial and Economic Strategy also recognises the trend toward urban areas of scale and concentrations of economic activity and identifies several key elements which inform business location choices, as follows;

> Critical mass in population,

> Connectivity and Accessibility,

> World class economic infrastructures and competitive services with capacity, resilience and quality;

> Third level infrastructures, access to skills and to research, development and innovation;

> Availability of property solutions – including 'ready-to-go' commercial properties, 'landing spaces', co-working spaces and flexible property solutions and affordable housing;

> Competitive, smart and integrated public transport networks within and between cities and urban areas;

> Co-location or dynamic clustering plays a role – for example, in the agri-food sector, enterprises will seek to locate close to local suppliers of produce. Enabling connectivity and linkages within and between suppliers and purchasers, between enterprises and Higher Education Institutes is an important consideration for the NPF; and quality of life factors and sense of place.

4.6.5   In terms of identifying locations for new strategic employment development the RSES has identified the following guiding principles/issues to consider:

> Location of Technology and Innovation Poles (IoTs and Universities), as key strategic sites for high potential growth of economic activity;

> Current employment location, density of workers, land-take and resource/infrastructure dependency, including town centres, business parks, industrial estates and significant single enterprises;

> Locations for expansion of existing enterprises;

> Locations for new enterprises, based on availability of employees/customers, land, tied to resources, dependent on the availability of different types of infrastructure (e.g. telecoms, power, water, roads, airport, port etc.) or dependent on skills availability;

> Locations for potential relocation of enterprises that may be better suited to

alternative locations and where such a move, if facilitated, would release urban land for more efficient purposes that would be of benefit to the regeneration and development of the urban area as a whole, particularly in metropolitan areas and large towns;

➢ Within large urban areas locations where significant job location can be catered for through infrastructure servicing and proximity to transport interchanges, particularly public transport;

➢ Environmental considerations including but not limited to designated European Sites, Flood Risk, Biodiversity, Cultural Heritage and landscape; and

➢ An assessment of the phasing of development in association with the planned delivery of water and waste water services, extension or provision of public bus services to the location and provision of new or improved cycling and walking connectivity from existing residential areas.

4.7 Smart Working

4.7.1 Smart working is the combined use of technology with flexibility and agility for employees to work from home, from a hub or using a hybrid model (part-home, part-office).

4.7.2 The growth of digital hubs and smart working is making a significant contribution to the renaissance of regional towns and is helping to alleviate urban migration and slower regional economic recovery. Access to smart working opportunities means that businesses can now be based in any location, retain local skills, knowledge and talent, and compete on a level playing field with national and international organisations[15].

4.7.3 In Cork the E Centres Initiative is a network of Community Enterprise Centres established by Cork County Council in partnership with local business organisations and state enterprise agencies, to support start-ups, entrepreneurs and remote workers among others, in order to provide dedicated co-working facilities such as hot-desking, offices, training centres, conference and meeting facilities and other services to support businesses and communities in the Cork region.

4.7.4 There are currently 10 E centres throughout Cork County. One such example is the Ludgate Hub in Skibbereen which aims to facilitate the creation of 500 jobs and 1000 indirect jobs by 2020. The Ludgate Hub team have created a digital strategy for the area which aims to bridge the rural-urban divide by giving back to rural communities which have been adversely affected by unemployment and emigration.
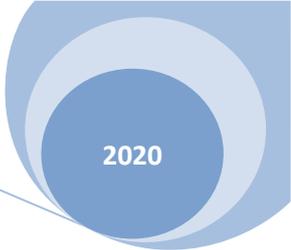
4.8 Data Centres

4.8.1 Data centres are facilities that house computers, storage devices, telecommunication systems, cooling systems and power backups used by organisations for the storage, management and dissemination of its data. Data centres need resilient power and fibre connectivity.

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[15] Smart Working Stimulating Regional Economic Growth – A Socio-Economic Analysis of Smart Working - Vodafone

4.8.2   In October 2017, the Government agreed to a strengthened Strategic Policy Framework for the continued development of data centres in Ireland, as part of objectives for wider economic growth and regional development. The aim of this plan-led approach was to allow Ireland to optimise the benefits that these strategically important investments can bring to society and ensure that Ireland continues to be an attractive and competitive location for digital economy investments.

4.8.3   The Government Statement on the Role of Data Centres in Ireland's Enterprise Strategy 2018 also outlines how the development of data centres contributes to enterprise and regional policy objectives and is a strategically important element of Ireland's future economic prospects.

4.8.4   A planning policy framework document on data centres has been included in **Appendix D** of this document and proposes that the next County Development Plan should include policy guidance for Data Centres, including site selection criteria.

5 Section 5: Conclusion and Key issues for the Review of the County Development Plan

5.1.1 Section Two of this report has highlighted the key provisions of National and Regional Planning Policy and the government's approach to supporting the economic development of the country going forward. The NPF has set a target of planning for an additional 340,000 to 380,000 people and 225,000 additional jobs in the Southern Region to 2040. The pattern of urban growth targeted in the NPF is population and employment led, with the strategy recognising that enterprise development is drawn to urban locations by market forces such as agglomeration, migration and specialisation that depend on factors such as scale, accessibility, innovation supported by higher education institutions and quality of life. The NPF outlines the need to identify locations at an urban scale where enterprises can access competitively priced development lands, utilities and commercial properties to the highest standards. The strategy requires that regional and local authorities identify and quantify locations for strategic employment in the main cities, and where suitable in urban and rural areas generally.

5.1.2 The NPF also recognises that there are critical links between the quality of urban place-making and business investment / job creation. The approach in the strategy intends to ensure that an attractive range of enterprise development opportunities are provided in the face of changing employment activity and sectors.

5.1.3 In rural areas, outside the main cities, creating the environment to support job creation will be a key enabler to rejuvenating rural towns and villages, sustaining vibrant rural communities and reversing population decline.

5.1.4 Enterprise 2025 reinforces the need to build resilience in the enterprise sector so we can evolve and adapt to the ever changing global economic environment and technological changes and highlights the need for placemaking to develop places that are attractive for business investment and for people to live and work.

5.1.5 Within Metropolitan Cork CMATS highlights the need to reduce reliance on the private car while increasing the attractiveness of sustainable transport choices and managing travel demand to safeguard the overall attractiveness of Metropolitan Cork as a place to live, work, visit and invest. The same principles can be applied across the county.

5.1.6 Section three details the current CDP approach to economy and employment in terms of an employment hierarchy which covers the entire county and does not identify clear priorities. while Section four highlighted the dominance of Cork City in terms of the scale of jobs it supports, coupled with the dispersed nature of employment across the rest of the county. Section Four also details the significant variations in the amount of land zoned for different employment uses across the main settlements.

5.1.7 Key issues for the Review of the County Development Plan include the following:

(a) Whether the current employment hierarchy remains the optimum approach for the future in terms of attracting and sustaining investment to support economic and employment growth in the county? A revised approach could be considered along the

lines outlined in Table 5.1.

(b) The suitability of the current land supply in terms of its geographic distribution and the range and types of uses it accommodates. Do we have an appropriate amount of land available for industry / business / enterprise uses in each area? Are the land use categories – Industry / Business/ Enterprise appropriate? Would some employment land be more suited to other uses? Should business/ enterprise and residential land uses be better integrated to encourage more mixed use development and ensure a closer alignment between jobs and housing?

(c) Should all employment land within the Strategic employment areas be zoned for employment use, rather than being classified as part of the 'existing built up area' to ensure such land is safeguarded for employment uses and development is well integrated with public transport provision etc.

(d) Do our Strategic Employment Areas needs a more tailored policy approach? Do they have the appropriate amounts of land available for development?

(e) Mallow and Clonakilty have been identified as Key Towns in the RSES. Does the approach to employment land use in these towns need to be revised?

(f) Guidance is needed on the approach to the provision of Data Centres.

Table 5.1 Possible revised employment hierarchy	
Location	**Suggested Approach**
Metropolitan Cork : **Strategic Employment Areas: Carrigtwohill** **Little Island** **Ringaskiddy Whitegate.** **Other metropolitan towns: Midleton, Carrigaline, Cobh and Passage West**	➢ Metropolitan Cork will continue to be the biggest jobs market in the county and CDP polices need to continue to support the growth of employment in the city and wider metropolitan area so it can fulfil its role as an international location of scale, a complement to Dublin and the primary driver of growth in the southern region. ➢ CDP policy and the Councils economic development initiatives should target employment growth and new business start ups within the Strategic Employment Areas as appropriate and in the other Metropolitan Towns in the first instance. ➢ Development of sites served by high quality public transport corridors should be prioritised. ➢ Ensure appropriate levels of infrastructural capacity are reserved for employment growth. ➢ Prioritise investment in placemaking and other infrastructure that supports quality of life to attract employment uses – affordable housing, educational capacity, sustainable travel, public realm, amenities, cultural assets etc., to compliment other job creation initiatives. ➢ Outside the main settlements employment development at other locations should generally be resource driven. ➢ Existing employment uses outside of the main towns will continue to be supported

Table 5.1 Possible revised employment hierarchy	
Location	**Suggested Approach**
Mallow and Clonakilty Key Towns	➢ Employment led growth, more balanced live /work destinations with population growth and jobs growth within the towns to increase the scale of both, reducing commuting and promote sustainable travel options. There are ample opportunities within the existing built up area of both towns to accommodate new residential development and new business start ups. ➢ These towns also have a role in providing employment for their wider catchment. ➢ CDP policy and the Council's economic development initiatives should target employment growth and new business start ups within both towns. ➢ Prioritise investment in place-making and other infrastructure that supports quality of life to attract employment uses – affordable housing, educational capacity, sustainable travel, public realm, amenities, and cultural assets etc to compliment other job creation initiatives. ➢ A sequential approach to the development of centrally located sites which support sustainable travel should be prioritised. ➢ Outside the main town, employment development at other locations should generally be resource driven.
North Cork Agri Food Network : **Charleville, Fermoy, Mitchelstown and Mallow** **West Cork Marine Network :** **Clonakilty, Skibbereen, Bantry, Schull and Castletownbere** **Cork Ring Network :** **Bandon, Kinsale, Fermoy, Macroom and Youghal**	➢ Employment led growth, more balanced live /work destinations with population growth and jobs growth within the towns to increase the scale of both, reduce commuting and promote sustainable travel options. There are ample opportunities within the existing built up area of these towns to accommodate new residential development and new business start ups. ➢ These towns also have a role in providing employment for their wider catchment. ➢ CDP policy and the Council's economic development initiatives should target employment growth and new business start ups within the towns. ➢ Prioritise investment in place-making and other infrastructure that supports quality of life to attract employment uses – affordable housing, educational capacity, sustainable travel, public realm, amenities, and cultural assets etc to compliment other job creation initiatives. ➢ A sequential approach to the development of centrally located sites which support sustainable travel should be prioritised. ➢ Outside the main towns new employment development at other locations should generally be resource driven. ➢ Existing employment uses outside of the main towns will continue to be supported. ➢ The North Cork Agri Food Network has strengths in the food, beverage and agric tech sectors. ➢ The West Cork Marine Network has strengths in marine economy, tourism, food and beverage, digital and other assets.

Appendices

Appendix A – Employment Land Supply Table

Appendix A Table - Employment Land Supply – Main Towns Cork County					
Main Town	**Industry**	**Business**	**Enterprise**	**SPA**	**Total**
Whitegate and Aghada	248.4	-	-	388	636.4
**Ringaskiddy **	361.32	-	-	-	361.32 (265)
Carrigtwohill	174.2	54.1	-		228.3
Mallow Environs	147.35	23.46	-	-	170.81
Little Island	91.1	-	-	32.4	123.5
Midleton Environs	48.2	28.4	46.4		123
Mitchelstown	76.81	29.21	-	-	106.02
Bantry	36.1	52	-	-	88.1
Charleville	27.9	59.8	-	-	87.7
Youghal Environs	38.5	28.2	-		66.7
Bandon	18.4	45.57	-	-	63.97
Fermoy Environs	33.5	28.38	-	-	61.88
Skibbereen Environs	9.3	39.36	-	-	48.66
Kanturk	-	44	-	-	44.00
Castletownbere	21.3	18.6	-	-	39.9
Clonakilty Environs	8	10.9	11.5*	-	30.4
Macroom	16.8	12.2	-	-	29
Millstreet	-	25.7	-	-	25.7
Kinsale	5.7	19.1	-	-	24.8
Dunmanway	7.6	8.9	-	-	16.5
Cobh	-	16.2	-		16.2
Buttevant	-	14.6	-	-	14.6
Newmarket	-	12.4	-	-	12.4
Carrigaline	-	9.7	-	-	9.7
Schull	1	6.6	-	-	7.6
Passage West	0	0	0	0	0
Includes Shannonvale located outside the town.					
**Gross figure for Ringaskiddy is 361.32. Approximately 96ha already development, leaving a balance of approx. 269ha. (RY 1-18)*					

Appendix B - Current Employment Land use Definitions.

The County Development Plan objective for **'Industrial Areas'** states that the appropriate uses in these areas include manufacturing repairs, medium to large scale warehousing and distribution, bio-energy plants, open storage, waste materials treatment, and recovery and transport operating centres. The development of inappropriate uses, such as office based industry and retailing will not normally be encouraged in these areas.

'Business Areas' identified in the County Development Plan promote the development of employment uses such as light-industry, wholesale and non-retail trading uses, car-showrooms and small/medium scale manufacturing/ repairs/ warehousing/distribution uses. Other uses that could be included, where local area plans make provision, include retail warehousing and office development not suited to town centre or edge of centre locations. Uses specifically excluded from the business category would include waste management activities and general retail development.

'Enterprise Areas' are to be promoted as the primary locations for the development of employment uses that are inappropriate to town centres and require environmental standards higher than those in business and industrial areas, such as office based industry and business parks. The development of inappropriate uses, such as industry and retailing will not, normally be encouraged. Non-retail general offices may be permitted in the County Metropolitan Cork Strategic Planning Area, Mallow and Clonakilty but will be discouraged in other Strategic Planning areas unless, on a case-by-case basis, it can be demonstrated that suitable premises or sites are not available in town centres.

Appendix C - Jobs Figures Profile Table

	Home workers 2011	Total jobs excluding people working from home 2011	Total jobs including people working from home 2011	Home workers 2016	Total jobs excluding people working from home 2016	Total jobs including people working from home 2016
Appendix C **Jobs Figures Profile Table for Cork County, Cork City and Cork City and Suburbs 2011 and 2016**						
Cork County and City	14,265	157,346	171,611	14,961	173,612	188,573
Cork County	13,218	94,586	107,804	13,592	104,554	118,146
Cork City	1,047	62,760	63,807	1,369	69,058	70,427
Cork city and suburbs				2540	99,599	102,139

Appendix C - Jobs Figures Profile Table

Appendix D - Data Centres Background Document

A Planning Policy Framework for Data Centres

1.1   Definitions

1.1.1   Data centres are facilities that houses computers, storage devices, telecommunication systems, cooling systems and power backups used by organisations for the storage, management and dissemination of its data.

1.1.2   Data centres house a network's most critical systems and are vital to the continuity of daily operations. There is a high emphasis placed on design in order to optimise white space and environmental control to keep equipment within manufacturer-specified temperature/humidity range. Data centres need resilient power and fibre connectivity.

1.2   Types of Data Centres

1.2.1   There are forty-six operational data facilities of various types operating in Ireland in 2018. The average size of buildings has increased over the years, moving from 5-10 MW in the 2000's up to 15-20 MW+ today. The latest Q2 2018 date in relation to Ireland's Data industry is detailed in Table 1 below.

Data Centre Industry Q2 2018	Applications in the Planning Process	Planning permission Approved	Projects Under Construction	Connected Data Centre Capacity
	184MW	305MW	138MW	483MW
* Power capacity relates to the infrastructure required to deliver power through the national grid.				

Source: Bitpower Host in Ireland 2018 Q2 update.

1.2.2   The average Data centres of different types tend to cluster and develop together. The different types of data centres are detailed below and the current data centre locations in Ireland are outlined in Figure 2.

Hyperscale

1.2.3   Hyperscale typically refers to large companies that manage the hosting of data for their clients. In Ireland, these include Microsoft, Amazon, Google, and Facebook. These corporations build and operate data facilities based on their own requirements. In 2017, Hyperscales made up 74% of the total digital hosting capacity in Ireland [See Figure 1 for detailed breakdown].

Colocation Wholesale Data Centres

1.2.4   These facilities refer to private investors / third party wholesale colocation companies which fund, build and lease facilities to hyperscales. The third party constructs the facility and the hyperscale leases the internal space, in particular when demand for space outpaces the speed at which the hyperscale can build its own facilities.

Colocation Data Centres

1.2.5   This type of data centre provides managed facilities for partial use by third parties where "white space" can be leased. The facilities are highly secure and need to meet industry standards to attract clients. Cork Internet exchange which provides colocation services is based in Hollyhill in Cork City.

Private Data Centres

1.2.6   The smallest subgroup of Data Centres in Ireland is the purpose built / enterprise / private type which include telecoms operators, financial transaction processing companies, and computer graphics specialists.

Edge Data Centres

1.2.7   There is a growing need to have specialist data centres to accommodate developments in Edge Computing which can be described as data processing power at the edge of a network instead of in a cloud or a central data warehouse. There are presently no Edge data centres in Ireland; however, growth in this sector is envisaged in the short-term.
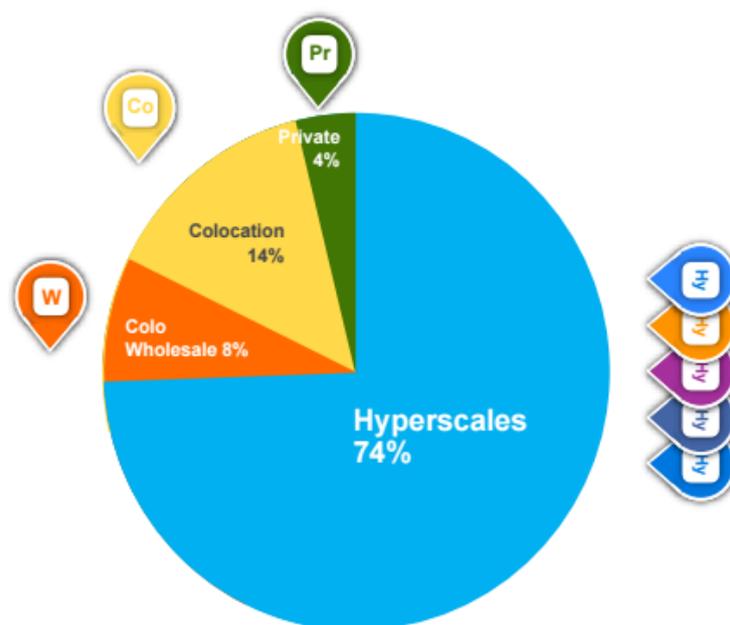

Figure 1 Relative scale of digital hosting types in Ireland in 2017,
Source: Ireland's Data Hosting Industry 2017 Report (updated Q2 2018 figures), Bitpower, Host in Ireland, SEAI.

Figure 2 Location of Data Centres on the Island of Ireland
Source: Silicon Republic 2018 (IDA Ireland: A Study of the Economic Benefits of Data Centre Investment in Ireland (May 2018).

1.3   National Policy

1.3.1   In October 2017, the Government agreed to a strengthened Strategic Policy Framework for the continued development of data centres in Ireland, as part of objectives for wider economic growth and regional development. The aim of this plan-led approach was to allow Ireland to optimise the benefits that these strategically important investments can bring to society and ensure that Ireland continues to be an attractive and competitive location for digital economy investments.

1.3.2   This strategic approach involved the following:

• Development of a Government Statement setting out the strategic importance of data centres in Ireland's Enterprise Strategy;

• The recalibration of the Renewable Electricity Policy and Development Framework to provide guidance to planning authorities on electricity generation and supply potential for enterprise development;

• The amendment of the Planning and Development (Strategic Infrastructure) Act to include data centres;

• The strategic importance of data centres being reflected in Project Ireland 2040 National Planning Framework which sets out the approach to spatial planning in Ireland to 2040; and

• Review of judicial review procedures relating to major infrastructure projects.

National Planning Framework (NPF)

1.3.3   The NPF states that Ireland is very attractive in terms of international digital connectivity, climatic factors and current and future renewable energy sources for the development of international digital infrastructures, such as data centres. This sector underpins Ireland's international position as a location for ICT and creates added benefits in relation to establishing a threshold of demand for sustained development of renewable energy sources.

1.3.4   The NPF recognises the strategic importance of data centres and includes an objective for "the promotion of Ireland as a sustainable international destination for ICT infrastructures such as data centres and associated economic activities". The Regional Spatial and Economic Strategies (RSES) must be consistent with the NPF and in turn the County Development Plan must be consistent with the regional plans.

Government Statement

1.3.5   The Government Statement on the Role of Data Centres in Ireland's Enterprise Strategy was published in 2018. It outlines the role data centres play in Ireland's ambition to be a digital economy hot-spot in Europe and states that data centres are central to the digital economy. Data centre presence in Ireland raises its visibility internationally as a technology-rich, innovative economy. In turn, this places Ireland on the map as a location of choice for a range of sectors and activities that are increasingly reliant on digital capabilities including manufacturing, financial services, animation, retail and global business services.

1.3.6   The Government reaffirms support for the development of enabling technology and infrastructure to meet enterprise, economic and social policy goals. The Government endorses, supports and promotes the appropriate and timely delivery of data centres across the regions. It reaffirms that it is Government policy and in the national interest, that these developments are delivered in the most efficient and timely way possible, based on the best available knowledge and informed engagement on their impacts.

National Broadband Plan 2012

1.3.7   The National Broadband Plan 2012 aims to deliver high speed broadband to every single premises in Ireland which will particularly assist rural Ireland. The Government has committed to step in to those areas where commercial investment will not materialise. The availability of competitively priced telecommunications infrastructure in regional locations where renewable energy resources are developed, would facilitate increased development of data centres outside of the Dublin area.

1.4   Planning Legislation

1.4.1   Communications and data infrastructure are now classified as strategic infrastructure development for the purposes of the Planning and Development Acts 2000. The Seventh Schedule of the Planning and Development Act has been amended by inserting the following text relating to "Communications and Data Infrastructure".

Development comprising the following:

"A facility consisting of one or more than one structure, the combined gross floor space of which exceeds 10,000 square metres, used primarily for the storage, management and dissemination of data, and the provision of associated electricity connections infrastructure."

1.4.2   This amendment now allows planning applications for data centres that meet these criteria to be dealt with under fast-track strategic infrastructure development procedures, meaning that applications for planning permission in respect of qualifying data centres may be made directly to An Bord Pleanála, rather than to the relevant planning authority in the first instance. Any legal challenges to decisions of An Bord Pleanála in relation to planning applications for qualifying data centres will be dealt with by the High Court under special procedures introduced for strategic infrastructure development. Maximum time limits for the making of decisions by An Bord Pleanála in relation to strategic infrastructure development applications are also to be introduced in order to streamline the judicial review of strategic infrastructure projects more generally. In June 2018 the Government published the Statement on the Role of Data Centres in Ireland's Enterprise Strategy, which indicated that the current 8 week time limit for judicial review challenges to planning decisions is under review.

1.5 Function and Benefits of Data Centres

1.5.1   The Government Statement on the Role of Data Centres in Ireland's Enterprise Strategy 2018 also outlines how the development of data centres contributes to enterprise and regional policy objectives and is a strategically important element of Ireland's future economic prospects as follows:

- Data centre technology supports a wide range of sectors in Ireland;

- Data centres, as a form of inward investment, tend to have long life spans;

- Data centres of scale are another demonstration of Ireland's position as an attractive place to invest, live and work;

- Data centre activities and services employ highly skilled individuals. Ireland's focus on ensuring we develop and attract the talent needed by 21st Century enterprise underpins our reputation and attractiveness as a location with a highly-skilled workforce;

- Data centre development in Ireland signals our ability to provide and support world class infrastructures and data management/protection;

- Data centres deliver efficient services to SMEs which improve firm-level productivity and cost competitiveness, and thus enhance our overall national competitiveness; and

- Data centres facilitate the demands from all consumers in the age of data-rich content and customised digital services (including mobile apps, location based services, video streaming and on-line games).

1.6   Review of Relevant Data Centres

Table 2: Review of Data Centres in Co Cork and significant Data Centres at a National Level

Table 2: Review of Data Centres in Co Cork and significant Data Centres at a National Level			
Name of Company	**Location**	**Description**	**Status**
Cork County			
JDC Group	Little Island (former Mitsui Denman plant), Co Cork	On the 22/06/2016, Cork County Council granted permission to JDC Group for the construction of Data Centre on the former Mitsui Denman Plant in Little Island, Co Cork. Initial permission for 23,912sqm on overall site superseded by two further applications for 2 data centres 16,888sqm and 1 data centre 31,340sqm (2 storey) on separate parts of overall site. Changes made to accommodate standalone occupiers. Total area now 48,228sqm	Not Commenced
EMC	Ovens, Co Cork	On the 27/07/2015, An Bord Pleanála granted permission to EMC for the construction of a Data Centre on a site adjoining the established business / office park development. The proposed data centre is part of an overall scheme which will be approx 15,000 sq.m. with the second expansion phase of approx 3,000 sq. m.	Not Commenced
Dublin			
Microsoft	Grange Castle Business Park, Clondalkin Dublin	Development of 4 single storey data centres located west of existing data centres c.70,392sq.m in total granted by South Dublin County Council on the 06/05/16.	Commenced
Co Meath			
Facebook	Clonee, Co. Meath	On the 22/10/2015 An Bord Pleanála granted a 10 year permission for a Facebook Data Centre on a 92ha site in Clonee, north of the M3. The €200m proposal comprised of the construction of a data centre campus in two phases with a gross floor area of 31,000 sqm.	Commenced
Co Galway			
Apple	Derrydonnell Forest, Co Galway	On the 11/08/2016 An Bord Pleanála granted permission for Apple for an €850m proposal to construct a 24,505 sqm Data Centre and a 5,232 sqm single storey logistics and administration building on a 197ha site approx 5km southwest of Athenry, Co Galway. The €200m proposal comprised of the construction of a data centre campus in two phases with a gross floor area of 31,000 sqm.	Not Commenced

Figure 3. Visual Impression of proposed T5 Data Centre in Little Island

1.7 Planning Policy Principles

➢ Formulation of Planning Policies in the Draft County Development Plan which recognise the strategic importance of the growth of the Data Centre Industry in Cork.

➢ Formulation of Planning Policies in the Draft Development Plan based on a plan led approach which provides a framework to guide the future development of Data Centres.

➢ Development of site selection criteria (detailed below) to provide guidance to the potential applicants and the planning authority on the key issues which should be considered in the site selection process.

Data Centres – Site Selection Considerations

1.7.1   The following site selection criteria have been developed to provide guidance to the potential applicants and the planning authority on the key issues which should be considered in the site selection process. This process should review these criteria and examine alternatives in order to determine the most suitable location.
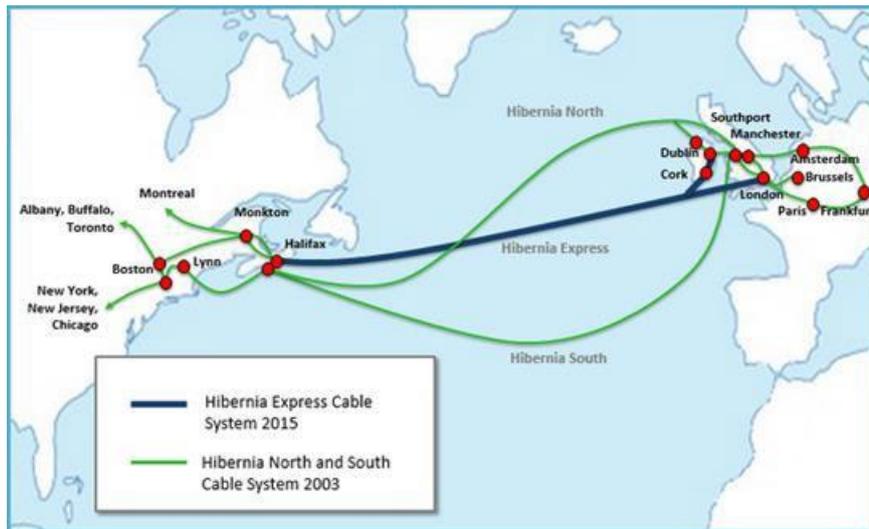
1) Site Size - Data centres require a large site area which can accommodate multiple configurations for large single users or multiple smaller sized data centres taking account of the projected demand for data storage in the future including expansion requirements and the economic and operational rationale for the clustering of data storage capacity on one site. The provision of phased masterplan approach to development would be appropriate on larger sites.

2) Communications Infrastructure - Data centres require significant strategic communications infrastructure, international cable capacity and access to local fibre connectivity.

3) Electricity Infrastructure - Data centres have high level energy demand and therefore need to be close to multiple high voltage strategic grid connections with significant electricity supply capacity available including areas with high concentration of renewable energy electricity generators.

4) Energy - Access to and proximity to multiple sources of energy i.e. including natural gas to support backup power systems is essential.

5) Education - The proximity of Data centres to third level educational institutions is important in order for firms to have access to the strong pool of highly skilled workers and top level graduates produced, including increasing numbers of skilled technicians and computer scientists.

6) Low Risk - Potential sites should be of low natural risk; i.e. remote from any Seveso sites etc, geologically stable location and avoiding sites with any potential for contamination.

7) Climate - The location of Data centres in a cool temperate climate will reduce overall energy requirements.

8) Infrastructure - Data Centre require access to appropriate infrastructure including water for cooling purposes.

9) Visual screening - The visually impact of any proposal should be carefully considered when selecting suitable sites. Landscaping and screening should be incorporated in proposals in order to mitigate the visual impact of the proposed development.

10) Connectivity - Potential sites should have good access to major transport links and should benefit from high quality international connectivity.

1.8 A Rationale for Data Centre Investment in Co Cork

- Cork is the primary economic engine and driver of growth in the Southern Region providing the basis for a complementary role with Dublin at a National Level.

- Cork is the second largest City in the state with a critical mass and development capacity across the entire Metropolitan area.

- Cork is unconstrained by energy supply with significant natural resources including natural gas, oil, hydroelectricity, onshore and offshore wind, ocean energy, biomass, geothermal and solar energy. The significant renewable energy potential is a key asset in terms of low carbon transition.

- Cork is connected to the new transatlantic Hibernia Express (Figure 4) link will link Halifax, Nova Scotia to Slough in England and Cork providing Tier 1 fibre connectivity. A second subsea fibre-optic cable providing connectivity between Ireland via Cork to Europe; the Ireland –France Subsea Cable is currently being progressed and again will enhance Cork's role in providing ultra-high capacity transmission to large enterprises and telecommunication carriers in Ireland to provide connectivity with continental Europe.

- Cork International Airport and the Port of Cork are key assets providing for global connections and accessibility with significant capacity for expansion. Cork Airport is Ireland's second largest airport supporting an estimated 4,550 jobs with a contribution to GDP of approx €306 million. The Port of Cork is a Tier 1 Port handling 19% of all seaborne trade in the State and the relocation of Port of Cork's container terminal business to Ringaskiddy will significantly increase capacity of this international gateway.

- Transport - Cork has defined national transport corridors capable of supporting significant levels of future growth in tandem with bus and rail public transport networks.

- Cork has excellent access to talent with UCC and CIT producing a strong pool of highly skilled workers and top level graduates. Cork also has a proven pool of IT talent and long track record of supporting significant global tech companies such as Apple, EMC and Intel.

- Cork has a significant availability of zoned employment site options for the development

of Data Centres.

- **Figure 4 Hibernia Express Trans-Atlantic Cab**