

IRELAND 2040



CORK
AIRPORT



EXECUTIVE SUMMARY

The Cork area already possesses the key qualities required to become a complementary growth centre to Dublin. The following will be required in order to ensure this happens.



Recommendation 1.

That Cork be designated as a national population growth centre.

Cork (city and county) today has a healthy baseline population of 0.54m, which is growing strongly as indicated by the *Preliminary Results* of Census 2016. There is no other centre outside Dublin with a comparable population or economic base. Accepting this, and acknowledging that Dublin and Cork cities represent two of our most important national centres, it is critical that capitalise and build on the opportunities that they present. In so doing, we will further drive national growth and vitalise the regions that they serve and beyond. These national centres must be properly invested, resourced and supported. Spreading resources too thinly is to risk repeating past failures and perpetuate the cycle of inefficient use of resources to limited economic effect and social benefit. The City and County Councils have developed a plan-led strategy ('Cork 2050') to grow the population base of Cork to 0.8m, which we support. It is crucial to support that critical mass in order to achieve a growth centre that is complementary to Dublin. In this regard, the NPF must support the scale of ambition in Cork, recognising that we are a small island able to support and grow a limited number of major metropolitan areas. We therefore request that Cork (city supported by growth towns and villages) be designated as a national population growth centre.



Recommendation 2.

Alignment of population and employment growth.

In order to promote quality of life, it is important that all aspects of Ireland 2040 be aligned. Housing and employment in particular must be considered together. The NPF must align with Cork City and County Councils' Cork 2050 proposal to develop employment in a spatially efficient compact manner and near to public transport where possible. Cork 2050 also highlights that GVA per capita in the south west region (and Dublin) stands at €45,000 compared to c.€30,000 elsewhere. It is critical that this productivity be maintained through alignment with employment planning. Cork Airport is a strategic location for employment in the region. Cork Airport Business Park is fully let and there is appropriately zoned land available for enterprise development beside the airport. Maintenance, repair and overhaul (MRO) should also be facilitated to support the growing aircraft fleet based at Cork Airport.





Recommendation 3.

Provide Requisite Infrastructure to Support Continued Growth and Prosperity.

Fundamentally, Cork contains all of the key qualities required of a successful city. As it grows in scale, it will require to be supported by the delivery of infrastructure in order to fulfil its potential and to contribute even further to the region in which it is situated. We therefore request that the NPF include the following key pieces of infrastructure:

- Upgrade the Dunkettle Interchange as a strategic priority of critical short term importance to ensure Cork is accessible.
- Upgrade the N28 between Bloomfield Interchange and Ringaskiddy village.
- Upgrade inter-urban roadway connections between Cork and Limerick (M20), and also between Cork and Waterford (N25).
- Upgrade of the N27 link between Cork City and the Airport and to Kinsale along the R600 where required.
- Public transport provision to match Cork's employment growth strategy.
- Early roll-out of digital connectivity.



Recommendation 4.

To support continued growth in connectivity at Cork Airport.

The international connectivity provided by Cork Airport into the region helps support and sustain employment including but not limited to tourism. This is reflected in findings of the 2015 InterVISTAS study Cork Airport Economic Impact Study, which found Cork Airport supported 10,710 jobs and GDP of €727m across the region through direct, indirect, induced and catalytic effects. *The Growing Tourism in Cork – A Collective Strategy* was launched by the Cork Tourism Strategy Taskforce in 2015. It outlines a five year plan for increasing domestic and international visitor numbers by over 20% in the Region to 2.8 million with an associated increase in spend in the local economy of €865 million. We request that the NPF acknowledge the vital role of Cork Airport and continue to support the growth of international connectivity to the benefit of the wider region and beyond. The NPF must support provision of the infrastructure necessary to lengthen and expand the range of destinations directly served from Cork Airport.



Recommendation 5.

Support the Strong Education Base of Cork.

Cork possesses and maintains excellence with respect to its education programmes, particularly third level. This is feeding employment locally, but is also driving an education, research and innovation culture. The knowledge base provided by the presence of two strong third level facilities in Cork City is now generating its own impacts. The Tyndall National Research Institute, Alimentary Pharma-biotic Centre, Moorpark Dairy and Food Research Centre, Nimbus Centre for Research are but a few examples of the enterprise supported by the strong knowledge base within Cork City. Cork City must continue to be the focus of targeted investment in education in order to maintain this traction and to continue to be an attractive proposition to inward investment.

In summary, we request that the NPF designate Cork for population growth on a national scale and that that growth be supported by a structured implementation plan to ensure it's success.

PROPOSITION

Cork City is Ireland's second city. It is a vibrant metropolitan area of international renown and former European Capital of Culture. Today Cork city is home to a resident population of 126,000 with an additional 417,000 persons within the county¹. This scale differentiates it from anywhere else outside the Dublin region, and puts it on a platform that is unassailable by other regional centres.

Cork metropolitan area has a unique combination of attributes that collectively create a strong sense of place and vibrancy serving as an exemplar for what a city of *Ireland 2040* should be.



CORK UNIQUE SELLING PROPOSITION (USP's)

Population

Cork is the only area of population scale outside the Dublin region, and is witnessing steady population growth (1% p.a.) just ahead of Galway and higher any other regional city. The next city of any scale in the Southern Region is Limerick, with less than half the resident population and growing much more slowly (0.4% p.a.). The CSO projects South West Region (Cork and Kerry) will grow by 0.5% p.a. to a total of 733,000 by 2031², which will represent the highest regional population outside the Greater Dublin Area. Cork City and County Councils have also identified potential to grow the population base of Cork from 0.5m to 0.8m through their *Cork 2050* strategy.

Education

Cork City is home to two major third level institutions, University College Cork (UCC) and Cork Institute of Technology (CIT). Together they provide a student population of over 35,000 in the city and ensure a continued supply of world class graduates for employment, enterprise, research and innovation within the region.

Employment

Whilst Cork may be a city of small scale by international standards, it nonetheless hosts a varied employment portfolio. It is well known for its pharma cluster; the largest such cluster outside the Dublin region, but it is also home to indigenous and multi-national companies across a wide variety of sectors. These include bio-pharma, agri-food, tourism, financial services and technology. It therefore provides an employment base across a variety of sectors with multiplier effects for the wider regional economy.

Connectivity

It is important for any city to have national and international connectivity. Cork has this in spades:

- International connectivity through the Airport including key UK, European and US destinations.
- National connectivity through motorway linkages and hourly trains to the capital.
- Regional connectivity to Waterford and Limerick via the N25/N20, although these links can be improved.
- City-wide connectivity through a compact urban form and cycling culture. The introduction of a Cork Bikes Scheme makes connectivity throughout the island area fast, accessible and an easier place to do business.
- Deep water port facilities at Ringaskiddy and one of only two ports nationally that can serve all shipping modes for import/export (lift on/off, roll on/off, liquid bulk, break bulk and cruise).

Culture

All of these elements combine to provide a location where people want to live and work – critical in terms of both the quality of life for existing residents and in attracting highly skilled labour. Cork city has a strong and positive identity on which to develop a complementary centre to Dublin. The landscape, coastline, culture and unique historical and tourism offering in Cork led to it being the European Capital of Culture in 2005, a ringing endorsement of its unique qualities.

Tourism

Cork is ideally situated at the gateway of both Ireland's Ancient East and the Wild Atlantic Way, and is positively positioned to deliver tourists into an uncongested area between two of Ireland's key tourism products.

POSITIONED FOR GROWTH

Cork City and the wider region already possess the inherent qualities that contribute to strong place-making and identity. More importantly, Cork’s unique qualities result in a place that people choose to live. What Cork needs is the right supporting physical infrastructure, complementary services and targeted investment to provide zoned and serviced land in the right locations. This will allow Cork to build upon existing economies of scale – not found elsewhere outside of Dublin – and fully realise the clustering and agglomeration effects to the benefit of the wider region. The NPF must capitalise on these qualities through the designation of Cork as a national population growth centre and must support this scale with the necessary infrastructure required to ensure long-term sustainable and prosperous growth.

RECOMMENDATION 1.

That Cork be designated as a national population growth centre.

Ireland 2040 will be a plan for all of Ireland. While it has been identified that the Dublin region presently accounts for 49% of GDP, the challenge remains to provide the best foundation and potential for growth in the remaining half of the economy. It is clear from the Dublin Region, that critical mass gains traction, and with that comes growth and opportunity. It is requested that Cork be designated as a national population growth centre for the following reasons:

- It is the only area outside the Dublin region with a reasonable population base from which critical mass can be grown. Cork’s clear strategy to grow its metropolitan area to a population of 0.5m by 2050 is testament to this. In its entirety, Cork County has the ability to grow to 0.8m which would mean that it could realistically become a complementary and/or viable alternative urban centre to Dublin.
- Cork, through its city and county development plans, has a defined spatial approach to achieving this growth in a sustainable manner. It is proposed to generate between 3,500-4,500 people per square kilometre. This population growth will be distributed through the re-purposing of docklands areas in the city, as well as through the development of new towns such as at Monard. There is already a plan in place for Cork to grow towards this population threshold. We therefore request the following objective be included in the NPF:

Recommendation 1.	Proposed Objective
i	That the city and county of Cork be designated as a national population growth centre with the ability to grow to 0.8m by 2050.



**Recommendation 2.
Alignment of population and
employment growth.**

It is imperative that in order for the NPF to succeed, there must be alignment between spatial and employment planning. The population and housing projections of the NPF must be aligned with employment growth, both indigenous and inward investment.

Cork is a strong region in terms of sectoral employment. Whilst it is well known for its pharma cluster which employs 14,000 alone, there is also considerable employment in the life sciences, financial services, tourism, and emerging marine and renewable technologies sectors. This provides an excellent foundation from which to leverage further growth. The presence of two third level institutes, together with growing research institute, makes Cork a very attractive proposition for indigenous or international enterprise.

As outlined in the IDA's strategy document Winning Foreign Direct Investment 2015-2019, a complete package is required when attracting inward investment. It will be critical to have an ample supply of housing stock in addition to a demonstrable plan for future housing growth.

Much of Cork's indigenous industry is in the agri-food sector, stemming from the rich agricultural hinterland. Kerry Group and Dairygold, two large food producers are located in the region, which is known as a thriving centre for artisan food and drink production. Cork's heritage as a trading merchant city also survives in the form of food and drink producers such as Barry's Tea and Heineken.

Tourism is a growing sector in Cork, attracting approximately 17.5% of all visitors who come to Ireland and is second only to

Dublin in terms of tourist bed nights ³. It is ideally situated at the gateway of both Ireland's Ancient East and the Wild Atlantic Way, positively positioning Cork within the leisure tourism market nationally and internationally. In this respect, Cork Airport is uniquely positioned to deliver tourists into an uncongested area, strategically located between two of Ireland's key tourism products. The strategy *Growing Tourism in Cork – A Collective Strategy* was launched by the Cork Tourism Strategy Taskforce in 2015. It outlines a five-year plan for increasing domestic and international visitor numbers by over 20% to 2.8m with an associated increase in spend in the local economy of €865m.

The NPF should support Maintenance, Repair and Overhaul (MRO) activities at Cork Airport, which should be facilitated to support the growing aircraft fleet based at the airport.

Over the past 20 years the Cork Business Park has been developed adjacent to Cork Airport. This commercial office development is fully let and has become one of the leading employment sites in the Cork Region, as employers seek to take advantage of the site's location adjacent to Cork Airport. We request that the NPF set out specific opportunities for Cork to continue to grow its employment base in a sustainable manner and ask for inclusion of the following objectives:

Recommendation 2.	Proposed Objective
i	Employment opportunities for Cork and its region shall align with its designation as a national population growth centre for up to 0.8m.
ii	An expanded enterprise area shall be supported at Cork Airport on lands already appropriately zoned for development of employment uses.
iii	Maintenance, Repair and Overhaul (MRO) activities shall be accommodated at Cork Airport.
Implementation Plan Policy Requirement	
iv	All policies and objectives of the NPF shall be cross-referenced in a matrices form, to ensure consistency and deliverability of the objectives.

³ Growing Tourism in Cork, A Collective Strategy, Cork Tourism Strategy Taskforce, 2015 Growing Tourism in Cork, A Collective Strategy, Cork Tourism Strategy Taskforce, 2015.

Recommendation 3.
Provide Requisite Infrastructure to Support Continued Growth and Prosperity

It will be fundamental to ensure that the NPF provides a clear direction for growth around which investment can be based. It is not feasible to spread scarce resources over multiple areas. Critical mass is required to ensure that such investment decisions are sound and sustainable and deliver value for investment.

It will be necessary to underpin a critical mass of population and future growth, with supporting infrastructure in order to ensure that communities are sustainable, and built on a solid foundation.

Fundamentally, Cork contains all of the key qualities required of a successful city. As it grows in scale, it will require to be supported by the delivery of infrastructure in order to fulfil its potential and to contribute even further to the region in which it is situated. This includes the phased delivery of requisite infrastructure including housing, education, water, waste water and transport. In particular, we request that the NPF identify and prioritise delivery of the following key pieces of infrastructure:

- Upgrade the Dunkettle Interchange as a strategic priority of critical short term importance to ensure Cork is accessible.
- Upgrade the N28 between Bloomfield Interchange and Ringaskiddy village.
- Upgrade inter-urban roadway connections between Cork and Limerick (M20), and also between Cork and Waterford (N25).
- Upgrade of the N27 link between Cork City and the Airport and to Kinsale along the R600 where required.
- Public transport provision to match Cork's employment growth strategy.
- Early roll-out of digital connectivity.

Recommendation 3.	Proposed Objective
i	The NPF shall prioritise the delivery of infrastructure to identified national population growth areas. In particular for the Cork area, priority shall be given to the delivery of the following: <ul style="list-style-type: none"> • Upgrade Dunkettle Roundabout. • Upgrade the N28. • M20 Cork-Limerick motorway. • N25 Cork-Waterford inter-urban route. • Upgrading of N27 Cork-Cork Airport link. • Public Transport schemes in identified employment areas. • Roll out of digital connectivity.
	Proposed Implementation Policy
ii	The vision and ambition of the NPF shall be accompanied by an Implementation Plan. The Implementation Plan shall identify the necessary infrastructural supports, and growth triggers for these.

Recommendation 4.
To support continued growth in connectivity at Cork Airport

Over the course of the recent recessionary period, and for almost half of the last century, in addition to promoting indigenous industry, Ireland has looked outward for economic opportunity. Aviation has been a key part of this, and Cork Airport plays a significant role in the surrounding economy. A study prepared by economists InterVISTAS in 2015 identified that Cork Airport alone supported almost 10,700 jobs in the local economy and its total impact contributed €727m to GDP.

It is clear that Cork Airport plays a significant role in the surrounding economy. It has the largest passenger base and the broadest range of destinations served of any airport in the Republic of Ireland outside of Dublin, with over 50 different routes to 12 different countries. The scale of Cork Airport's daily services to major hubs such as London Heathrow, Paris and Amsterdam ensure that it provides a much greater quality of connectivity than the remaining regional airports on the western seaboard.

The quality and range of air services available at Cork Airport is a key advantage. The region's position as a centre for pharmaceuticals, information technology and tourism is supported by the air connectivity provided by Cork Airport. This includes the transportation of high-value exports around the world, and enables employees of multinational businesses to travel to clients, regional offices and global headquarters.

The document Growing Tourism in Cork – A Collective Strategy was launched by the Cork Tourism Strategy Taskforce 2015. It outlines a five-year plan for increasing domestic and international visitor numbers by over 20% to

2.8m with an associated increase in spend in the local economy of €865m.

The National Aviation Policy which was published by the Department of Transport, Tourism and Sport (DTTAS) in 2015 acknowledges the broader economic role of aviation and sets out the following objectives:

- To enhance Ireland's connectivity by ensuring safe, secure and competitive access responsive to the needs of business, tourism and consumers;
- To foster the growth of aviation enterprise in Ireland to support job creation and position Ireland as a recognised global leader in aviation; and
- To maximise the contribution of the aviation sector to Ireland's economic growth and development.

Cork Airport already has a plan in place to enhance connectivity. The airport is currently uncongested and can readily be scaled up to accommodate more passengers. The Cork Airport Masterplan (2014 to 2020) safeguards for growth of up to 3.8 million passengers per year. In the longer term it also safeguards for an ultimate airport of 7.5 million passengers per year beyond 2034. The NPF must support provision of the infrastructure necessary to lengthen and expand the range of destinations directly served from Cork Airport.

In order to ensure alignment between aviation and planning policy, we therefore request inclusion of the following objectives within the NPF to facilitate the wider aviation industry and to ensure deliverability through a cross-departmental check for consistency.

Recommendation 4.	Proposed Objective
i	The NPF supports the objectives of the National Aviation Policy and shall facilitate the growth of connectivity at Cork Airport. The NPF must support provision of the infrastructure necessary to lengthen and expand the range of destinations directly served from Cork Airport.

Recommendation 5.
Support the Strong Education Base of Cork

Any plan for Ireland in 2040 must continue to grow the strong education base which exists in Cork and which stems from a plentiful supply of graduates from its 35,000-strong student population. This knowledge base and highly educated workforce is a key advantage in attracting and retaining employment in the area. Universities can also act as anchor institutions in local economies, as major employers, purchasers of local goods and services and as contributors to the cultural life of cities. Business innovation in the wider region is also supported through the research function of a university and human capital development through the teaching function and access to higher education.

As a result of this knowledge base, Cork is already developing as an innovation and research hub. UCC is included within the top 2% of research institutions globally, whilst CIT has directly contributed to the development of 250 start-up companies over the last 10 years. It is therefore unsurprising that the *Cork 2050* plan prepared by Cork City and County Councils includes Education as one of its targeted growth sectors.

The IDA notes in its *Winning: Foreign Direct Investment 2015-19* strategy document that a skilled employment base forms a key tenet of the regional value proposition to IDA clients when they are considering investment locations:

Clear trends are evident in the demands of FDI investors in selecting locations, including: regions of scale with appropriate urban centres, supply of skilled people, international connectivity, energy infrastructure, telecommunications, R&D capabilities, sub-supplier and services infrastructure.

It is therefore requested that growth in education be a core tenet of the development strategy for Cork. We therefore request inclusion of the following objective in the NPF:



Recommendation 5.	
Proposed Objective	
i	The NPF shall facilitate the expansion of third and fourth level education facilities for Cork and the wider region.
Proposed Implementation Policy	
ii	All policies and objectives of the NPF shall be cross-referenced in a matrices form to ensure consistency and deliverability of the objectives.

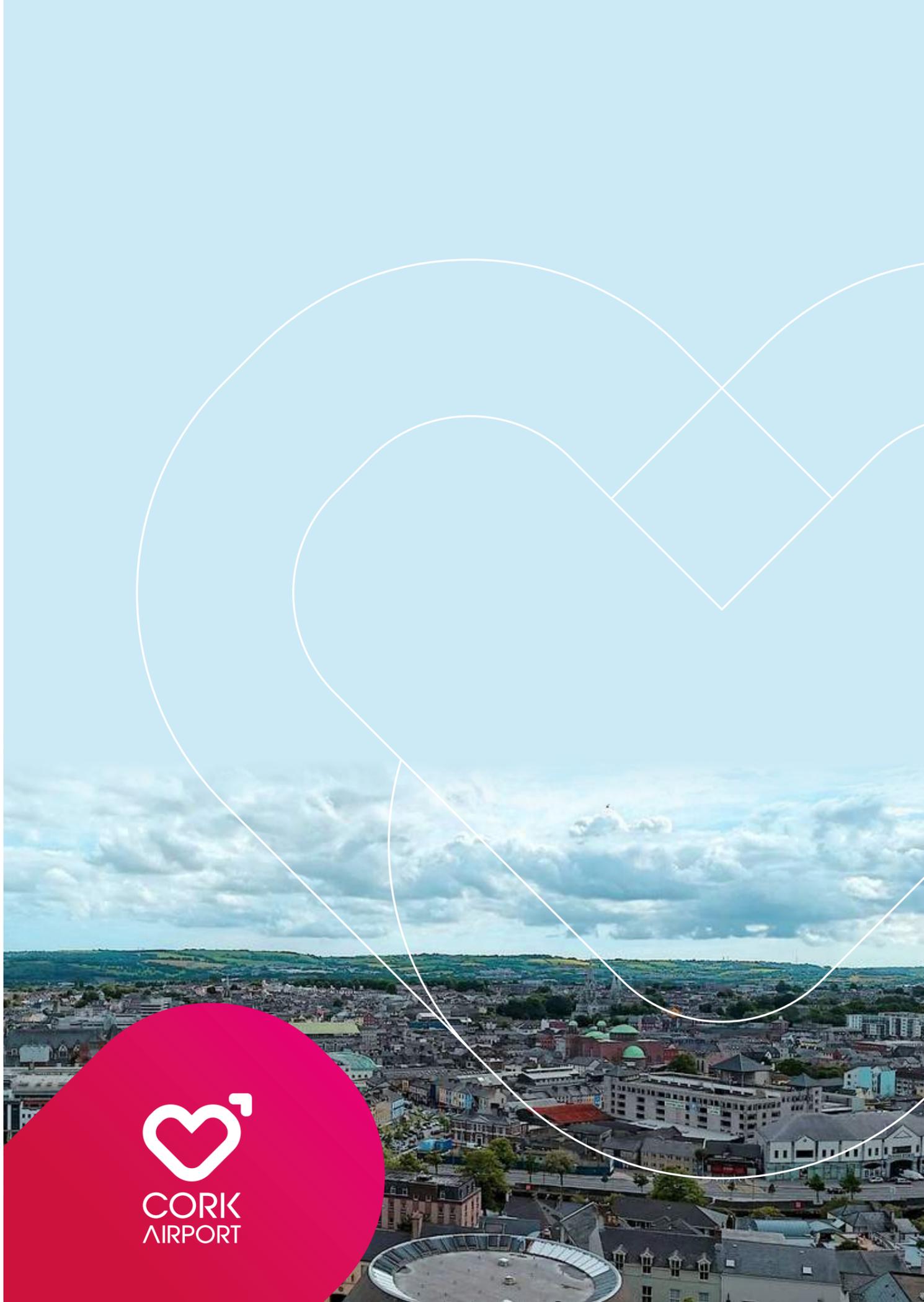


Recommendations	Why	Evidence Base for Recommendations
<p>1. That Cork be designated as a national population growth centre.</p>	<ul style="list-style-type: none"> The NPF Issues Paper has identified that there will be a requirement to accommodate an additional 0.75m people by 2040. The NPF Issues Paper has identified that at least 0.5m housing units will be required by 2040. 	<ul style="list-style-type: none"> 0.5m – The baseline population of Cork County which presents the only viable centre with the ability to facilitate and grow critical mass outside the Dublin region. 4.2% population growth witnessed by Cork County over the last intercensal period 5.4% population growth witnessed by Cork City (1.0% p.a.) over the last intercensal period (Dublin City 4.8%/0.95% p.a.) 0.5%- the per annum growth rate for the South West Region (Cork and Kerry) to 2031 as projected by the CSO ⁴. 0.75% the actual per annum growth rate witnessed in the South West Region over the last inter-censal period. 0.3m – The targeted population growth for Cork City and County, identified in their joint plan-led growth strategy: <i>Cork 2050</i>. 180ha – The area of Docklands available for high density mixed-use waterfront development in Cork City. Further new housing will be available in new towns such as at Monard. 19%- The percentage contribution of Cork County to national GDP ⁵. Critical Mass – An IDA identified key factor in attracting and retaining FDI ⁶.
<p>2. Alignment of population and employment growth.</p>	<ul style="list-style-type: none"> In the absence of jobs, a population strategy will not work and vice versa. Cork Airport Business Park is fully occupied and there are appropriately zoned lands for development of employment uses available beside Cork Airport. 	<ul style="list-style-type: none"> 0.3m – The projected growth in population that will require employment in the county. Skills, property, competitiveness and infrastructure – a pre-requisite identified by the IDA in attracting high value FDI.
<p>3. Provide Requisite Infrastructure to Support Continued Growth and Prosperity.</p>	<ul style="list-style-type: none"> The reactive response to the housing crisis of the 1960s through the development of high-rise housing without ample social or physical infrastructure demonstrably failed. 	<ul style="list-style-type: none"> It is anticipated that the population of Cork will grow by 60% over the plan period to 850,000 ⁷ this will require additional infrastructure; <i>Cork 2050</i> aims to create the circumstances to deliver an additional 120,000 new jobs. Productive investment in areas such as transport will in turn improve accessibility, quality of life and competitiveness.
<p>4. To support continued growth in connectivity at Cork Airport.</p>	<ul style="list-style-type: none"> It will increase choice, frequency and number of destinations. It supports both inbound and outbound tourism, inward investment and facilitates international connectivity and mobility for all business travellers. 	<ul style="list-style-type: none"> Total employment supported by activities at Cork Airport is estimated to be 4,500 jobs, or 10,700 when all direct, indirect and catalytic employment impacts are considered ⁸. The International Air Transport Association (IATA) forecasts a near doubling of the existing 3.8bn air travellers by 2035 ⁹.
<p>5. Support the Strong Education Base of Cork.</p>	<ul style="list-style-type: none"> The delivery of skills within the region will be a key requirement to service existing, and deliver further employment in the region. This in turn supports population growth. Higher education institutions are central to the process of developing knowledge-based industries in order to nurture the unique assets and circumstances of each region. In order to be competitive Ireland needs to invest in its innovation systems at national and regional levels. The local availability of knowledge and skills is increasingly important to attract high-value FDI. Industry in developed countries is increasingly turning towards value added segments, meaning in order to attracting FDI the country requires good access to new technologies, knowledge and skills. Universities contribute towards cultural and community development in a city. This can, among other things, create the conditions in which innovation thrives. 	<ul style="list-style-type: none"> The IDA notes in its <i>Winning: Foreign Direct Investment 2015-2019</i> that skills form for an intrinsic part of the Regional Value Proposition to IDA clients ¹⁰.

4 Regional Population Projections 2016 2031, CSO, 2013
 5 Cork 2050 – Realising the Full Potential (Executive Summary Document), Cork City and County Councils, 2017.
 6 Winning: Foreign Direct Investment 2015-2019, IDA Ireland
 7 Cork 2050 – Realising the Full Potential (Executive Summary Document), Cork City and County Councils, 2017.

8 Cork Airport, Economic Impact Study, prepared by InterVISTAS, 2015.
 9 Connectivity Report, Airports Council International (ACI), 2016.
 10 Winning: Foreign Direct Investment 2015-2019, IDA Ireland.





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