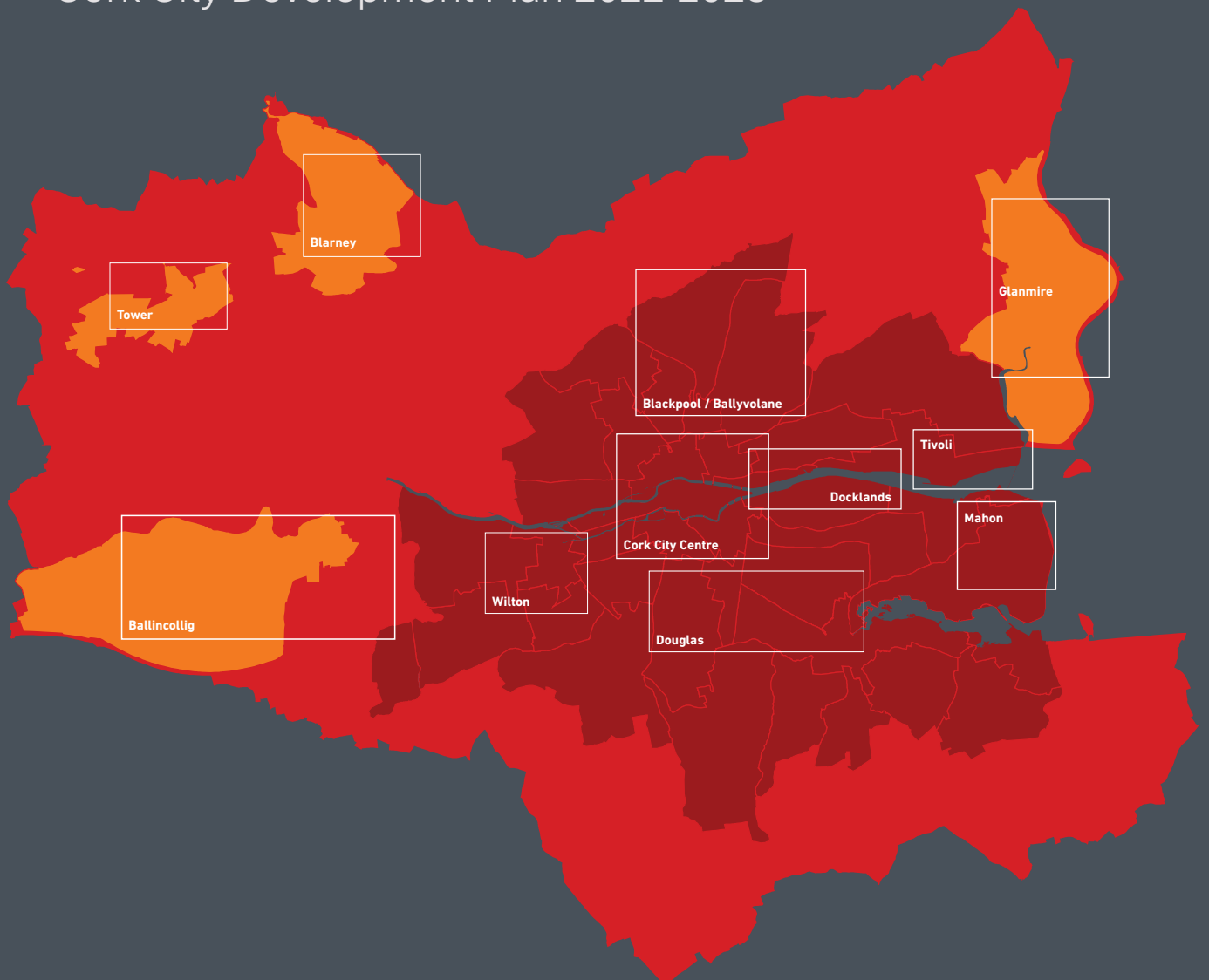


# Cork City Strategic Employment Locations Study



# Strategic Employment Locations Study

In support of the preparation of the  
Cork City Development Plan 2022-2028



**Connecting people.**  
**Connecting places.**

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All involved would like to extend their thanks to the project steering group team comprising the following:

## Cork City Council

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# 00. Executive Summary

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Cork City Council commissioned HW Planning and project partners Savills and MHL Consulting Engineers to undertake a Strategic Employment Locations Study to assist in the preparation of the Cork City Development Plan 2022-2028. This report profiles Cork City using employment-based socio-economic indicators; includes a market assessment in respect of supply, spatial distribution and vacancy; reviews the existing position in relation to land use zoning; establishes future employment land requirements; identifies future employment locations; and makes recommendations to inform the employment strategy in the forthcoming Development Plan.

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

- There are clear national, regional and local policy aspirations to significantly grow employment provision in Cork City in support of its objective to become an 'international city of scale'<sup>1</sup>. This necessitates real ambition in terms of the development of an employment strategy in the Cork City Development Plan 2022-2028 where the emphasis should be on the delivery of tangibles which create the conditions to secure investment in jobs growth.
- A review of socio-economic datasets confirms variable levels of performance across different sub areas of the city in relation to key employment metrics. There is a clear juxtaposition between high job numbers and high unemployment rates in some specific areas where available jobs may not cater for the skillsets of the local demographic. Elsewhere, there are clear patterns of daily cross-commuting for work taking place in the city confirming that a lot of people do not work in the area in which they live. Within this, there has been a spatial imbalance in jobs growth in recent years with the development of new employment largely taking place in the south of the city.
- Cork City has approximately 90% of the total office market in Cork. 44% of existing stock is located in the city centre, with the quantum of floorspace in the South-East suburbs (19.8%) and City Hinterland (15.3%) also notable. The delivery of new 'grade A' offices in the City Centre over the last five years is highly promising contributing to the creation of a new international identity for Cork. It is vital that the forthcoming Development Plan builds on this to deliver a world-class urban centre.
- Cork City has approximately 50% of the industrial market in Cork. There is a notable shortage of available industrial / manufacturing / warehouse stock in the city at present and this is hampering market activity. The vacancy rate in the city is just 1.61% of total floorspace and this needs to be addressed through new supply as a priority measure.

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<sup>1</sup> Refer to page 27 of National Planning Framework.

- At present, there is a total of 650 hectares of zoned employment land in the administrative area of Cork City, of which 417 hectares is undeveloped and available. 350 hectares of this relates to 'business' use, with 67 hectares having an 'industrial' base. Of significance is the fact that 264 hectares of available and currently zoned land<sup>2</sup> (63% of total) relates to five large strategic land banks only (Tivoli, Cork Science and Innovation Park, Kilbarry, Cork Airport and Ballincollig) on which there has been little to no development activity over the last 10 years.
- Based on population forecasting, this report identifies a jobs growth target of 47,034 to 2028. Using modelled sector split scenarios, it is envisaged that 31,042 of these jobs will be in office-based industries and manufacturing, including light industry and logistics. A preferred mid-scenario based on reasoned assumptions has identified the need for approximately 228 hectares of zoned employment land to cater for future requirements.
- In terms of future supply, a specification has been developed for key employment growth and relocation sectors in Cork City. It is recommended that seven new employment locations be zoned in the forthcoming Development Plan. It is also recommended that appropriate consideration should be given to achieving a greater distribution of employment land. These recommendations are made with a view to addressing key employment issues identified as part of the study, including providing greater job opportunities in high unemployment areas, achieving an improved spatial balance in the geography of employment sites in the city, and facilitating improved placemaking to deliver vibrant live/work locations in accordance with planning policy, as well as market requirements.
- The redevelopment of the Docklands and Tramore Valley to promote the transition from low density traditional industry to higher density mixed use will, over time, lead to the decanting of jobs to other locations within the City and Metropolitan Cork, and as part of the migration of port activities to the Lower Harbour, especially to Ringaskiddy<sup>3</sup>. This is a significant issue in respect of the forthcoming Development Plan and beyond this into the next plan period, which needs to be addressed through the delivery of viable alternative locations and/or focused policy interventions as part of a proactive economic strategy. The employment forecast has considered floorspace and associated land requirements arising from this.
- The development of the Cork Science and Innovation Park (CSIP), as identified as a key future growth enabler in the National Planning Framework and the Cork Metropolitan Area Strategic Plan, is of critical importance to future economic growth of Cork City and the wider Southern Region. It is recommended that the 2011 CSIP Masterplan should be reviewed with a renewed focus on practical delivery in the life of the new Development Plan, including enabling infrastructure, supporting uses and placemaking. This could be formalised through policy measures. There is significant untapped potential at this location related to growth sectors led by R+D such as the knowledge economy, life sciences, clean tech and environmental, ICT and shared services jobs.

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<sup>2</sup> As zoned in development plans and local area plans.

<sup>3</sup> Marino Point and Whitegate may also have a significant role to play.



# 01. Introduction

---

## 1.1 Background

Cork City Council commissioned HW Planning and project partners Savills and MHL Consulting Engineers (the Project Team) to undertake a Strategic Employment Locations Study (SELS) to assist in the preparation of the Cork City Development Plan 2022-2028. This evidenced-based study is being carried out in accordance with national and regional policy which requires that local authorities identify and quantify locations for strategic employment development in major cities.

The National Planning Framework (NPF) has earmarked Cork City for substantial population and employment growth in the coming years. This policy is in recognition of the need to provide for more balanced regional development following the rapid expansion of Greater Dublin in recent decades. The forthcoming Development Plan is the first since the administrative boundary of Cork City was extended in 2019. The emerging employment policies will therefore need to establish the potential of traditional employment centres to grow and evolve during the lifetime of the upcoming plan, while also identifying the opportunities for development in areas that would previously have been outside of the city jurisdiction. This study aims to identify such opportunities based on a coordinated approach which integrates land use and transportation as well as critical supporting infrastructure.

A Development Plan is fundamentally about delivery – the realisation of a vision for a city and its supporting strategies. The bringing together of planning, property market and infrastructure feasibility expertise in the preparation of this report was deliberate in recognition that interactions between these disciplines will determine the success or otherwise of building on Cork’s already sterling reputation as an employment location and achieving targets in a diverse range of sectors for a broad spectrum of employment types.

## 1.2 Purpose and Scope

At highest level, the purpose of study is to target and stimulate investment in employment growth over the next 6 years and beyond in Cork. Key to this is creating the right conditions to support economic growth as part of a plan-led approach under the Cork City Development Plan 2022-2028.

The defined brief for the project included the following work packages:

- A baseline review of strategic office and manufacturing supply.
- An analysis to determine strategic office and industry requirements necessary to meet jobs growth targets for Cork City.
- Development of a strategic employment (office and manufacturing) strategy for Cork City, including a clear assessment of property and development requirements to accommodate projected growth to meet the employment requirements of established Cork City population targets.

- Identification of Strategic Office Locations within Cork City including a specification of each; and
- Identification of Strategic Manufacturing Locations, including a specification of each.

Based on the defined project scope, this study has a focus on office and manufacturing locations. It is recognised that these categories can comprise a broad classification of employment use types. For clarity, the following definitions have been adopted for the study:

*Office: Professional, administrative or business-related use of office space, including research and office-based industry.*

*Manufacturing: Light and general industry, where a process is carried out for the making of an article.*

In forecasting future employment land requirements, a third category related to logistics (storage and distribution) was included in recognition that it plays an important incidental employment role in Cork City related to the packing, storing and movement of manufactured items.

It is recognised that tourism is an important employment sector in Cork. Associated considerations will be addressed through the development of a destination strategy to be prepared by Fáilte Ireland in partnership with Cork City Council and Cork County Council.

### 1.3 Methodology

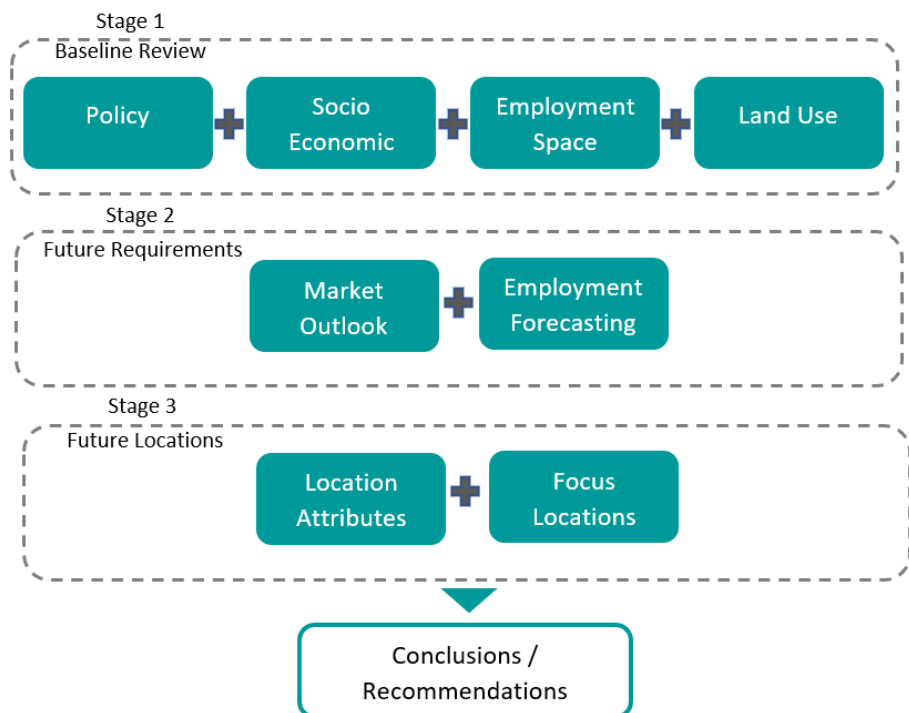


Figure 1.1 Outline Approach

The preparation of the report has been shaped by guiding principles for the identification of strategic employment locations contained in the Regional Spatial and Economic Strategy (RSES) for the Southern Region.

There are a variety of factors and influences to consider when objectively assessing employment needs in urban areas. This study has drawn on both quantitative and qualitative analysis to define and explore key issues within the context of Cork. The findings have been distilled to reach overarching conclusions and implications.

A variety of datasets have been used to establish baseline conditions and forecast projections, supplemented as necessary with in-house research and geographical information systems analysis. All figures related to existing floorspace stock, vacancy rates and pipeline projects are derived from Savills proprietary database.

An important consideration for any work of this type is that it is inevitably a point-in-time assessment. This study has incorporated the latest data and other evidence available at the time of preparation, and where applicable, is based on reasonable assumptions.

## 1.4 Study Area

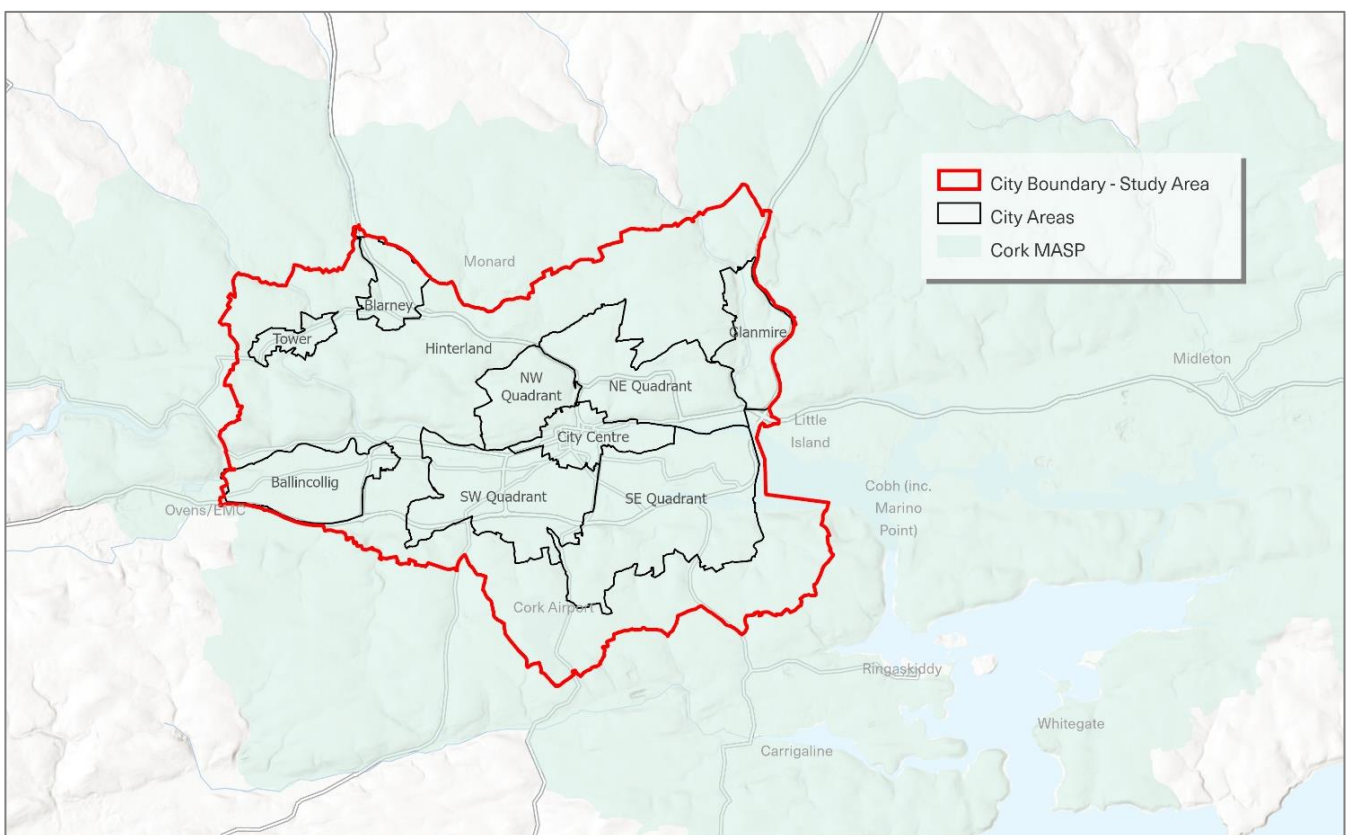


Figure 1.2 Study Area

As noted in the RSES for the Southern Region, Cork City is a sizable component part of the wider defined Cork Metropolitan Area which is governed by the Cork Metropolitan Area Strategic Plan. This has been defined in recognition that it operates as a functional economic market area which can be further developed in the future to the wider benefit of Cork and the Southern Region. The focused study area for the project is the administrative area of Cork City. Notwithstanding this, appropriate consideration has been given to wider Metropolitan Area at different parts of the study.

The administrative boundary of Cork City was extended in May 2019. As part of the preparation of the new Development Plan, the Council have structured the city into newly defined areas, comprising the following:

- City Centre;
- City Suburbs (Northeast, Northwest, Southeast and Southwest);
- Urban Towns (Ballincollig, Tower, Blarney and Glanmire), and;
- City Hinterland.

With a clear spatial emphasis on this study, the research and analysis undertaken has disaggregated on this basis of these sub-areas.

## 1.5 Report Structure

The report is structured as follows:

- **Policy Context (Chapter 2):** A review of the relevant national, regional and local planning policy documents, employment studies and economic development strategies.
- **Socio Economic Profile (Chapter 3):** A profile of Cork City based on employment-based socio-economic indicators.
- **Employment Space Overview (Chapter 4):** Review of Cork Office and Industrial/ Manufacturing/Warehouse markets reviewing the existing supply, spatial distribution, quality and vacancy.
- **Land Use Zoning (Chapter 5):** A review of the existing position in respect of land use zoning in Cork City.
- **Baseline Review (Chapter 6):** A characterisation of the existing employment position in Cork City based on preceding chapters.
- **Future Employment Land Requirements (Chapter 7):** Commentary on market supply and demand and quantitative forecasting of future employment floorspace and land requirements.
- **Future Supply and Development Locations (Chapter 8):** Definition of site requirements and identification of future employment focus locations.
- **Strategy Recommendations (Section 9):** Overall recommendations to inform potential policy approaches in relation to the future employment strategy in the emerging Development Plan.

# 02. Strategic Policy Context

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This chapter provides a summary overview of relevant national, regional and local policy, as well as economic and employment strategies which have shaped the preparation of this report.

## 2.1 Policy Overview

The planning policy context in Cork has been rapidly evolving in recent years with the publication of the National Planning Framework in 2018 and more recently the release of The Regional Spatial and Economic Strategy (RSES) for the Southern Region, the draft Cork Metropolitan Area Strategic Plan (MASP) and the Cork Metropolitan Area Transport Strategy (CMATS). The NPF set the scene for a rapid expansion of the City's population over the coming two decades. The RSES has further expanded on these growth objectives and outlines guiding principles in terms of strategic employment growth. A number of common themes have emerged among all policies namely:

- The need to ensure that there is a strong coordination between land use and transport planning.
- Ensuring that identified locations for strategic employment are infrastructure-led.
- That traditional models of delivering employment lands need to be revisited with an approach that is orientated towards placemaking and meeting the needs of the modern workforce.
- Areas for growth and smart specialization should be further explored, as well as the potential to partner with existing third level and healthcare institutions to achieve synergies.
- Encouraging the growth of clusters and co-location of Small and Medium size Enterprises (SMEs) with Multi National Corporations (MNCs) to enhance mutual benefits to both.

## 2.2 National Policy

### 2.2.1 PROJECT IRELAND 2040: NATIONAL PLANNING FRAMEWORK

The National Planning Framework (NPF) envisages that by 2040 there will be an extra 1 million people living in the country with the majority of this growth expected to occur within Ireland's five main cities.

Table 4.1 in the NPF targets population growth for Cork City and Suburbs of between 105,000 and 125,000,

A number of National Policy Objectives relate to strategic employment including NPO 10a and 10b.

#### ***National Policy Objective 10a***

*Regional and Local Authorities to identify and quantify locations for strategic employment development in the cities identified in Table 4.1.*

**National Policy Objective 10b**

*Regional and Local Authorities to identify and quantify locations for strategic employment development, where suitable, in urban and rural areas generally.*

The NPF also identifies several key growth enablers for Cork including:

*Creating the conditions to attract and retain talented innovators and entrepreneurs in order to grow and diversify Cork's employment base.*

The framework establishes that the approach to supporting strategic employment growth at regional, metropolitan and local level should include considerations of:

- 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.

## **2.2.2 FUTURE JOBS IRELAND 2019**

The 2019 Government strategy is based around the recognition that policy requires a shift away from focusing simply on quantity of jobs to quality jobs that will be resilient into the future. The document outlines five pillars of emphasis in respect of this:

- 1. Embracing Innovation and Technological Change*
- 2. Improving SME Productivity*
- 3. Enhancing Skills and Developing and Attracting Talent*
- 4. Increasing Participation in the Labour Force*
- 5. Transitioning to a Low Carbon Economy*

Among the deliverables included in Pillar 2, Improving SME Productivity include:

*Encourage the growth of clusters where enterprises can grow and help each other and deepen linkages between foreign and Irish owned businesses*

Pillar 4 aims include, inter alia, to foster participation in the labour force through flexible working solutions and Improving incentives to participate in the labour force.

### 2.2.3 REMOTE WORK IN IRELAND: FUTURE JOBS 2019

The research behind the delivery of this report was a deliverable under Pillar 4 of Future Jobs Ireland 2019, which is concerned with increasing participation in the labour force.

The document identifies two types of remote working solutions:

1. *Homeworking – The conventional model whereby employees work from their homes. This can include people who work solely from home and those who work from home some or most of the time.*
2. *Hub-working – This is an arrangement where an employee works from a hub close to or within their local community, either exclusively or some of the time. This includes co-working, which involves attendance at a co-working space where collaboration and networking outside of one's team or organisation is encouraged.*

With 'Powering the Regions' Enterprise Ireland also launched the #Worksmartchallenge, a three-year campaign to financially support 10,000 co-working and incubation spaces in regional locations including 1,400 in the south of the country.

### 2.2.4 IRELAND'S NATIONAL RECOVERY AND RESILIENCE PLAN

The National Recovery and Resilience Plan was published in June 2021 as part of Europe's shared response to the severe health and economic crisis caused by COVID-19. The overall objective of the plan is to contribute to a sustainable recovery effort, in a manner that complements and supports the Government's broader recovery efforts. A key pillar of the plan is 'Social and Economic Recovery and Job Creation' with a recognised importance in creating neighbourhoods with ease of access to jobs and housing.

## 2.3 Regional Policy

### 2.3.1 SOUTH-WEST REGIONAL ENTERPRISE PLAN

The South-West Regional Enterprise Plan is one of nine such Plans that have emerged from a process to refresh and refocus the Regional Action Plan for Jobs initiative which originally focused on the 2015-2017/2018 period. The plan establishes 6 strategic objectives for the Cork City, Cork County and Kerry area, including:

- Strategic Objective 1: Build capability and resilience in the region's enterprise base.
- Strategic Objective 2: Develop the region's enterprise hubs.
- Strategic Objective 3: Leverage the opportunities offered through business clustering to drive enterprise performance and resilience in the South-West (including a focus on building internationalisation capability amongst indigenous companies).

Key identified actions in the plan include the need to support the development of key strategic sites within the region to ensure capacity for enterprise development and growth; the establishment of a network of tech and enterprise hubs in the region; and the creation and strengthening of business clustering initiatives.

### 2.3.2 REGIONAL SPATIAL AND ECONOMIC STRATEGY FOR THE SOUTHERN REGION 2020

The Economic Strategy outlined in the RSES is based around a vision for the region to enable sustainable, competitive, inclusive and resilient growth. In relation to global challenges such as Brexit, the strategy indicates that:

*it is important that the Region sustains what we have in the immediate term, transforms our enterprise base for longer term resilience while managing potential vulnerabilities.*

The RSES seeks to achieve the above vision through the following economic principles:

- Smart Specialisation
- Clustering
- Placemaking for enterprise development
- Knowledge Diffusion, and
- Capacity Building

In relation to placemaking for enterprise development, the RSES refers to emerging trends whereby skilled workers are opting to live in locations with a high quality of life, with companies tending to follow suit. Placemaking policy is therefore seen as instrumental to ensuring that the Region captures sufficient human capital and talent. Examples of placemaking policies include:

- Continuous flow of infrastructure investments in public transport to ensure connectivity and accessibility.
- Provision of high quality public services and community amenities.
- Provision of social infrastructure in health, housing, and education.
- Provision of green spaces, creative spaces and cultural amenities.
- Provision of third level infrastructure, lifelong learning and skills development opportunities.

The RSES includes Guiding principles for Local Authorities in terms of identifying locations for strategic employment development including:

- Identifying location of technology and innovation poles (ICTs and universities) as key strategic sites for high-potential growth of economic activity.
- Identifying locations for expansion of existing enterprises.
- Securing 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.
- Exploring 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, identifying where significant job provision can be catered for through infrastructure servicing and proximity to transport interchanges, particularly public transport.
- An assessment of the phasing of development in association with the planned delivery of water and wastewater 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.
- Focus on areas that would address employment blackspots/legacies.
- Support existing sectoral and location-based strengths and synergies with existing employers

### 2.3.3 CORK METROPOLITAN AREA STRATEGIC PLAN (MASP)

Published in conjunction with the RSES, the Cork MASP positions the Cork Metropolitan Area as a primary driver of economic and population growth in the region and a city region focusing growth on the delivery of sustainable transport patterns.

The MASP outlines a number of guiding principles for the metropolitan area including

***Employment density in the right places:** Re-intensify employment within the city and suburbs, activate strategic employment opportunities to complement existing employment hubs in the city and metropolitan area. Recognise the variety of established manufacturing operations/hubs and FDI investments around the city in the metropolitan area and seek to improve sustainable transport connectivity to these locations*

Enablers for the Cork MASP include

*Delivering ambitious large-scale, mixed-use regeneration projects in Cork Docklands (City Docks and Tivoli) as integrated, sustainable developments including the provision of supporting infrastructure (rapid transit, transport infrastructure in particular Eastern Gateway Bridge, and public realm) and the relocation of one 'Seveso' site from the City Docks and two from Tivoli Docks.*

*Development of a new science and innovation park to the west of the City, accessible by public transport.*

Cork MASP Policy Objective 7 outlines the need to

*Identify and deliver strategic locations for increased residential and employment use at public transport interchange locations relating to the proposed Light Rail Transit Route, Suburban Rail and the strategic bus network.*

### 2.3.4 CORK METROPOLITAN AREA TRANSPORT STRATEGY 2040

CMATS represents a coordinated land use and transport strategy for the Cork Metropolitan Area. It sets out a framework for the planning and delivery of transport infrastructure and services to support the Cork Metropolitan Area's development in the period up to 2040. From a public transport perspective, the plan outlines the following key initiatives.

- Rail Network: Strategic public transport services along the existing rail lines.

- East-West Public Transport Corridor: A strategic east-west public transport corridor from Mahon to Ballincollig via the City Centre.
- Core Bus Network: A comprehensive network of high frequency bus services providing radial services to other corridors and orbital services across the network.
- Public Transport Integration: Provision for interchange opportunities together with information provision and revised fare structures; and
- Supporting Measures: Further measures to support the delivery of the strategy, including parking management, Park and Ride, demand management, mobility management, behavioral change programmes, etc.

The strategy sets out a phased implementation plan to build the transport infrastructure in Cork over time to allow for the continued growth of the Cork Metropolitan Area. The stated short-term of objectives (1-7 years) include the delivery of the following:

- Development, design and implement BusConnects network for Cork including prioritization of specified corridors including east-west interim bus corridor (following light rail corridor alignment); Douglas Road and South Douglas Road corridor; Summerhill North / Ballyhooly Road Corridor; Holyhill (Apple Campus) to City Centre; and Dunkettle to City Centre.
- Development and completion of the primary and inter-cycle network including, inter alia, alignment of implementation with BusConnects network.
- Completion of the Dunkettle interchange; completion of the Cork City Centre Movement Strategy; appraisal and development of both Northern and Southern Distributor Roads and; appraisal of Northern Ring Road.
- Design, planning and land acquisition for all strategic park and rides.
- Completion of Cork Walking Strategy recommendations.

## 2.4 Local Policy

Following on from the Cork City boundary extension in May 2019, the new administrative area of the city is governed by planning provisions under two operative Development Plans, as well as a number of associated lower order local area plans. The type and classification of land use zoning objectives vary across these plans, the amalgamation of which will be reviewed as part of the new Cork City Development Plan 2022-2028. Further commentary on the existing land use zoning objectives is contained in Chapter 5.

### 2.4.1 CORK CITY DEVELOPMENT PLAN 2015 – 2021

The Economic Strategy chapter of the current Development Plan contains a number of objectives relating to Strategic Employment. These objectives seek in large part to maintain the primacy of the City Centre and docklands areas as the preferred locations for prime office development, whilst acknowledging the contribution of other locations to contribute to employment growth.

#### ***Objective 3.7 Strategic Employment Locations***

*The Cork City Council will support the development of the City Centre and Docklands as the primary strategic employment locations. Secondary locations in suburban areas at Blackpool/Kilbarry and Mahon also have*

*potential for growth as outlined in local area plans. There is also potential for employment intensification in the future in areas such as Tivoli, Model Farm Road and the Tramore Road area.*

## **2.4.2 CORK COUNTY MUNICIPAL DISTRICT LOCAL AREA PLANS 2017**

The expanded area of Cork City encompasses portions of three of the existing County Municipal Districts, including Ballincollig/Carrigaline, Cobh and Blarney /Macroom. The Local Area Plans for each of these Municipal Districts include employment zoning objectives for the settlements of Blarney, Ballincollig, the North and South Environs of the City, focused on the delivery of the employment strategy set out in chapter 6 of the Cork County Development Plan 2014. This includes objectives, inter alia, to ensure that new economic and employment development is concentrated in main settlements, and that opportunities are developed in tandem with the provision of transport and water services, as well as housing development.

## **2.5 Other Strategies**

### **2.5.1 DRIVING RECOVERY AND SUSTAINABLE GROWTH 2021 – 2024 (IDA IRELAND)**

The latest strategy has been published in the context of extraordinarily high uncertainty in the global economy and is based on an assumption of an uneven U-shaped recovery in the economy over the coming years. The strategy is framed through 5 interlinked pillars

- 1) *Win 800 total investments to support job creation of 50,000 and economic activity*
- 2) *Partner with clients for future growth through 170 RD&I and 130 training investments*
- 3) *Win 400 investments to advance regional development*
- 4) *Embrace a green recovery with 60 sustainability investments*
- 5) *Target a 20% increase in client expenditure in Ireland to maximise the impact of FDI*

The strategy refers to the importance of linkages between FDI clients and SMEs such as Value Chain linkages, strategic partnerships, labour mobility and demonstration effects. Geographic proximity is cited as one of the key enablers for developing these linkages or “diffusion channels” as they are referred to.

Additional upgrade works, and investment are planned for IDA Parks in the South West region to ensure a robust value proposition for clients, and IDA plans to acquire additional strategic sites for future development. Overall a target of 118 investments for the region has been set.

### **2.5.2 POWERING THE REGIONS: ENTERPRISE IRELAND REGIONAL PLAN 2019**

Enterprise Ireland classifies Cork City and County as a single region (South). Among the objectives for the South region are:

*Support Cork City’s North-Side for Business Initiative to build enterprise capacity in the area and establish a Family Business Centre of Excellence to support family enterprises and build best-practice knowledge and research.*

*Support the growth and expansion of IT@ Cork, the region's ICT cluster, to strengthen the ICT ecosystem and create 580 jobs over 3 years.*

The South Future Focus includes the following aims:

- 1,400 co-working spaces
- 1000+ new jobs
- Support new clusters including AgriTech, Blue Economy and ICT
- Drive development of new start-ups
- Enhance R&D and innovation

# 03. Socio Economic Profile

This section profiles Cork City using key socio-economic indicators. This analysis has been undertaken to garner an understanding of local economic strengths and weaknesses that may influence future employment requirements.

The analysis provides a city-wide overview with disaggregated commentary on the defined city centre, city suburbs, urban towns and city hinterland areas. To provide a comparative assessment Cork City is benchmarked against the wider Cork Metropolitan Area, Dublin City and national averages in some areas.

## 3.1 Population

Demand for employment sites and premises will be driven in part by the resident population. Census population data from 2016 shows that Cork City has grown from 200,612 persons in 2011 to 210,853 in 2016, a 5.1% increase over the five-year time period. This is higher than the national average of 3.7% but lower than growth rates in Dublin City which experienced an increase of 5.6% over the same period.

A review of the spatial distribution of population growth highlights variances across different geographic parts of the city. The southeast suburban quadrant was the lowest performing area exhibiting population growth of only 1.17% between 2011 and 2016, followed by the north-west suburban area (3.22%) and Tower (3.48%). The rate of increase in these areas was notably less than others including the City Centre (12.26%) and the south-west suburban quadrant (9.52%), with the percentage rate of population increase in Glanmire (11.27%) the highest of all the designated urban towns.

Areas	2011	2016	% Pop. Change	% of Overall Pop.
City Centre	21,547	24,188	12.26%	12% *
<i>All Suburb Quadrants</i>				
NW Quadrant	22,608	23,336	3.22%	67.5%
NE Quadrant	24,984	25,996	4.05%	
SW Quadrant	36,927	40,442	9.52%	
SE Quadrant	51,007	51,605	1.17%	
<i>Urban Towns</i>				
Ballincollig	17,368	18,159	4.55%	16%

Glanmire	8,924	9,930	11.27%	
Tower	3,306	3,421	3.48%	
Blarney	2,437	2,539	4.19%	
Hinterland	10,439	10,521	*	7.8%
Cork City Overall	200,612	210,853	5.10%	
Dublin City Overall	1,273,069	1,345,402	5.68%	
State	4,588,252	4,761,865	3.78%	

Figure 3.1 Population change 2011-2016 by disaggregated area, CSO Census of Population

### 3.2 Workforce and Employment

The labour force participation rate is the number of persons who are employed or unemployed but looking for a job divided by the total working-age population. The 2016 census figures show that Cork City has a labour force participation rate of 58.6% (101,587 persons). This proportion is slightly lower than the percentage for the Cork MASP (59.9%) and notably lower than the national average percentage of 61.4%. For context, the average participation rate across the Dublin local authority administrative areas is 63.5%.

In 2016, there were approximately 89,000 residents in employment in Cork City. At 88% of the total population, this is broadly the same as the percentage for the Cork MASP (89%), the state (87%), and Dublin local authorities as a whole (89%). However, the relatively high rate of economic activity does mask differences across areas. Cork City Centre has a jobs to resident worker ratio of 2.26 but an unemployment rate of 15.2%. The northwest suburb has almost 1 job per resident worker, but at 23%, the unemployment rate was the highest in the city. The southwest and hinterland areas display very positive jobs to resident worker ratios.

Area	Jobs	Resident Workers	Jobs to Resident Worker Ratio	% Unemployment
City Centre	27,128	12,003	2.260	15.2
NW Quadrant	7,963	8,012	0.994	23.0
NE Quadrant	11,276	10,629	1.061	15.5
SW Quadrant	26,500	14,926	1.775	12.3
SE Quadrant	19,127	23,684	0.808	7.8
Urban Towns	8,148	14,226	0.573	7.9

Hinterland	8,717	5,523	1,578	6.7
City Overall	108,859	88,998	1,223	12.1

3.1.1.1 Table 3.4.2 Jobs, Resident Workers and Unemployment Rate by Area 2016<sup>4</sup>

The geographical distribution of jobs based on Census 2016 workplace zones (Census 2016) is mapped below. It illustrates that the small areas which include Apple's European Headquarters and Cork University Hospital have the greatest number of jobs, with CIT, Kinsale Road and Mahon among other notable employment hotspots. This dataset also highlights that the number of jobs per small area is low in the City Centre compared to other locations raising valid questions in terms of efficiency of use of employment land.

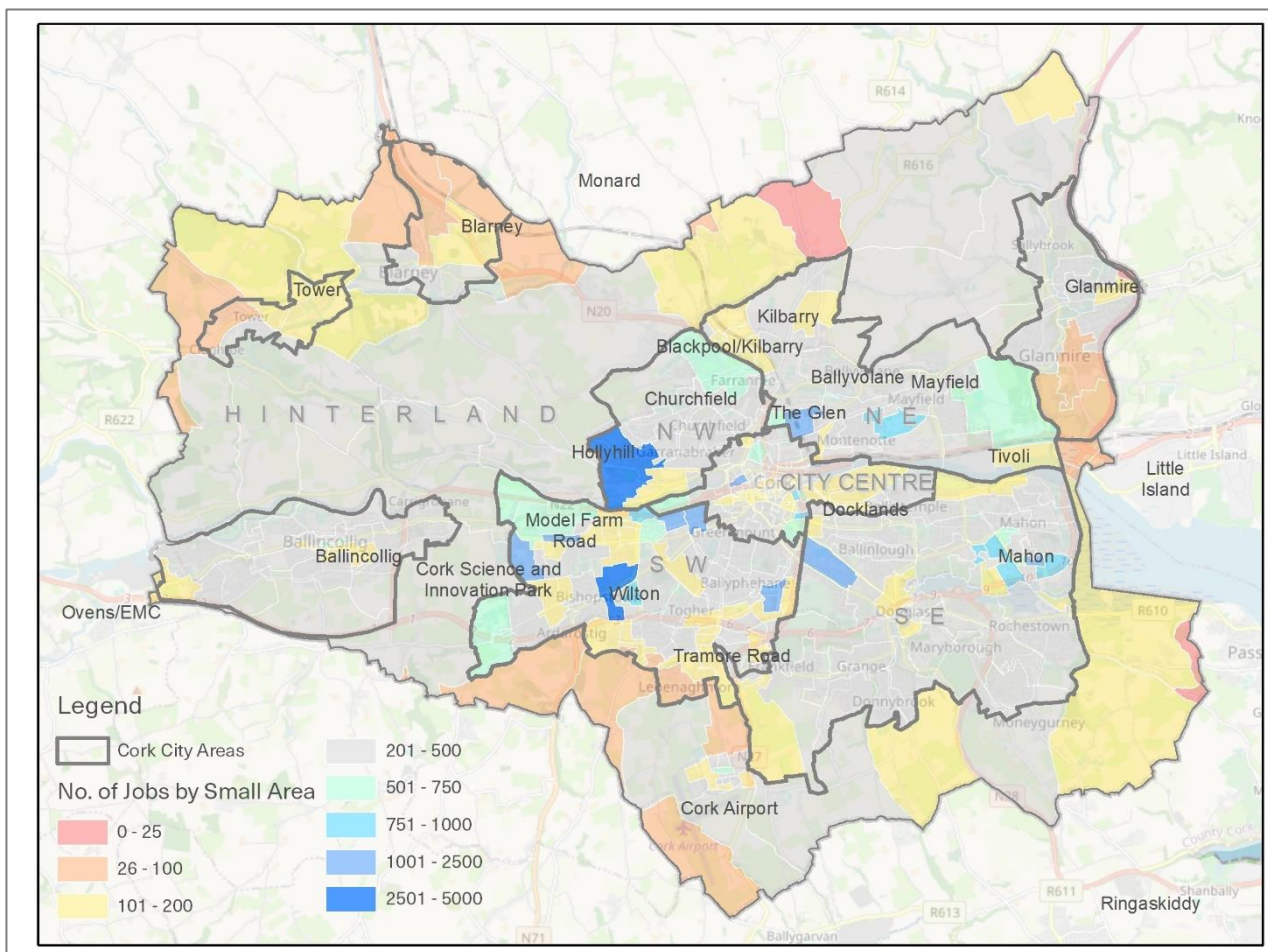


Figure 3.2 Number of Jobs by CSO Workplace Zone 2016

The spatial analysis suggests that a number of large employment locations are situated proximate to areas of high unemployment. To confirm this corollary, areas with high unemployment rates were overlaid with identified workplace zones of 500+ jobs. Figure 3.3. shows a clear juxtaposition between these metrics in a number of areas, particularly in the northside of the city as well as Mahon in the southwest where there are patterns of high job numbers within and adjacent to areas of high unemployment.

<sup>4</sup> Data based on CSO 2016 Small Area data. Where Small Area boundaries did not coincide City Areas the census value was allocated based on the proportion of the area that fell within the City Area.

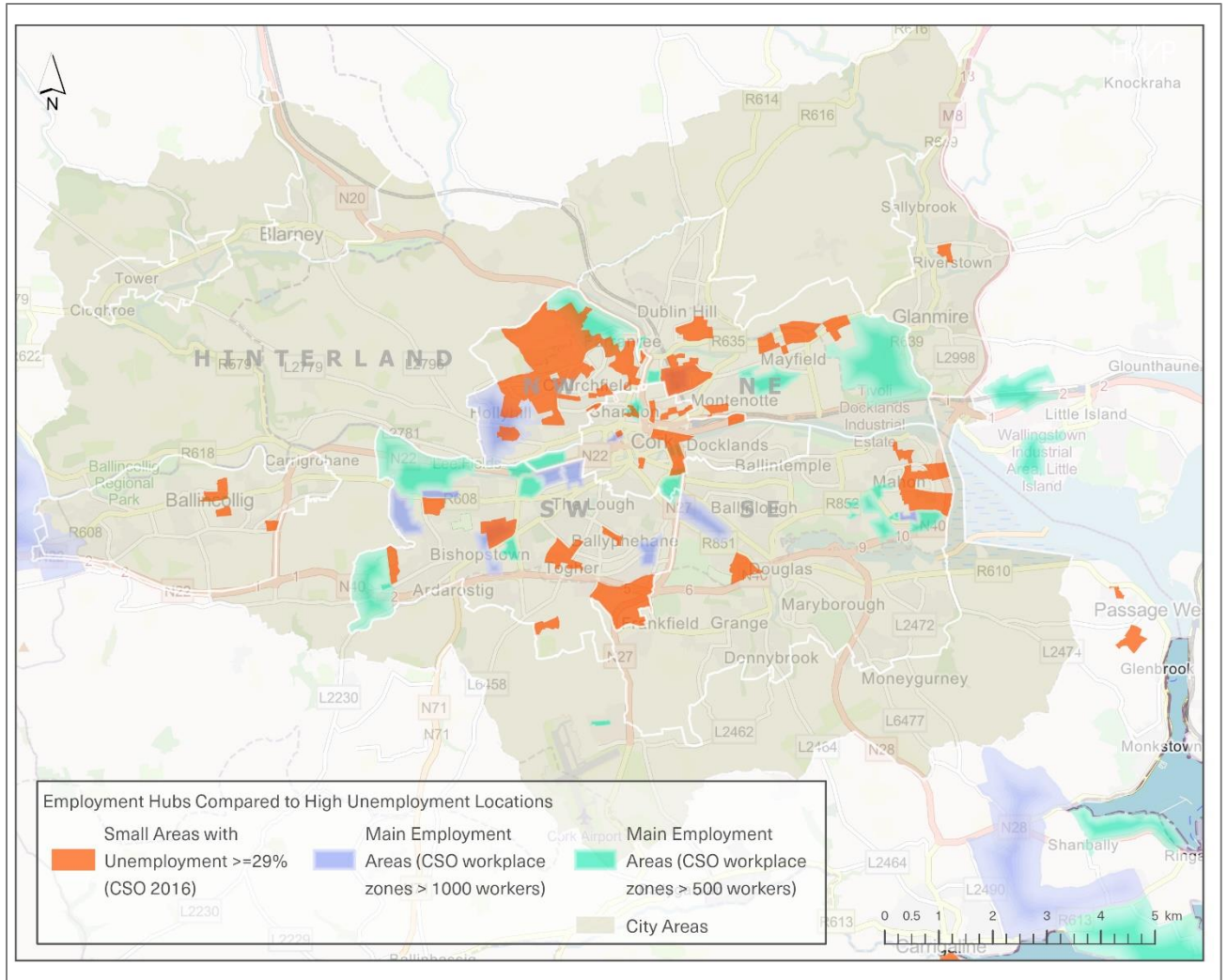


Figure 3.3 Relationship between areas with high job numbers and high unemployment

### 3.3 Employment Types

The table below establishes the percentage breakdown of the types of jobs that exist in different parts of Cork, and secondly, compares this figure with the percentage of resident workers in that area employed in that job category.

It highlights that while the number of residents employed in manufacturing is fairly consistent across all parts of the city (between 12-16%), the majority of areas underprovide for jobs in this category. The exception is the north-west quadrant, with 41.4% of all recorded jobs having a manufacturing base. The percentage of local residents engaged in employment in this sector is only 15.2%.

In the south-west quadrant 42.6% of the local jobs are categorised as professional or other service areas, more than double the proportion of this category of jobs in the north-west quadrant and almost triple the proportion in the City Hinterland. There is a correspondingly high level of local workers in this sector in the southwest sub area.

The hinterland, southeast quadrant, urban towns and the City Centre all have significantly more jobs in the 'information and communication, financial jobs' sector than the overall city average. In all areas the proportion of jobs in this sector exceeds the proportion of locals employed in the sector.



	Manufacturing Jobs (%)	Manufacturing Workers (%)	Information & Communication, Financial Jobs * (%)	Communication, Transport Workers *	Public Admin Jobs (%)	Public Admin Workers (%)	Professional & Other Services Jobs (%)	Professional & Other Services Workers (%)
City Centre	5.5	14.7	23.5	10.8	7.5	2.4	27.9	20.0
NW Quadrant	41.4	15.2	9.4	8.6	2.4	4.0	20.1	23.0
NE Quadrant	9.1	15.1	16.4	9.5	12.8	4.8	27.2	22.6
SW Quadrant	12.1	12.4	12.3	8.4	5.7	4.6	42.6	30.4
SE Quadrant	8.6	16.0	30.4	9.9	4.7	4.4	24.2	26.3
Urban Towns	6.3	16.1	27.2	10.8	2.2	5.6	24.7	24.8
Hinterland	11.1	15.2	32.6	8.6	1.7	5.1	15.4	25.5
Cork City Overall	11.2	14.9	21.2	9.7	5.8	4.4	28.9	25.1

Figure 3.4 Percentage Breakdown of Job Types by Area

The table below summarises recorded changes in employment numbers for resident workers over the last intercensal period. With 6,448 jobs, manufacturing accounted for the largest employment sector in 2016, but the larger gains in job numbers were experienced in 'professional, scientific and technical activities' and the 'information and communication' sectors.

Resident Workers Employment Sector	2011 – 2016 Change in Resident Workers (2016 figure) <sup>5</sup>
Manufacturing	21% (6,448)
Professional, scientific and technical activities	51% (3,351)
Information and communication	57% (3,056)
Administrative and support service activities	25% (2,608)

<sup>5</sup> Based on CSO 2016 Census Data - Profile 11 - Employment, Occupations and Industry - Population Aged 15 Years and Over in the Labour Force 2011 to 2016 by Local Authority.

Public administration and defence; compulsory social security	-2% (2,069)
Other service activities	13% (1,209)
Financial and insurance activities	-8% (1,077)
Real estate activities	4% (168)

Figure 3.5 Cork City Resident Workforce Occupation Trends and Jobs Trends 2011 - 2016

### 3.4 Skills and Training

Table 3.5 compares levels of educational attainment of residents in each sub area relative to the qualifications of people working in these areas based on defined CSO workplace zones. It highlights that while the overall percentage of the population with third level qualifications is higher than state and Dublin averages, attainment levels are much lower in the north of the city. Most notably, it also indicates that the percentage of people who hold jobs in each sub area and have a third level qualification is much higher than the resident population averages. It confirms initial views that there is a contrast between jobs available and the qualifications needed to access those jobs in some areas.

	% Population Over 15 with Third Level Qualification (Degree or Above)	% of Persons in Jobs with Third Level Qualification (Degree or Above)	Ratio
City Centre	36.5	60.9	1.7
NW Quadrant	11.1	52.0	4.7
NE Quadrant	21.6	48.8	2.3
SW Quadrant	32.5	60.9	1.9
SE Quadrant	42.3	62.2	1.5
Urban Towns	35.8	56.5	1.6
Hinterland	36.5	63.4	1.7
Cork City Overall	37.2	59.1	1.6
Dublin Metro Area	36.1		
State Average	28.4		

Figure 3.6 Population with Third Level Qualifications (NFQ7-10) 2016

### 3.5 Travel to Work

A review of CSO Census of Population 2016 POWSCAR data confirms that the city centre, south-west suburbs and hinterland are net importers of workers on a daily basis, with all other sub areas net exporters<sup>6</sup>. It indicates significant trends of cross-city movements for work purposes with the majority of people employed in locations which are different to where they reside. This is also reflected in average commute times to place of work and mode of transport for these journeys. The average commute time in Cork City is 26 minutes which is below the state (28.2 minutes) and Dublin averages (28.9 minutes). Within this is little notable variation in these travel times across the different sub areas in Cork City. The car and van are the dominant mode of travel to work accounting for 66% of all trips, with this mode more prominent in the South-east (74%), urban towns (75%) and Hinterland sub areas (72%).

Net Flow of Jobs by Area	
(+ is an importer of workers, - is an exporter of workers)	
City Centre	+13,404
North West Suburb	-1,653
North East Suburb	-1,369
South West Suburb	+9,401
South East Suburb	-7,444
Urban Towns	-7,989
Hinterland	+5,738

Figure 3.7 Net Flows of Jobs by Sub Area

### 3.6 Other Metrics

The preparation of this Chapter also extended to the review of published background research which informed the preparation of key policy documents, including the National Planning Framework. The ESRI report ‘Prospects for Irish Regions and Counties’ 2018 identifies that Cork has the highest number of foreign owned firms per capita in Ireland<sup>7</sup>, and with the exception of Dublin, has a considerably higher net output per worker than other parts of Ireland. The latter is principally attributed to the former, and the presence of internationally owned businesses.

<sup>6</sup> Data extracted from Cork City Neighbourhood Profiles prepared for Cork City Council by AIRO, 2021.

<sup>7</sup> A rate of 0.065 jobs per capita, as per Figure 6.6 of the ESRI Report. Dublin has the largest share of total foreign jobs but not per capita of population.

# 04. Employment Space Overview

This section examines the Cork Office and Industrial/ Manufacturing/Warehouse markets reviewing the existing supply, spatial distribution, quality and vacancy within the Cork City Council jurisdiction. The findings are based on data sets developed by Savills which have been refined to adhere to the relevant areas/quadrants as defined by Cork City Council. This section represents a comprehensive market overview combined with relevant up to date market knowledge as of Q4 2020.

## 4.1 Existing Office Market

The Cork Office Market extends in total to approximately 637,929 sq m of which 577,740 sq m are located within the Cork City Council administrative areas. The difference between the office built stock in the City Council Area versus the entire office market is predominately due to office stock in Little Island, the majority of which is situated in Eastgate Business Park.

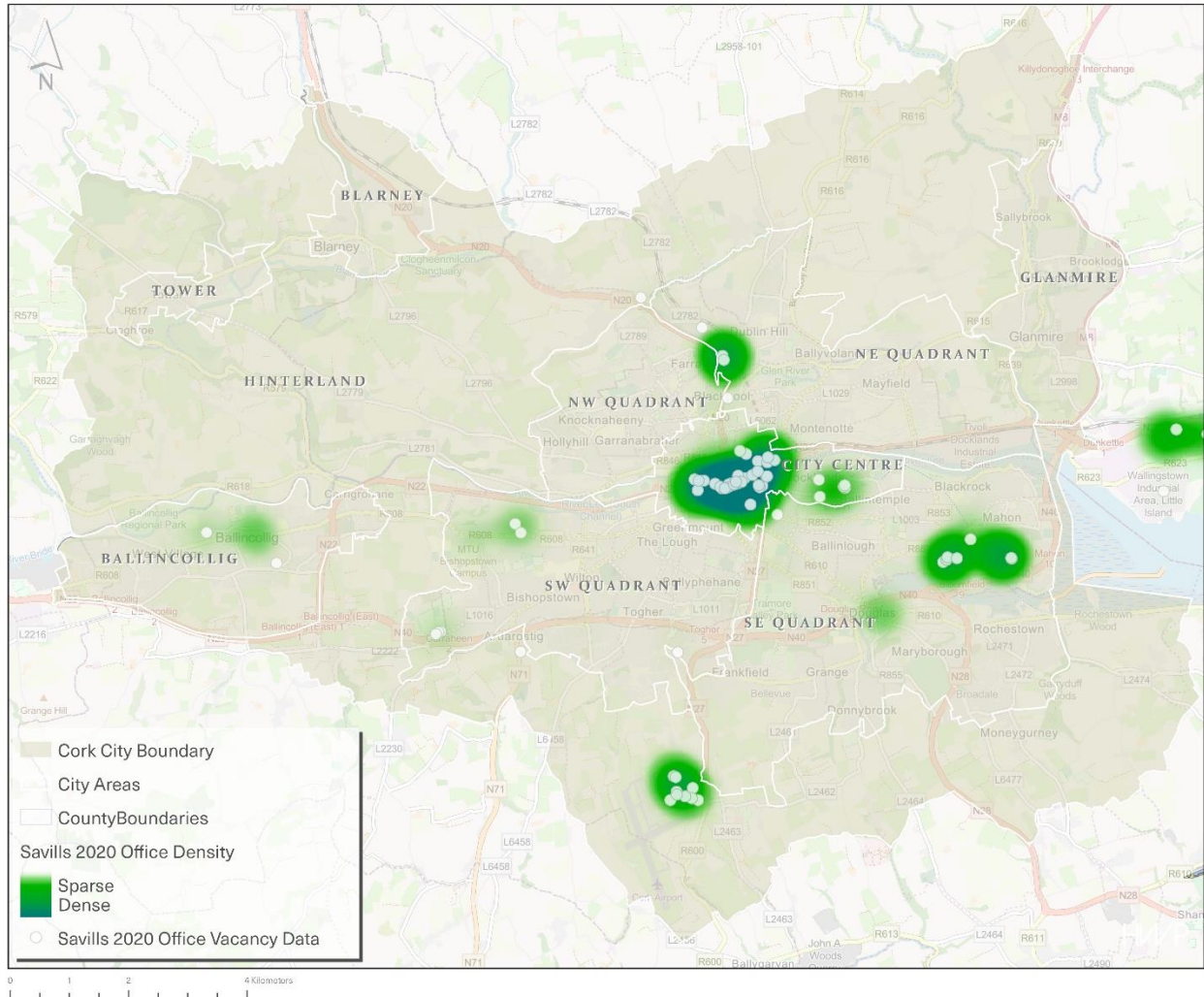
The distribution of the Cork office market contained within the City Council jurisdiction is set out in table 1 in line with the recognised districts.

Location	Total Stock Sq m	% of Total Stock
South-West Quadrant	39,538	6.84%
South-East Quadrant	114,831	19.88%
North-East Quadrant	26,065	4.51%
North-West Quadrant	48,845	8.45%
City Centre	257,221	44.52%
City Hinterland	63,902	11.06%
Urban Towns	27,338	4.73%
Total	577,740	100%

Figure 4.1 Breakdown of Existing Office Floorspace by Sub Area

The below map clearly sets out the spatial distribution of Cork City's office stock. It is evident that Cork City Centre accounts for the largest quantum of office stock at 44.52%. This centre city focused supply is to be expected, influenced by factors including locational

preferences and sector identity. Second to the City Centre in terms of supply is the South-East City suburb encompassing areas such as Mahon and Blackrock with offices at City Gate and City Gate Park a key driver to supply in this area. Following this is City Hinterland with supply predominately driven by the office stock in the Cork Airport Business Park.



**Figure 4.2** Geographical Distribution of Existing Office Floorspace in Cork City

When we classify the supply of office accommodation, most of the office stock, 297,929 sqm can be categorised as Grade B<sup>8</sup>. Much of this grade B office stock is attributable to business park locations on the periphery of the City Centre and to office developments constructed in the early 2000's. These grade B buildings were built to a specification in line with market expectations for office stock at the time. The specification and building regulations applicable to new office buildings is much higher with a greater emphasis on sustainability, energy performance, cloud connectivity and occupier health/ wellbeing. Standard certifications of LEED or BREAM, Wired Score, NZEB and more recently Well certification are now expected types of benchmarks by occupiers.

<sup>8</sup> Classification is based on Savills grading system reflecting attractiveness to the market. Refer to Appendix A.

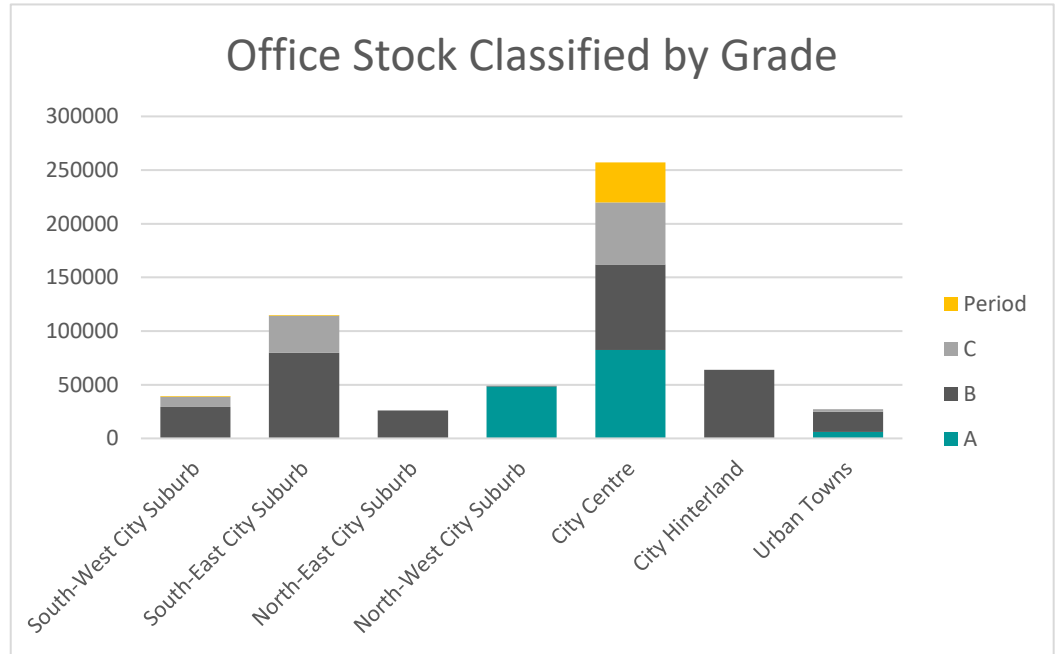


Figure 4.3 Office Stock by Savills Grade Classification

The City Centre has the highest concentration of Grade A office accommodation which has increased significantly over the last five years with the development of 1 Albert Quay, The Capitol, Navigation Square (NSQ1 & NSQ2), 85 South Mall, No.1 Horgan’s Quay, Penrose Dock and The Counting House. The development of new office stock has seen some companies opt to relocate from suburban locations to the City Centre due in part to the availability of quality office stock but also the wide variety of amenities which the City Centre offers. 2020 was the first year in a significant period where there is a quantum of Grade A office options with standing stock offering immediate availability to meet immediate occupier demand.

## 4.2 Existing Industrial Market

The Cork Industrial market extends in total to approximately 1,942,448 sq m of which 965,159 sq m or just less than 50% is located within the Cork City Council administrative area. Little Island and Ringaskiddy are key industrial/ manufacturing areas within the context of the Cork market. The nature and type of uses associated with industrial property means they are more suitable to fringe locations with strong transport links. Table 2 sets out the spatial distribution of Cork City’s industrial/ manufacturing stock.

Location	Total Stock Sq m	% of Total Stock
South-West Quadrant	366,566	38.0%
South-East Quadrant	99,936	10.4%
North-East City Quadrant	163,875	17.0%
North-West City Quadrant	88,126	9.1%
City Centre	136,121	14.1%

City Hinterland	18,206	1.9%
Urban Towns	92,329	9.6%
<b>Total</b>	<b>965,159</b>	<b>100%</b>

Figure 4.4 Breakdown of Existing Industrial Floorspace by Sub Area

Within the City Council jurisdiction the stock of industrial/ manufacturing space is condensed into a number of key clusters predominately to the north of the City (Blackpool/ Dublin Hill), the City Centre (South Docklands) and to the south (north and south of the N40 South Ring Road). See extract map below.

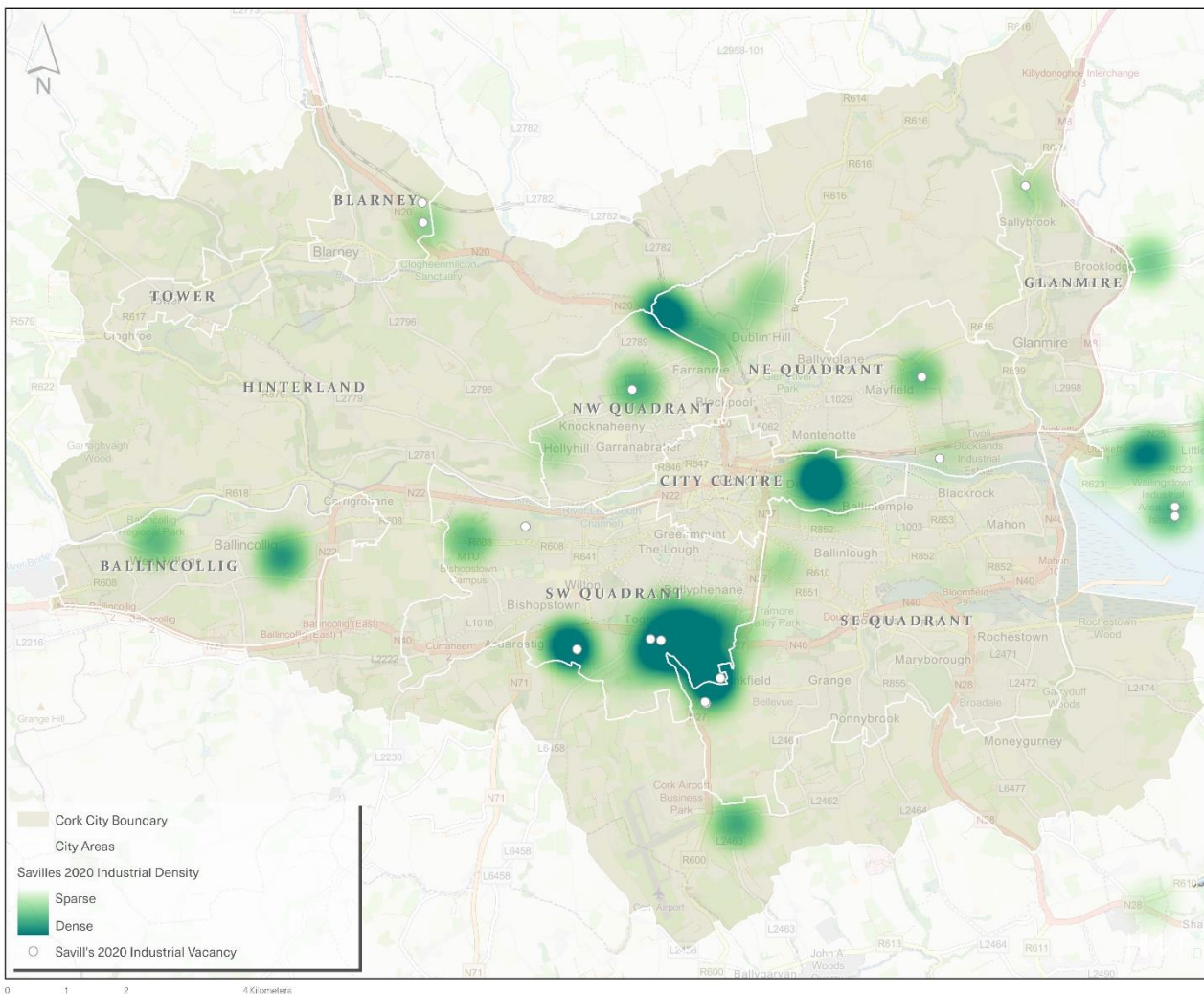


Figure 4.5 Geographical Distribution of Existing Industrial Floorspace in Cork City

When the stock of industrial floor space is distilled down it is clear that the South West City Suburb has the highest volume of industrial stock. The stock is largely centred in the area both north and south of the N40 South Ring Road between the Kinsale Road Roundabout and the Wilton Road roundabout. Much of the stock in this area is older low-grade buildings which are categorised as grade B and C stock with limited high-quality stock available. This location is highly sought after from a trade warehousing perspective due to its accessibility and proximity to the surrounding residential areas.

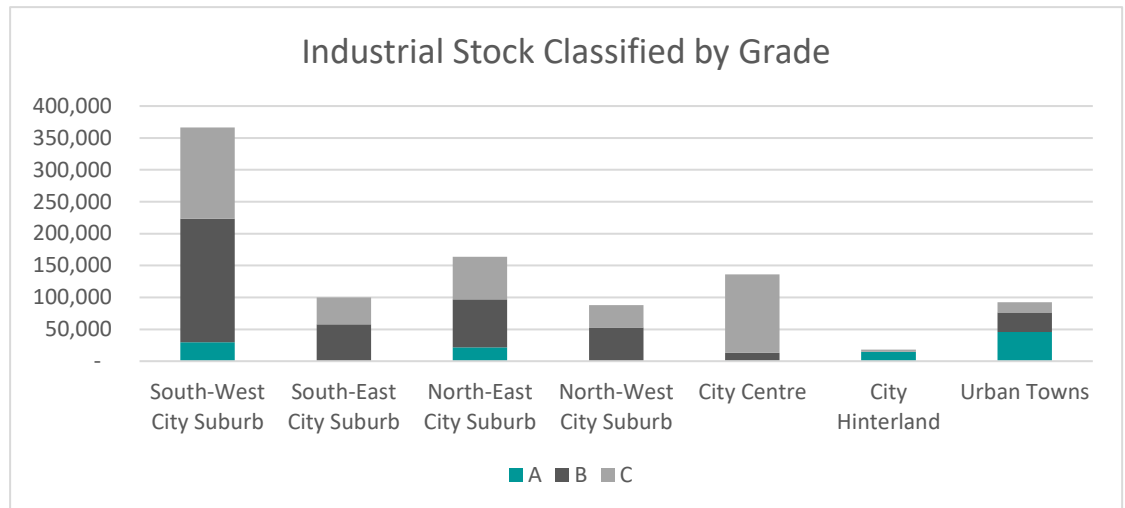


Figure 4.6 Industrial Stock by Savills Grade Classification

The North East City Suburb and City Centre are the areas with the second and third largest concentrations of industrial floor area standing stock at 17.0% and 14.1% respectively. The City Centre is concentrated around the South Docklands area along Centre Park Road and Monahan Road. The quality of stock in the City Centre is predominately grade C. The majority of this stock is in the South Docklands area that in time will be redeveloped for higher value uses. In order to redevelop the South Docklands, the existing occupiers in this low-grade industrial stock will need to be provided with viable alternatives to relocate to.

### 4.3 Development Rates and Vacancy

The last two years have seen the delivery of a substantial volume of new office stock into the Cork market predominately based in the City Centre apart from the development at Westfield Office Quarter in Ballincollig. Meanwhile the industrial/ manufacturing market saw just 7,000 sq m of new product delivered in 2020 at Blarney Business Park which is the only live development site in Cork delivering new stock to the market suitable for industrial, warehousing and manufacturing uses.

#### 4.3.1 OFFICE VACANCY

The Cork office vacancy rate as of Q4 2020 is currently 12.9% when just the City Council administrative area is considered this figure increases to 13.8%. The office market has seen a marked increase in the amount of vacant and available stock due to both the delivery of new Grade A stock which has yet to be absorbed and 'grey space' (available for sublet/assignment).

The table below sets out the distribution of current office vacancy in Cork.



Q4 2020	Vacant Sq m	% of Total Vacancy
South-West City Suburb	7,794	1.35%
South-East City Suburb	9,743	1.69%
North-East City Suburb	1,531	0.27%
North-West City Suburb	-	0.00%
City Centre	46,474	8.06%
City Hinterland	7,702	1.33%
Urban Towns	6,376	1.10%
Total Vacancy	79,620	13.80%

Figure 4.7 Office Floorspace Vacancy by Sub Area

The arrival of the Covid-19 pandemic in early 2020 has had a significant impact on the transactional markets. Wide scale working from home measures introduced during periods of heightened travel restrictions slowed leasing activity in the office market. We have seen the emergence of 'grey space', office accommodation, which is currently under lease, but which is available to the market via sub-lease or assignment. The volume of Grey space in the market has seen a noticeable increase over the second half of 2020 as companies look to shed excess space in order to right size for their needs. There is a noticeable trend that the grey space on the market is predominately in the sub 1,000 sq m bracket.

On a positive note, many of the companies with office space requirements pre-pandemic have reactivated requirements with some adjustments depending on their expected growth strategies. Going forward we are likely to see companies embracing a hybrid type working model with emphasis on collaboration space and offices which provide a great experience for staff and customers.

We have considered the spatial distribution in relation to where the vacancy lies in the office market at present which is illustrated in the below graph.

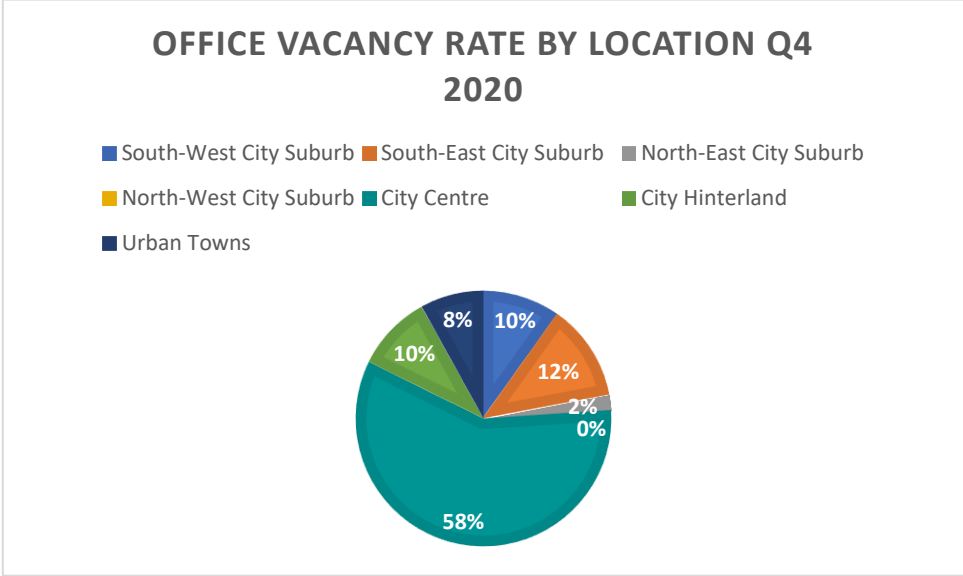


Figure 4.8 Percentage of Total Office Vacancy by Sub Area

The City Centre accounts for over half the total vacancy rate at present as new office space is delivered to the market with space yet to be committed to. As this new office space is absorbed this dynamic will change somewhat. However, as the City Centre accounts for a large proportion of the total office stock it is always likely to dominate the market in terms of the availability.

Second in terms of vacancy is the South East City suburb predominately down to one large availability in City Gate Park. The City Hinterland and South West City suburb are joint third in terms of vacancy.

**4.3.2 INDUSTRIAL VACANCY**

There is a distinct lack of availability of industrial stock in the Cork market with an overall vacancy rate 1.26%, this rate is marginally higher within the City administrative area at 1.61%. This lack of available industrial stock has hampered market activity over the last number of years. From a market perspective there seems to be a lack of quality grade B industrial stock of 1,000 – 2,000 sq m size category in prime locations to meet mid-sized market demand.

Many industrial occupiers, particular those with smaller footprints have a preference to purchase the building they occupy rather than rent. While the supply of existing stock in the market is extremely low, much of the standing industrial stock is trading at below replacement cost which makes development viability a difficult task. There is an expectation from purchasers in the industrial market that just does not align with the true cost of delivering new product. The table below sets out the availability of stock as a percentage of the total supply in the categorised Cork City Council sub areas.

Location	Vacant Sq m	% of Total Vacancy
South-West City Suburb	4,984	0.52%
South-East City Suburb	450	0.05%
North-East City Suburb	2,065	0.21%
North-West City Suburb	469	0.05%
City Centre	-	0.00%
City Hinterland	-	0.00%
Urban Towns	7,527	0.78%
<b>Total Vacancy</b>	<b>15,495</b>	<b>1.61%</b>

**Figure 4.9** Industrial Floorspace Vacancy by Sub Area

Reviewing the distribution of vacant industrial/ manufacturing stock across Cork, the Urban Towns are the highest in terms of vacant stock at 0.78%. This is predominately due to new standing stock of 7,000 sq m in Blarney Business Park. This stock has been developed to the highest specification and is actively available to lease. This stock is pitched at the higher end of the market more suited to large national and multi-national companies.

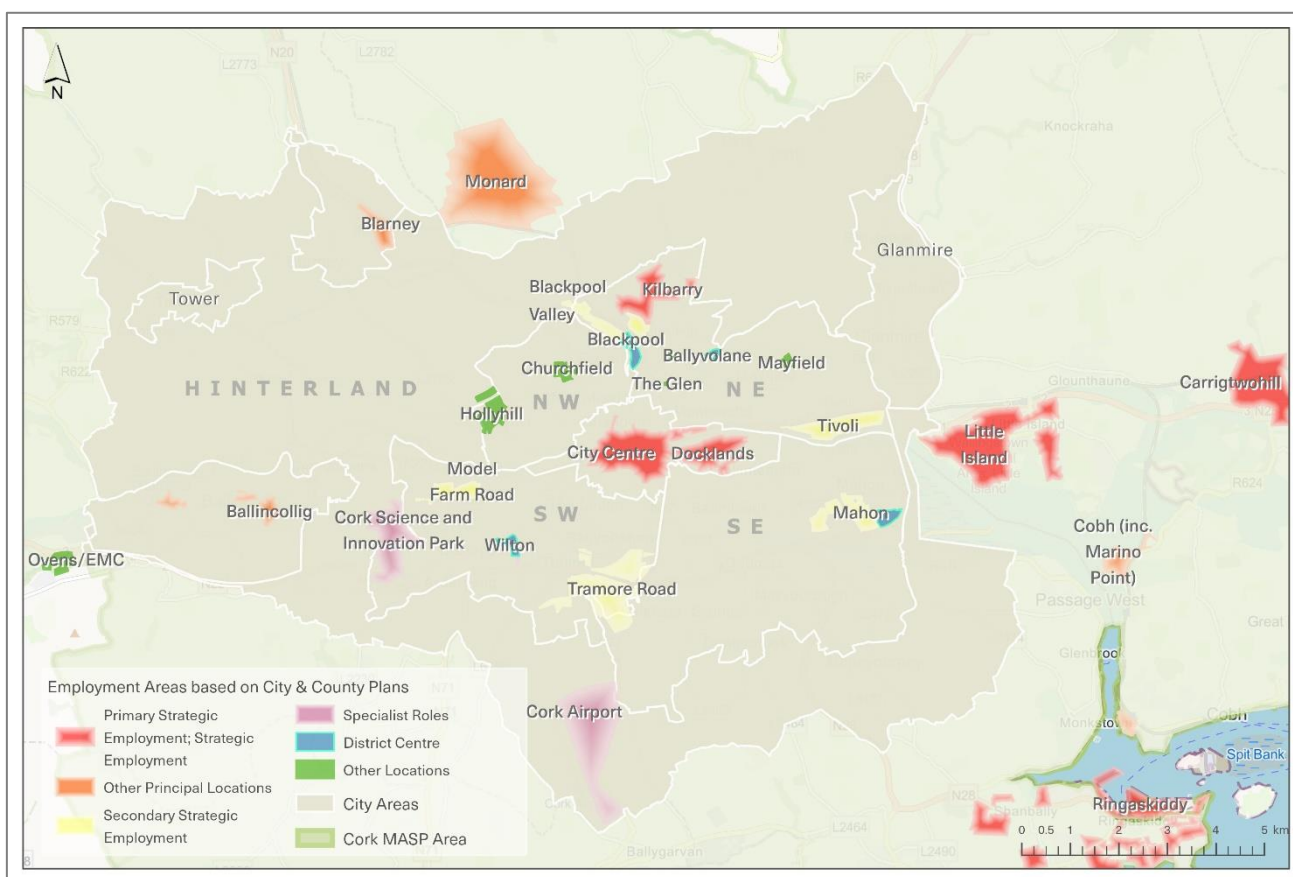
The South West City suburb has the next highest vacancy rate at just 0.52% which is to be expected given the large stock levels in this area.

The availability of industrial/ manufacturing space is extremely tight in the Cork Market at present.

# 05. Land Use Zoning

The chapter reviews the existing position in respect of land use zoning in Cork City. It establishes the amount of land that is zoned, the geography of different uses and amount of this land that is undeveloped and available. Summary information on possible strategic level development constraints is provided on a sub-area basis.

## 5.1 Existing Context



**Figure 5.1** Geographical Distribution of Zoned Employment Lands in Cork and wider MASP Area

The main employment areas in Cork City and the wider Cork MASP areas are identified in Figure 5.1. As outlined in Chapter 2, the newly defined city is governed by planning provisions under two operative Development Plans, as well as a number of associated lower order local area plans. The classification of land use zoning objectives varies across these plans comprising different forms of business, enterprise, technology, industry, mixed use and district centre classifications. For context, the complete set of zoning types is listed in the table below.

## CORK CITY DEVELOPMENT PLAN 2015

ZO 2 - City Centre Commercial Core Area (CCA)

ZO 5 - Light Industry and Related Uses – Tramore Road, Mayfield, Kilbarry, Churchfield

ZO 6 - General Industry – Tivoli (Subject to LAP)

ZO 7 - Business and Technology – Blackpool, Mahon, Model Farm Rd.

ZO 8 - District Centres (max 10,000 sq. m office) – Mahon, Blackpool, Wilton, Ballyvolane, Douglas.

ZO 9 - Neighbourhood Centres (max 100 sq. m office).

ZO 16 – Mixed Use Development – Docklands.

## CORK COUNTY MUNICIPAL DISTRICT LOCAL AREA PLANS 2017

Enterprise Zoning – Ballincollig (BG-E-01, BG-E-02)

Business Zoning – Blarney (BL-B-01, BL-B-02, BL-B-03), North Environs (NE-B-01, NE-B-02)

Industrial Zoning – Glanmire (GM-I-01), North Environs - Kilbarry (NE-I-01)

**Figure 5.2** Existing Employment Land Use Zoning Designations within Cork City

There is an obvious need to review and categorise land use zoning designations in a consistent manner across the extended administrative area of Cork City. As part of this, it will also be necessary to consider office floorspace caps related to district and local centres, and the degree to which such thresholds apply to different areas.

## 5.2 Strategic Overview

At present, there is approximately 2,184 hectares of zoned employment land in the Cork Metropolitan Area. Of this, 70% of zoned land falls into the broad category of 'industry', with 30% zoned for a form of 'office-based business' use. The newly defined Cork City contains 650.6 hectares of employment zoned lands, a 30% share of all land in the Metropolitan Area. A review of the component parts of this confirms that it comprises 72% of the 'business' zoning in the defined Metropolitan Area but only 11.6% of zoned industrial lands.

For context, Figure 5.3 below disaggregates the existing zonings by sub areas across Cork City. It confirms that largest component part of the 'business' zoning is located in the Southwest suburb owing principally to the presence of the Science and Innovation Park. When the City Centre is removed (17%), the distribution of business zoning across the other sub areas is relatively uniform at between 7-10%. Elsewhere, more than half of the 176.5 hectares of zoned industry land is located in the Hinterland (90 Ha) with the remainder mainly distributed in the western side of the city, in the Northwest and Southwest suburbs.

Hectare Zoned by Area	Commercial Core /Business/Technology/enterprise/Science & Innovation/Mixed Use (Ha)	% of MASP Total	Industry/Light Industry & Related Uses (Ha)	% of MASP Total	Total (Ha)
Overall MASP	659.2		1526.6		2185.83
City	473.8	71.9%	176.8	11.6%	650.6
City Centre	112.4	17.1%	0.0	0.0%	112.4
NW Quadrant	0.0	0.0%	39.0	2.6%	39.0
NE Quadrant	89.9	13.6%	68.2	4.5%	158
SW Quadrant	137.3	20.8%	38.0	2.5%	175.3
SE Quadrant	51.5	7.8%	0.0	0.0%	51.5
Hinterland	31.2	4.7%	31.7	2.1%	62.8
Urban Towns of Ballincollig & Blarney	51.6	7.8%	0.0	0.0%	51.6

Figure 5.3 Comparative Breakdown of Zoned Employment Land in Cork City, disaggregated by sub area

## 5.3 Sub Areas

### 5.3.1 NORTH-WEST QUADRANT

The employment related zoning in the northwest area is light industry based and focused at two locations, namely, Churchfield Business Park at Fairhill and a larger cluster to the west comprising Apple's European Headquarters, Holyhill Industrial Estate and Clogheen Business Park to the south of this.

There is a total of 39 hectares of zoned land in the area of which 2.9 hectares or 7% is presently undeveloped. Apple are continuing to expand their presence in this part of Cork City, as reflected in recent planning applications for new testing and measurement facilities.

The lands around the Apple Campus and adjoining industrial and business park are relatively well served by public transport, but topography is a factor in developing other sustainable travel modes in this area. The publication of CMATS includes for the development of the Northern Distributor Road (NDR) and Bus Connects network which will open up this area for further development. Foul and water services infrastructure are sufficient in the area to meet current demand with Irish Water upgrades currently in the pipeline that will ensure security of future supply.

### 5.3.2 NORTH-EAST QUADRANT

The principal employment zoning areas in the North-East quadrant are situated in the north in IDA owned lands at Kilbarry and the adjoining City North Business Park and West Link Business Park/Kilnap Business Park. Additional zoned area are Mayfield Industrial estate to the east, the Ballyvolane Commercial Park to the west and an undeveloped greenfield site to the north located off the R614 Ballyhooly Road. The 60 hectares Tivoli masterplan area is also included in this part of the city. The future of this area is subject to ongoing discussions but is earmarked for significant mixed-use development for housing, offices and retail outlets.

At 158 hectares, it is second only to the South-West sub-area in terms of the amount of zoned employment land. Excluding Tivoli, there are 98 hectares zoned for employment use comprising 68.2 ha of industry/light industry and 29.9 ha of business and technology lands to the north of the quadrant. In Kilbarry and Blackpool 43.15 hectares of the industry/light industry lands remain undeveloped at present, with 17.49 hectares of the business and technology lands at Kilbarry and Ballyvolane also remaining undeveloped, although it is noted that Cork City Council have identified Ellis's Yard, next to the Ballyvolane Commercial Park, as a potential traveller accommodation site.

The Kilbarry IDA land holding, located on Upper Dublin Hill, is a considerable tract of land that has restricted vehicular access from the existing roads network, specifically the skew rail bridge on lower Dublin Hill and the junction with Redforge Road (Blackpool). It is noted that the proposed Northern Distributor Road identified in CMATS will contribute to improved access in the area by means of a high-quality orbital road and associated high frequency bus service. Foul sewer provision in this area is limited but is set to be improved

as part of a recently granted planning for a large-scale foul sewer pumping station located on Ballyhooly Road.

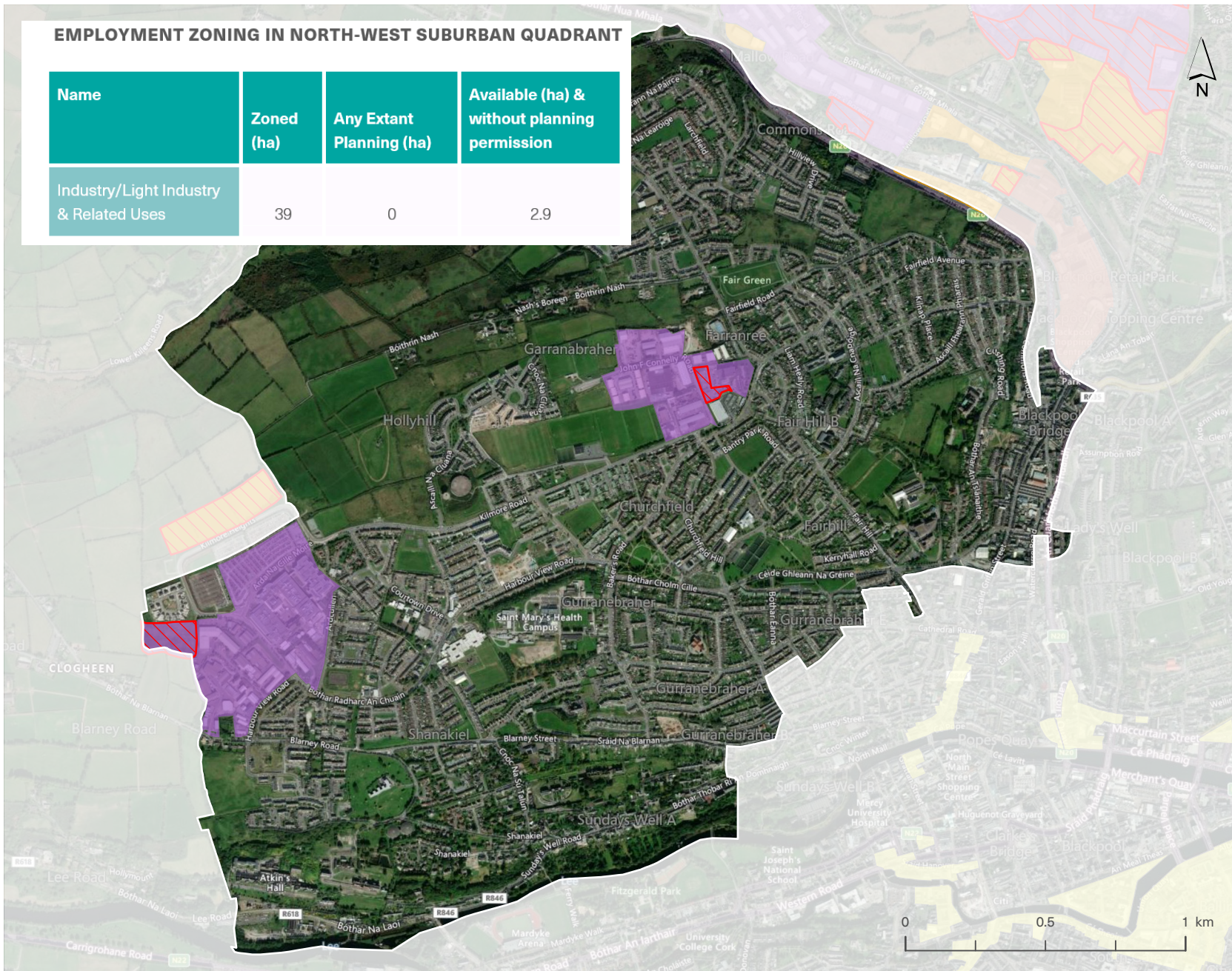
The existing Mayfield and Ballyvolane lands zoned light Industry are relatively self-contained, with limited scope for expansion from a site size point of view. Foul sewer provision is readily available within the existing network at these locations. In relation to the undeveloped Ballyhooly Road lands, foul sewer provision is currently limited here, but infrastructure is set to be improved as part of recently granted residential development locally at Longview Estate.



# NW QUADRANT

## EMPLOYMENT ZONING IN NORTH-WEST SUBURBAN QUADRANT

Name	Zoned (ha)	Any Extant Planning (ha)	Available (ha) & without planning permission
Industry/Light Industry & Related Uses	39	0	2.9

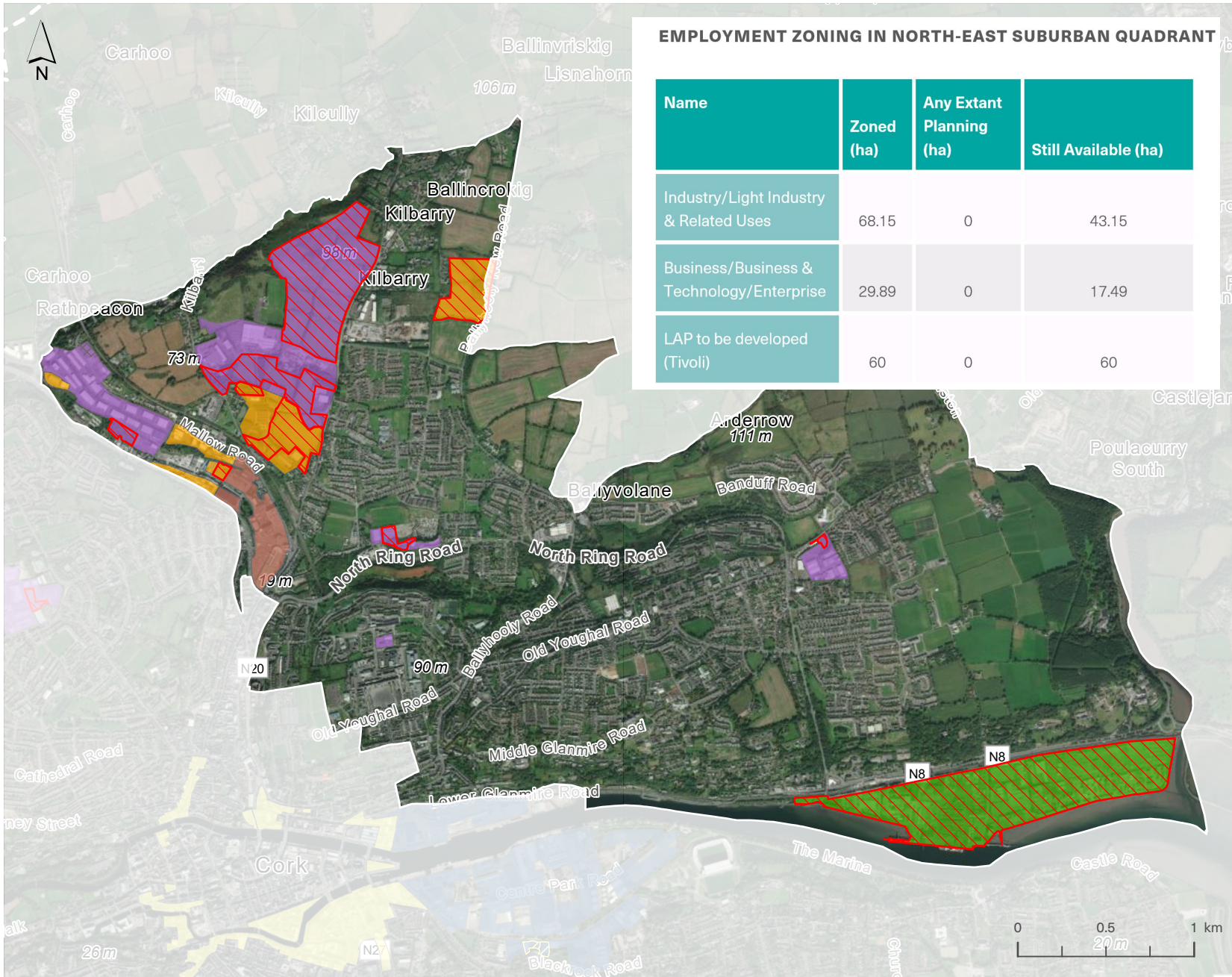


- City Boundary
- City Areas
- Active Planning Permission
- Employment Lands Not Developed
- Rezoned in Variation
- City Employment Zoning
- Business and Technology
- Light Industry and Related Uses

# NE QUADRANT

**EMPLOYMENT ZONING IN NORTH-EAST SUBURBAN QUADRANT**

Name	Zoned (ha)	Any Extant Planning (ha)	Still Available (ha)
Industry/Light Industry & Related Uses	68.15	0	43.15
Business/Business & Technology/Enterprise	29.89	0	17.49
LAP to be developed (Tivoli)	60	0	60



- City Boundary
- City Areas
- Active Planning Permission
- Employment Lands Not Developed
- Rezoned in Variation
- City Employment Zoning
  - Business and Technology
  - District Centres
  - Light Industry and Related Uses
  - Local Area Plan to be prepared
  - Mixed Use Development
- County Employment Zoning
  - Business
  - Industry

### 5.3.3 SOUTH-WEST QUADRANT

The South-West sub-area includes a mix of business and technology zonings as well as light industries and related uses. At 101 Ha, the Cork Science and Innovation Park (CSIP) is a special policy area identified for significant future job creation and economic output. There are two planning permissions on the site for a dental school and hospital, and 17,000 sq m of offices.

When the CSIP is omitted, the rate of zoned undeveloped employment land is low, confined chiefly to two pockets of light industry at Kinsale Road Roundabout and Togher Industrial Estate, and land zoned business and technology at the eastern end of the ESB Networks facility at Sarsfield Road.

Bishopstown and Ballincollig will have ready access to the CSIP area. The N40 Curaheen Interchange is located adjacent to the southern part of this site providing full access to the N22 and existing ring road to the city. Further west is the Poulavone Interchange which sits on a possible future Northern Ring Road linking to the M8 via Blarney and Glanmire. Foul sewer availability to develop this land bank is dependent on proposed upgrades to the existing network. Ballincollig has a current capacity of 30,400PE with a required future demand of 53,000PE. Potable water is provided to this area directly from Inniscarra Water Treatment Plant. Irish Water have ongoing plans to upgrade this plant in response to anticipated demand. The future development of the area will also benefit from the planned future CMATS light-rail system running east/west from Ovens to Mahon. A number of parts of the CSIP are subject to flood risk which requires further analysis in the context of future planning and development delivery.

### 5.3.4 SOUTH-EAST QUADRANT

All of the existing employment zoning in the South-East quadrant relates to 'business and technology' use. This is all focused in one large location at Mahon Industrial Estate and the adjoining lands to the east, north of Mahon shopping centre.

When you exclude lands with an active planning permission, there are approximately 8.5 Ha (17%) available for potential development.

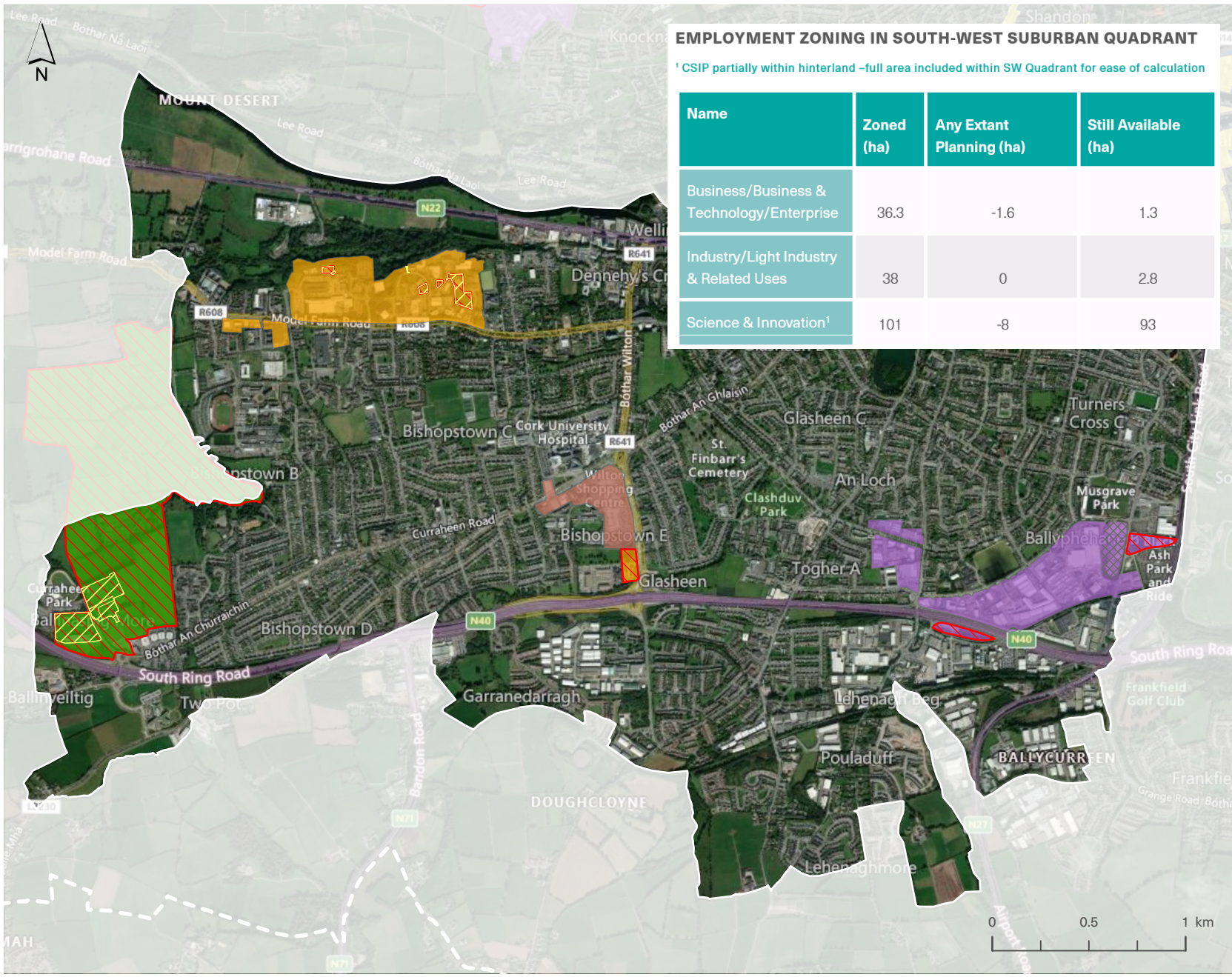
The area benefits from good connectivity to the N40 and the wider roads network. Recent upgrades to sustainable transport infrastructure and the development of additional residential lands in the immediate area implies that this area is well positioned for continued employment growth. The area is well serviced from a water, foul and storm sewer perspective and is not subject to flooding concerns as the storm outfall is directly to the estuary. Under CMATS proposals, existing employment areas are earmarked to benefit significantly from the planned public transport upgrades, including the light rail system between Ballincollig and Mahon.

# SW QUADRANT

## EMPLOYMENT ZONING IN SOUTH-WEST SUBURBAN QUADRANT

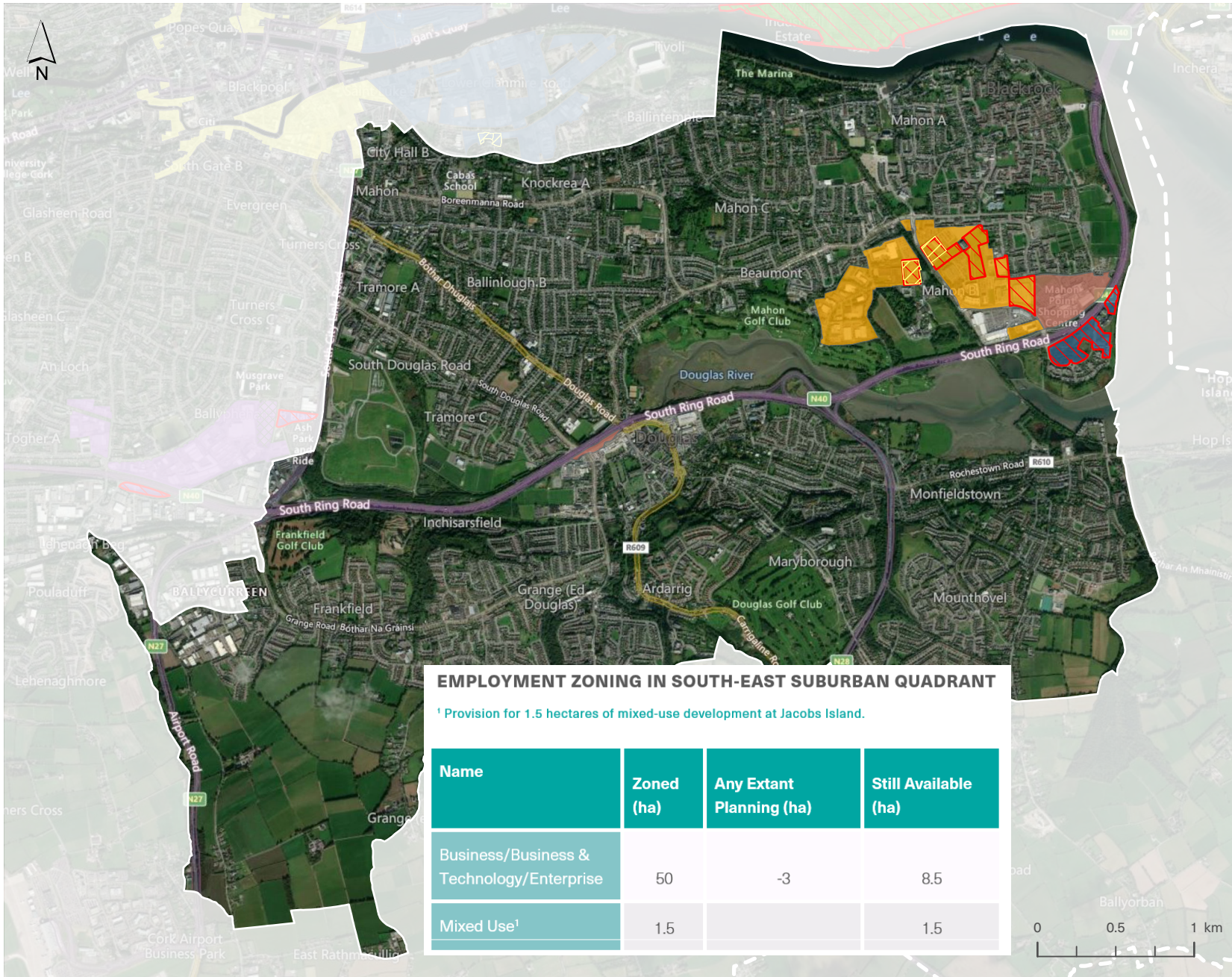
<sup>1</sup> CSIP partially within hinterland –full area included within SW Quadrant for ease of calculation

Name	Zoned (ha)	Any Extant Planning (ha)	Still Available (ha)
Business/Business & Technology/Enterprise	36.3	-1.6	1.3
Industry/Light Industry & Related Uses	38	0	2.8
Science & Innovation <sup>1</sup>	101	-8	93



- City Boundary
- City Areas
- Active Planning Permission
- Employment Lands Not Developed
- Rezoned in Variation
- City Employment Zoning
- Business and Technology
- District Centres
- Light Industry and Related Uses
- County Employment Zoning
- Special Policy Area

# SE QUADRANT



- City Boundary
- City Areas
- Active Planning Permission
- Employment Lands Not Developed
- Rezoned in Variation
- City Employment Zoning
  - Business and Technology
  - City Centre
  - Commercial Core Area
  - District Centres
  - Light Industry and Related Uses
  - Mixed Use Development

### **5.3.5 CITY HINTERLAND**

The City Hinterland sub-area includes 62.8 hectares of zoned land north of Apple at Hollyhill; a portion of the CSAIP; and employment lands at Cork Airport. Approximately 31.7 hectares of this is industry/light industry, of which 58% is currently available for development. 94% of the 31.15 hectare business and technology zoning component is also undeveloped.

Employment development at the Airport is currently limited by the capacity of the N27 Kinsale Road and its connection to the N40 at the Kinsale Road Roundabout. There is the potential for the Southern Distributor Road (SDR) as outlined in CMATS to provide an alternative link to the N71 to the west. Foul sewer and potable water provision are sufficient in this area and are set to improve as demand requires.

Key servicing considerations in respect of the CSIP area are summarised under the South-West sub-area.

### **5.3.6 URBAN TOWNS**

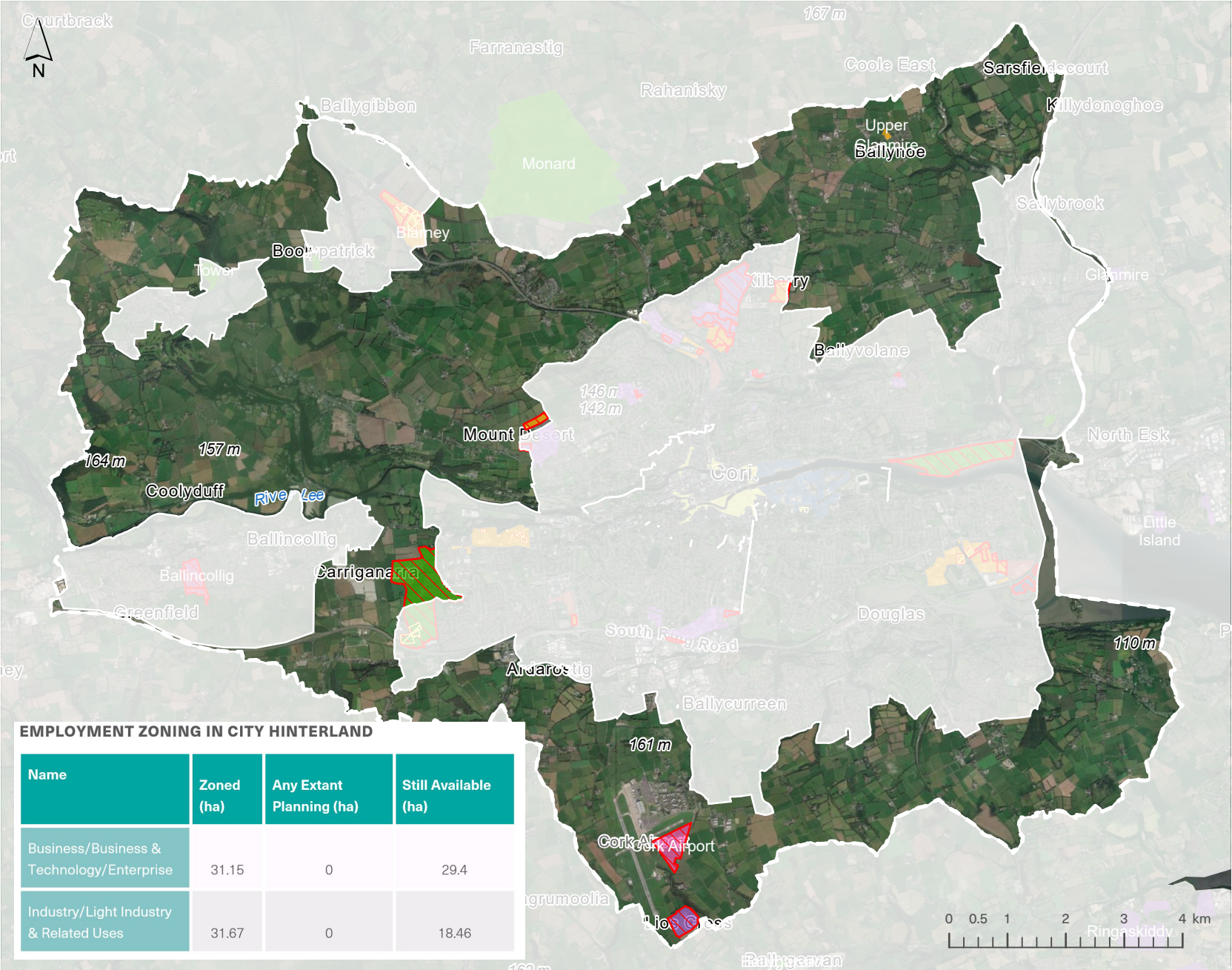
The urban towns, previously located in the County Council area include Ballincollig, Glanmire, Blarney and Tower and altogether comprise a population in the region of approximately 34,000 people, with Ballincollig being the largest of the urban areas.

There is a total of 51.6 hectares of zoned employment land in this sub-area with focused business and enterprise designations at Blarney and Ballincollig.

The undeveloped lands at Ballincollig are reasonably well connected to the main roads network via the Greenfield Interchange on the Ballincollig Bypass. Future link roads through the special development area to the south will provide additional connectivity as well as the possibility of a link to the east/west Light Rail. Foul sewer upgrades are required to develop these lands. A high level of storm attenuation is required in this area because of the flooding history on the Maglin River to the south.

The Blarney Business Park is directly connected to the N20 Cork/Limerick Road via a grade separated interchange and is currently being designed to motorway standard. This project will deliver a high-capacity road running adjacent to the Park. Sustainable transport solutions to serve the area are currently restricted to the existing bus service. Future cycle connections are proposed. Existing foul sewer provision is to the Blarney waste-water treatment plant which has a current capacity of 8,500PE, with significant investment needed to serve the wider area in the future.

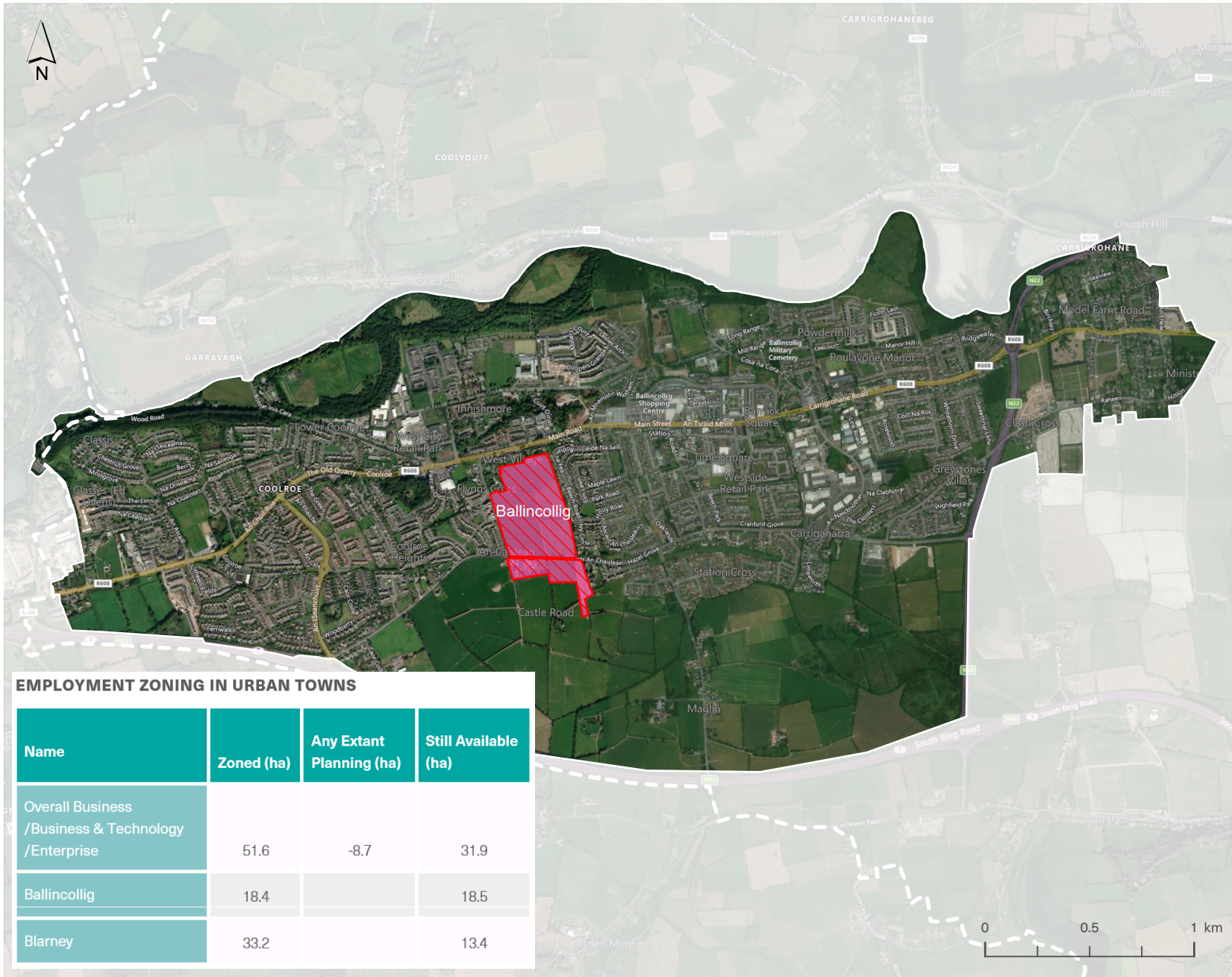
# HINTERLAND



**EMPLOYMENT ZONING IN CITY HINTERLAND**


Name	Zoned (ha)	Any Extant Planning (ha)	Still Available (ha)
Business/Business & Technology/Enterprise	31.15	0	29.4
Industry/Light Industry & Related Uses	31.67	0	18.46

# BALLINCOLLIG



## EMPLOYMENT ZONING IN URBAN TOWNS

Name	Zoned (ha)	Any Extant Planning (ha)	Still Available (ha)
Overall Business /Business & Technology /Enterprise	51.6	-8.7	31.9
Ballincollig	18.4		18.5
Blarney	33.2		13.4

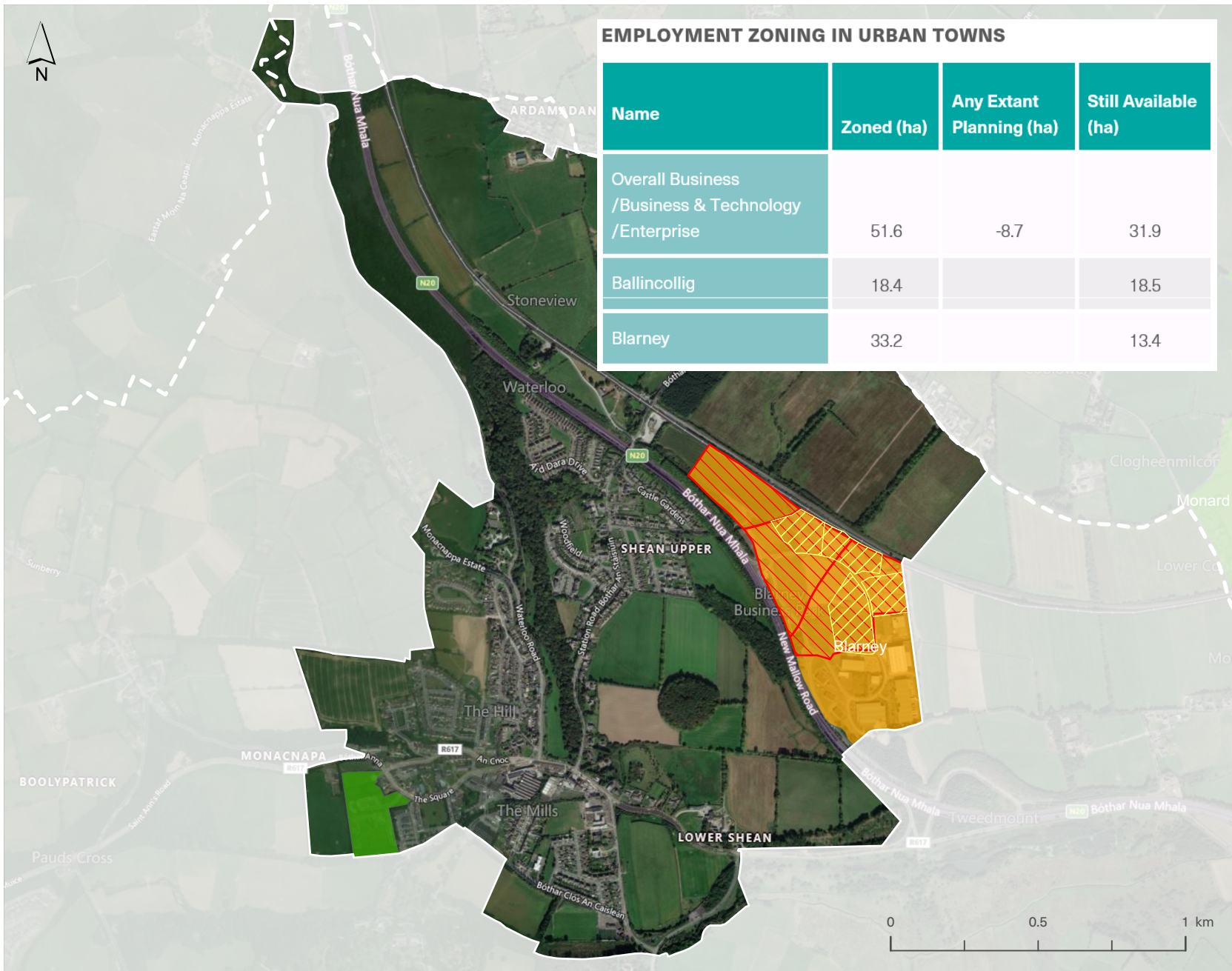
- City Boundary
- City Areas
-  Active Planning Permission
-  Employment Lands Not Developed
-  Rezoned in Variation
- County Employment Zoning
-  Enterprise



# BLARNEY

## EMPLOYMENT ZONING IN URBAN TOWNS

Name	Zoned (ha)	Any Extant Planning (ha)	Still Available (ha)
Overall Business /Business & Technology /Enterprise	51.6	-8.7	31.9
Ballincollig	18.4		18.5
Blarney	33.2		13.4



- City Boundary
- City Areas
- Active Planning Permission
- Employment Lands Not Developed
- Rezoned in Variation
- County Employment Zoning
- Business
- Special Policy Area

### **5.3.7 CITY CENTRE**

The City Centre area encompasses the central island, the North and South Docklands areas and the immediate inner city suburbs to the north and south of the city including Shandon, portions of St. Luke's and South Parish. The focus of employment in this area is within the Central Business District or heart of the City. The greatest potential for future strategic employment growth is contained within the South Docklands, and to lesser extent North Docklands, areas equivalent in size to the existing City Centre.

The zoning split in the City Centre is 43.4 hectares commercial core and 69 hectares of mixed-use. There are 108 extant planning permissions in the defined City Centre area comprising a mix of retail, leisure, residential and commercial office uses. The regeneration process on the north and south quays has intensified in recent years with over 82,000 sq m of office floor space completed or under construction, with a further 12,000 sq m in the planning process.

The docklands are also currently home to a large number of traditional, including some heavy industries, as well as a large number of small-to-medium sized light industrial businesses related to construction, motor, furniture and other uses.

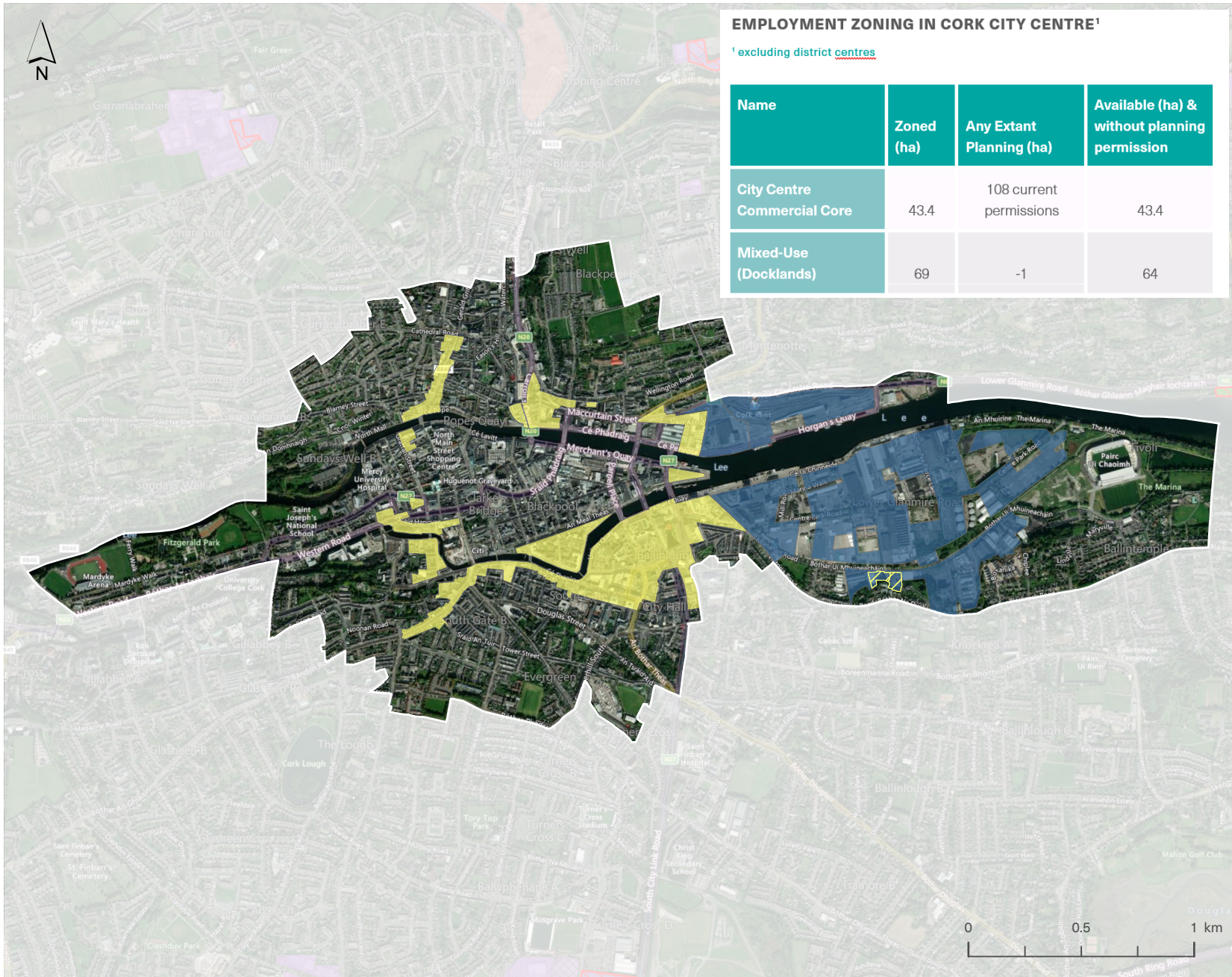
A number of areas of current zoned lands are subject to both fluvial and coastal flooding with implications for new developments in terms of finished floor levels, underground parking etc. Flood protection measures for the City Centre are under consideration. Foul sewer capacity within the City Centre is limited only by the capacity of the Carrigrenan Waste-Water Treatment Plant which has adequate physical capacity to cater for continued growth in population numbers served. Potable water provision within the City Centre is adequate to cater for significant levels of development. Future proposed Irish Water upgrades to water treatment plants will ensure security of supply is achieved.






# CITY CENTRE

## EMPLOYMENT ZONING IN CORK CITY CENTRE<sup>1</sup>

<sup>1</sup>excluding district centres

Name	Zoned (ha)	Any Extant Planning (ha)	Available (ha) & without planning permission
City Centre Commercial Core	43.4	108 current permissions	43.4
Mixed-Use (Docklands)	69	-1	64



- City Boundary
- City Areas
-  Active Planning Permission
-  Employment Lands Not Developed
-  Rezoned in Variation
- City Employment Zoning
- City Centre
-  Commercial Core Area
-  Mixed Use Development

## 5.4 Available Zoned Land

The table below summarises the existing amount of zoned and available<sup>9</sup> employment development land in Cork City. A total of 650.6 hectares of zoned employment land exists having regard the contents of the Cork City Development Plan 2015 and governing Cork County Municipal District Local Area Plans<sup>10</sup>. This figure comprises 473.8 hectares of land zoned 'business'<sup>11</sup> and 176.8 hectares zoned 'industry'. 74% of the business component remains theoretically available for development, with 38% of the industry zoning undeveloped and available.

Zoning	Total Zoned Land (Ha)	Available Zoned Land (Ha)
Business	473.8	350.6
Industry	176.8	67.3
Total	650.6	417.9

Figure 5.4 Summary of zoned and undeveloped employment land in Cork City

Based on the completed sub-area analysis, it is notable that 63% (264.4 hectares) of the zoned and undeveloped lands relate to five large strategic land banks only. This is very significant in the context of the forthcoming Development Plan. Where current levels of employment zonings are retained, the delivery of the future employment strategy will be heavily contingent on their development.

Employment Area	Hectares Zoned	Undeveloped / Without Planning Permission (Ha)
Tivoli	60	60
Cork Science & Innovation Park	101	93
Kilbarry	97	52
Ballincollig	18.4	18.4
Cork Airport	41	41
Total	317.4	264.4

Figure 5.5 Summary of zoned and undeveloped lands on identified strategic land banks

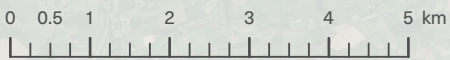
<sup>9</sup> Land which has not been developed and which does not have an extant planning permission.

<sup>10</sup> As it relates to land previously in the administrative area of Cork County Council and now in the administrative area of Cork City Council.

<sup>11</sup> Business includes business/ technology/ enterprise/ science and innovation, mixed use and City Centre commercial core.



Principal Areas with Residual Employment Zoned Land	Hectares (Ha) Zoned	Ha Remaining Undeveloped & Without Permission
Tivoli	60	60
Cork Science & Innovation Park	101	93
Kilbarry	97	52
Ballincollig	18.4	18.4
Cork Airport	41	41
<b>Total</b>	<b>317.4</b>	<b>264.4</b>



**City Boundary**  
 City Areas  
 Employment Lands  
 Not Developed & Without Planning Permission  
 City DP Employment Zoning  
 Business and Technology

**City Centre**  
 Commercial Core Area  
 District Centres  
 Light Industry and Related Uses  
 Local Area Plan to be prepared  
 Mixed Use Development

**County DP Employment Zoning**  
 Business  
 Enterprise  
 Industry  
 Special Policy Area  
 Principal Areas with Residual Zoned Lands

# 06. Baseline Review

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This chapter brings together the findings of the preceding chapters 2-5 to characterise the existing employment position in Cork City and identify key matters to be considered as part of the development of a new employment strategy.

## 6.1 Steering Group Discussions

In December 2020, the completed baseline material was presented to the project steering group as a basis to identify gaps in current employment provision, pinpoint future opportunities and inform direction on the establishment of future strategic employment objectives.

The key discussion points and conclusions drawn are summarized as follows:

1. There are clear policy aspirations to significantly grow employment provision in Cork City in support of its objective to become a city of international scale. This necessitates real ambition in terms of the development of an employment strategy where the emphasis should be on the delivery of tangibles which create the conditions to attract investment in jobs growth.
2. Both the NPF and RSES have identified significant scope for redefinition of traditional employment locations in Cork, particularly where locational advantages lend themselves to increased employment density and expansion of the emerging knowledge based sectors in the economy.
3. Improved integration of land use, transportation and other support infrastructure servicing is central to maximising employment opportunity in Cork City. A clear delivery focus on these interrelationships will greatly improve the city's value proposition.
4. Quality of life is a key component part of location decision-making for FDI companies. When compared with Dublin, Cork City has some advantages in this area with respect to cost of living and reduced commute times, as well as lower comparable office rental costs for employers. A sustained policy focus on placemaking, well-being, and quality of employment is critical.
5. An emphasis should be placed on developing sectors related to the knowledge economy, including R&D, life sciences, clean tech and environmental, ICT and shared services jobs. While Cork City has some key sector ingredients, it is considered that it has significant untapped potential in respect of health, education and associated industry. The establishment of locational clusters and the development of synergies is crucial to this.
6. A review of socio-economic datasets confirms variable levels of performance across different sub areas of the city in relation to key employment metrics. There is a clear

juxtaposition between high job numbers and high unemployment rates in some specific areas where available jobs may not cater for the skillsets of the local demographic. Elsewhere, there are clear patterns of daily cross-commuting for work taking place in the city confirming that a lot of people do not work in the area in which they live. Within this, this has been a spatial imbalance in jobs growth in recent years with the development of new employment largely taking place in the south of the city.

7. Cork City has approximately 90% of the total office market in Cork. 44% of stock is located in the city centre, with the quantum of floorspace in the Southeast suburbs (19.8%) and City Hinterland (15.3%) also notable. The delivery of new 'grade A' offices in the City Centre over the last five years is highly promising contributing to the creation of a new international identity for Cork. It is vital that the forthcoming Development Plan builds on this to deliver a world-class urban centre. A concern in respect of this is the lack of new housing stock that has been delivered in the city over the last 10 years. The delivery of new homes is an important necessity for continued employment growth and investment, and the achievement of vibrant live/work communities.
8. While the planned redevelopment of the docklands in Cork City is a major opportunity, the ultimate achievement of this will necessitate the relocation of some long established and more traditional employers. It is estimated that there are approximately 4,000 existing jobs in the docklands which may be 'decanted' to other areas. It is important that the emerging employment strategy makes appropriate provision for this and the retention of such jobs, where possible, within Cork City.
9. Based on a review of market enquires there are very encouraging trends related to the expansion of recent business startups which is driving demand for new office floorspace. This should be nurtured in policy terms. The emergence of 'grey space', office accommodation is a notable new feature of the market. This is space which is currently under lease, but which is available to the market via sub-lease or assignment.
10. There is a notable shortage of available industrial / manufacturing / warehouse stock in Cork City at present and this is hampering market activity. Based on CSO census 2016 data, 21% of the resident population in the city is employed in the manufacturing sector, but only 11% of jobs within the city boundary relate to this category. There is an opportunity to grow the employment coefficient in this area, but it requires focused interventions.
11. Image marketing and branding of employment locations plays a critical role in realizing employment investment objectives. The recent success of Blarney Business Park is a testament to this and the importance of clearly defined strategies for site development, promotion and tenant delivery.
12. A sizable proportion of existing zoned employment land has not yet come forward for development. In particular, there are five strategic land banks on which 264 hectares are available. The future role and quantum of zoned employment land in these areas needs to be reviewed. Policy impetus may be required in some areas to enable the delivery of economic development.

## 6.2 SCOT Analysis

The table below provides an analysis of the Strengths, Constraints, Opportunities and Threats [SCOT] facing Cork. This draws upon the analysis in this section to consider the main implications for strategic employment land in the City.

Current Strengths	Current Constraints
<ul style="list-style-type: none"> <li>▪ Cork is an attractive employment location based on quality of life indicators.</li> <li>▪ Highest number of foreign owned firms per capita in Ireland.</li> <li>▪ High levels of entrepreneurial activity reflected in the number and success of new business start-ups.</li> <li>▪ High net productivity output per worker compared to other parts of Ireland.</li> <li>▪ Strong skills base with over 36,000 enrolled in third level institutions.</li> <li>▪ Lower average employee commute times to place of work compared with Dublin.</li> <li>▪ Competitive office rental costs are attractive to businesses.</li> <li>▪ Strong employment growth in 'technical, scientific and technical activities' and 'information and communication' jobs in the last intercensal period.</li> <li>▪ Diverse population with 43% in City Centre born outside Ireland.</li> </ul>	<ul style="list-style-type: none"> <li>▪ High rates of daily cross-city employment-based traffic movements as people live and work in different locations.</li> <li>▪ Commuter public transport within the city limited to bus with relatively low uptake in use, particularly in the newly incorporated City areas.</li> <li>▪ Muted levels of housing delivery in Cork City Centre to support employment growth.</li> <li>▪ Geographical imbalance in recent jobs focused south of the River.</li> <li>▪ Hotspots in unemployment / disadvantage in and adjacent to some key employment locations (e.g. Mahon and Hollyhill).</li> <li>▪ Variable quality of current office and manufacturing stock.</li> <li>▪ Perceived inflexibility of current approach to employment land use policy in some areas.</li> </ul>
Current Opportunities	Current Threats
<ul style="list-style-type: none"> <li>▪ Notable office delivery in City Centre in the last 18 months, a platform for further business and identity development.</li> <li>▪ Potential to develop knowledge economy, life sciences and</li> </ul>	<ul style="list-style-type: none"> <li>▪ Possible delays to delivery of key infrastructural projects as outlined in CMATS</li> <li>▪ Competition from other urban centres and adjoining areas, which may have a</li> </ul>



health/medical technologies sectors based on critical mass of existing education and health expertise.

- Opportunities to increase employment in the areas of finance, insurance and real estate activities.
- Greater connectivity and public transport options arising from CMATS improving accessibility and attractiveness of employment areas.
- Improved strategic accessibility arising from N/M20, M28, Dunkettle Interchange and N25 road improvements fostering better inter-regional employment growth synergies.
- Investments in place-making and neighbourhood creation fostering attractiveness, inward investment and greater self-sufficiency in areas.

better offer in terms of zoned/serviced employment land.

- Decanting of traditional industry/employment from regeneration and loss of associated employment.
- Continued imbalance in distribution of jobs across Cork City.
- Topographical or other physical challenges that may inhibit employment opportunities in some areas.
- Need to better align employment prospects with areas of disadvantage to avoid creation of two-tier society in some areas.
- A lack of alignment in terms of policy agendas and strategic direction.

Figure 6.1 SCOT Analysis

# 07. Future Employment Land Requirements

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This chapter identifies future employment land requirements for Cork City. It begins with an assessment of market demand and supply. It then establishes a projection for future office and manufacturing space based on applied assumptions.

## 7.1 Market Demand and Supply Assessment

As mentioned earlier Covid-19 had a significant impact on the transactional markets in 2020. While the rate of office transactions slowed there is still good demand within the sector as companies have weathered the initial shock brought by the pandemic. There is increased vacancy in the office market due to the delivery of new grade A stock and availability of Grey Space, i.e. space which is available via sublease or assignment.

As an asset class Industrial/ Manufacturing/Warehousing has held strong during the current pandemic and Nationally and Internationally has been viewed as a safe investment by institutional investors. Industrial property plays a key role in manufacturing, logistics and supply chain. Demand in the Cork market at present is driven by companies operating in the warehousing/ distribution logistics, pharma and manufacturing sectors.

### 7.1.1 OFFICE ENQUIRES

Over the last 12 months Savills have recorded office requirements in Cork of approximately 60,000 sq m from a variety of companies. These space requirements vary significantly in size from just 100 sqm to 20,000 sq m spread across City Centre and suburban locations. While many office enquiries are for space in the 500-2,000 sq m category a handful of key large enquiries can have a significant impact on availability levels in the market.

While some enquiries recorded over the last 12 months were paused due to Covid-19, many have returned to the market with reduced size requirements and are actively engaging in order to secure office space. The Finance, Professional services and IT sectors have driven demand for office space in recent times particularly for the new Grade A stock.

Demand for office space tends to be centred in the City Centre and the South Suburbs both east and west. These areas are recognised office districts with availability of quality stock and an established occupier base. In a suburban context, the Southern suburbs of the City tend to be the key areas of office demand.

### 7.1.2 INDUSTRIAL ENQUIRES

Across 2020 we have recorded Industrial/ Manufacturing space requirements seeking up to 50,000 sq m of industrial space. These enquiries ranged from small warehouse/ trade

warehouses of sub 500 sq m from indigenous SME's to 5,500 sq m from large multi-national logistics and manufacturing operators. Demand from last mile logistics operators has been particularly high in recent times due to the growth in demand for their services from online retail due to travel limits and closures of non-essential retail during periods of heightened restrictions.

As previously mentioned, supply of stock to service these market requirements is incredibly low with Blarney Business Park the only location within the City Council jurisdiction offering availability of Grade A accommodation of scale. There is demand within the market to identify new locations with strong infrastructure to build high quality Industrial/ Warehousing/Manufacturing space.

### 7.1.3 OFFICE PIPELINE

2020 was a strong year for the delivery of new office stock to the market with 45,000 sq m delivered predominately in the City Centre. Looking forward we anticipate just 5,000 sqm being delivered to the market in 2021 as the Counting House development is brought to practical completion.

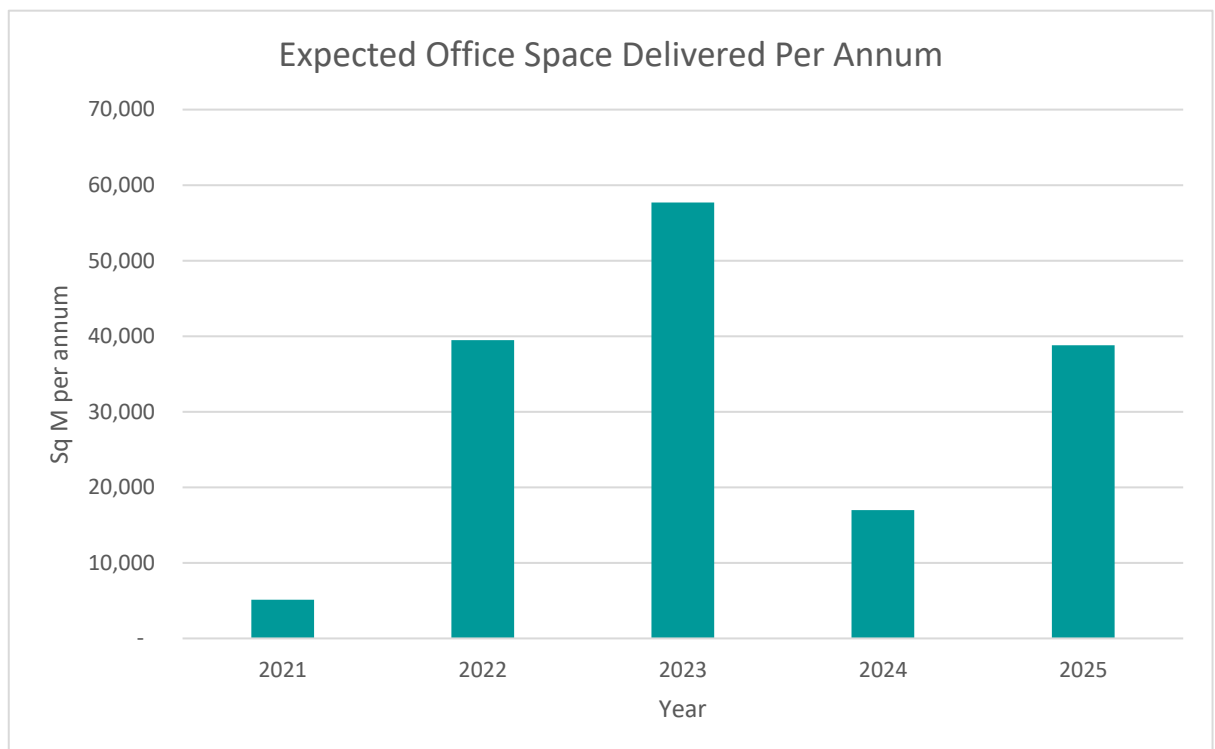


Figure 7.1 Projected Office Floorspace Delivery 2021-2025, Source: Savills Research Q4 2020

Our development pipeline as illustrated above although speculative from 2022 to 2025 is based upon market intelligence. With construction timelines running at approximately 18 months the market will have a better sense of what level of stock will be delivered in 2022 as we move through 2021 and current new standing stock is absorbed.

In relation to the geographic spread of new office development in the pipeline, the majority of which is City Centre focused. In relation to suburban office developments the key schemes in the pipeline are the remaining phases of Westfield Office Quarter in Ballincollig

and the City Gate Plaza development in Mahon. It is also worth noting the possibility of further office development in Cork Airport Business Park on remaining vacant sites.

### 7.1.4 INDUSTRIAL PIPELINE

The nature of Industrial/ Warehousing/Manufacturing uses means much of the stock is situated outside the City Centre Area. At present the total anticipated pipeline of Industrial stock over the next 5 years remains relatively low at just 57,000 sq m. This is illustrated below which includes planned developments in Little Island and Watergrasshill.

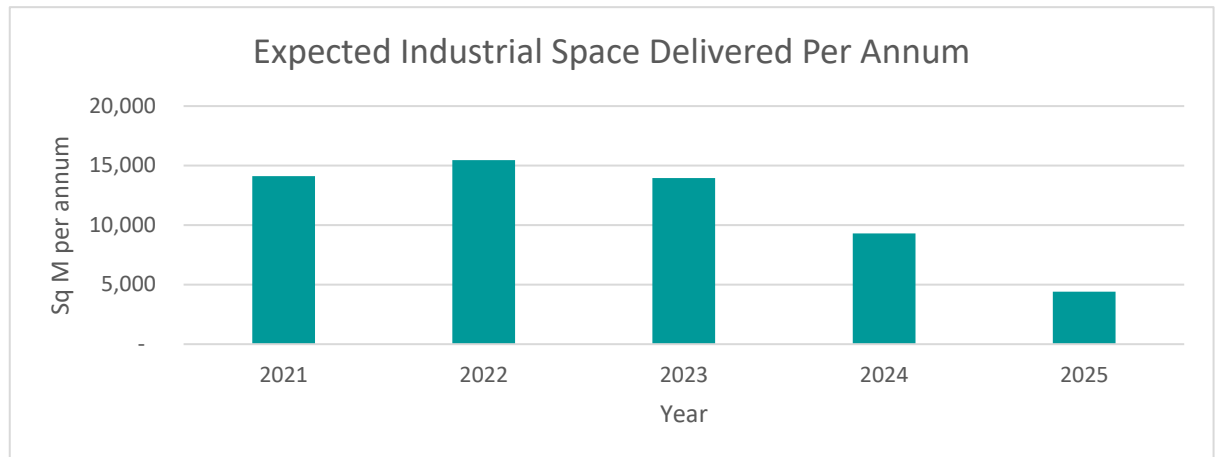


Figure 7.2 Projected Office Floorspace Delivery 2021-2025, Source: Savills Research Q4 2020

When just the City Council jurisdiction is considered effectively Blarney Business Park is the only location with new supply. To date approximately 17,500 sq m have been delivered in this location with a further 18,500 sq m anticipated to be constructed before the end of 2023. Blarney Business Park has seen rapid development since the undeveloped lands were acquired by JCD Group. The Business Park has been rebranded and is now maintained to the highest of standards and has attracted global logistics operators and high-end manufacturing uses.

Given the limited supply of industrial stock in the pipeline there is certainly market demand for new locations to be identified suitable for industrial, manufacturing and life science uses. Blarney Business Park is an example of a location which has completely changed its market perception due to rebranding, developer led investment and master planning and construction of 'best in class' buildings appropriate to meet market occupier demand.

## 7.2 Employment Forecasting

This section projects the future demand for office and manufacturing space in Cork City over the period to 2028 and beyond.

### 7.2.1 METHODOLOGY

The establishment of future employment space requirements in Cork City is based on both quantitative and qualitative assessments, including a review of historical development trends presented in preceding chapters, economic and market conditions, as well as consultation with the project steering group. This has culminated in the presentation of some different employment scenarios which reflect potential growth considerations and the policy aspirations in the forthcoming Cork City Development Plan 2022-2028. The

methodological approach includes many variables and should be treated as a guide rather than an absolute requirement.

**Approach**

1. Establishment of jobs growth target for Cork City.
2. Disaggregation of jobs growth by employment sectors.
3. Translation of job numbers into employment space requirements through use of employment densities.
4. Application of plot ratios by use class to determine land requirements.
5. Identification of a preferred scenario.

**7.2.2 JOBS GROWTH TARGET**

The population growth targets as contained in the Draft Cork City Development Plan 2022-2028 are outlined below.

Population Target	2016	2022	2028	2031
Cork City	210,853	234,370	257,887	286,178

Figure 7.3 Population Growth Projections 2016-2031

This equates to an additional 47,034 persons by 2028, an average of 3,919 persons per annum over a 12-year period.

In establishing an employment projection, the National Planning Framework applies a mid-year scenario population to employment ratio of 1.6 people per job. The methodology below is based on job per people rather than the people per job ratio used in the NPF. Figure 7.4 presents three job ratio options that were reviewed, providing for an additional jobs growth range of between 28,200 – 34,334 jobs. Alongside the 0.6 and 0.73 ratios, another option reflecting the average between both was also developed. Option 2 was ultimately selected for the purposes of projection on the basis that it strikes a balance between capturing local circumstances and national trends. The resulting jobs growth target is 31,042 jobs to 2028.

Population Growth (To 2028)	Jobs Ratio Option 1	Jobs Ratio Option 2	Jobs Ratio Option 3
47,034	0.6	0.66	0.73

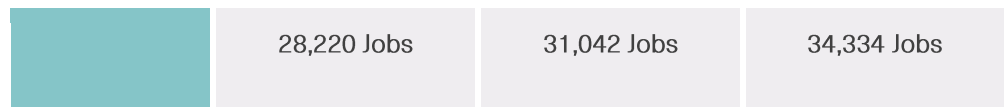


Figure 7.4 Jobs Growth Options

### 7.2.3 DISAGGREGATION OF JOBS GROWTH BY EMPLOYMENT SECTORS

The disaggregation of the jobs growth targets by employment sectors has been informed by a number of key considerations:

- The challenge of modelling future employment growth by sector is well recognised in Ireland. There is not an agreed approach to this due a lack of appropriate macroeconomic time series data.
- The ESRI COSMO model used to forecast growth in the National Planning Framework grouped employment into three broad sectors, namely 'traded' (if at least 50 per cent of total final uses are exported), 'government' (sectors in which at least 50 per cent of total final uses are used by the government as consumption and 'non-traded' (all remaining sectors). The methodology models these sectors differently due to the non-availability of comparable datasets and urges caution in terms of local use.
- The preceding chapters of the study reviewed different categories of employment in Cork City. A review of baseline information and stakeholder engagement identified opportunities to grow employment coefficients in the areas of knowledge economy, life sciences and health/medical technologies. These are priority focus areas in terms of attracting inward investment.
- National and regional policy identify Cork as a key driver of economic growth in the southwest, with an ambitious growth target to enhance its potential to become an international city of scale. This ambition should be nurtured in the employment forecast.
- Cork has the highest number of foreign owned firms per capita in Ireland. As noted in the ESRI evidence-based document for the NPF 'Prospects for Irish Regions and Counties', multinationals have a positive impact on enterprise entry in manufacturing and enterprise survival meaning that existing location patterns reinforce the overall spatial pattern of development. Cork has competitive advantage in this area which should be maximised.
- A review of key component parts of existing jobs in Cork City confirms that office-based sectors including information and communications, education, social work and other service activities comprise approximately 56% of employment. For reference, manufacturing provided for 11% of jobs in 2016, with wholesale and retail trade accounting for 23%.
- Historic trends in employment change are also a useful barometer. A review of resident labour force change between 2011-2016 confirms a 51% increase in employment in 'professional, scientific and technical activities', with sizable gains of 57% also registered across 'information and communication' job categories. Alongside this, there was a 21% increase in people employed in 'manufacturing'. It is

envisaged that these categories will continue to drive employment growth over the next 10 years.

- Cork has a lower proportion of financial, insurance and real estate activities jobs than other cities of scale which could be another target growth area. The demand for office floorspace is also likely to increase as a direct and natural product of population growth whereby demand will increase for government-based as well as other administrative services.
- The process of regeneration and renewal in parts of Cork City including the docklands will hasten the relocation of older or historically established industries to other areas. The forecast should appropriately cater for the retention of such employment within Cork City.

This has culminated in the development of 3 split scenarios.

#### ***Split Scenario 1: National Distribution of Jobs***

A review of CSO Census of population data indicates that on average 50% of jobs in the State relate to services, education and health, public sector, and construction employment types. This scenario assumes that 50% of future jobs in Cork City will be retained in these categories. It disaggregates the remaining 50% to 'office-based industries' and 'manufacturing' by means of a 3:1 ratio split based upon the national trend.

#### ***Split Scenario 2: Cork City Jobs Distribution, Less Retail***

A review of CSO employment sectors based on workplace zones in Cork City confirms that 23% of jobs in the defined city are within the 'wholesale and retail trade' category. This scenario assumes the percentage of jobs in this category will be maintained commensurate with overall jobs growth and that such jobs will be provided for generally within designated retail areas. As this study is focused on future employment in office and manufacturing, it discounts this category from future jobs growth figures. It disaggregates the remaining jobs across office-based industries and manufacturing by means of a 3:1 ratio split.

#### ***Split Scenario 3: Cork City Jobs Distribution, With Manufacturing Growth***

The CSO workplace zones data indicates that there were 12,148 jobs in 'manufacturing' in Cork City in 2016 (11.2% of total jobs). A review of resident labour force change confirms 21% growth in jobs in this category over the last intercensal period. It is recognised that the CSO categorisation may not capture the full extent of persons actually employed in manufacturing subsectors in light industry such as life sciences, clean technologies and advanced engineering which can often be redirected to research and health-related job categories. It is also recognised that many research-based enterprises combine offices space with supporting manufacturing space, including laboratories. Given the aspirations to grow jobs coefficients in life sciences, it is considered prudent to include a split which appropriately captures these intentions. This scenario adopts the Cork City less retail distribution in split scenario 2 and assumes equitable growth in manufacturing jobs over the period to 2028 through the application of a 50:50 ratio split between office-based jobs and manufacturing.

Job Growth	Sector Scenario	Disaggregated Jobs
Jobs Ratio: 31,042 Jobs	Split Scenario 1  <i>[National Jobs Distribution: 50% of future jobs in Office/Manufacturing with 75:25 ratio split]</i>	15,521 Jobs  Office: 11,641  Manufacturing: 3,880
	Split Scenario 2  <i>[Cork Jobs Distribution, Less Retail: 77% of jobs in Office/Manufacturing with 75:25 ratio split]</i>	23,902 Jobs  Office: 17,927  Manufacturing: 5,976
	Split Scenario 3  <i>[Cork Jobs Distribution, Less Retail, with Manufacturing Growth: 50:50 ratio split]</i>	23,902 Jobs  Office: 11,951  Manufacturing: 11,951

**Figure 7.5 Sector Split Scenarios**

As part of discussions with the project steering group, it was agreed that the manufacturing category be subdivided into light industry and logistics on the basis of an approximate 70:30 disaggregation as part of future employment forecasting whilst recognising there is an overlap between light industry zoned lands and logistics that needs to be recognized as part of the economic strategy. It is recognised that storage and distribution plays a very important supplementary employment role in Cork City related to the packing, storing and movement of manufactured items. As outlined in Chapter 7, demand for logistics floorspace has increase exponentially in recent times.

It has been quantified as part of this study that approximately 4,000 jobs will ultimately be decanted to other areas to facilitate the regeneration of the north and south docks in Cork City. It is critical that future zoned land provides for this so that these jobs are retained in Cork City and new employment lands and facilities are delivered ahead of operators decanting from regeneration areas. As such, these jobs have been added to the manufacturing category for the three split scenarios presented in the modelled forecast in Figure 7.8.

#### **7.2.4 APPLICATION OF EMPLOYMENT DENSITIES**

The proposed density figures have been derived from a literature review of UK-based research and policy guidelines for comparable urban areas; analysis of empirical data including sample local projects in Cork City; and peer review by Savills from a commercial market perspective.



In relation to office space, a review of completed developments in Cork City Centre confirms an average square metres per job density figure of 18. This has been adopted as an appropriate benchmark for this use type.

It is evident that there is a wide degree of variation in densities for manufacturing uses across Cork, both industry and light industry. The extreme ends of the distributions are likely to be driven by operator specific factors in some cases. The UK Homes and Communities Agency (HCA) Employment Density Guide 2015 identifies that the R&D sector is a dynamic and broad sector comprising general innovation, engineering and science-focused enterprise as well as more traditional industry and factories. Their research identifies a range of between 40-60 sqm per worker. This tallies broadly with practical examples reviewed in Cork City. A mid-point of 50 sqm per worker has been adopted.

As part of this analysis, and on the basis of an identified need to cater for growth in logistics, storage and distribution space in the coming years, it was considered necessary to establish a density rate for this category distinct from light industry. The HCA guidelines identify an average of 80 sqm per worker across different storage and distribution types and this has been applied.

Category	Sample Sectors	Density (sqm)
Office	Corporate, professional services, public sector, finance and insurance	18
<b>Manufacturing</b>		
Light Industry	R&D, laboratories, specialist engineering	50
Logistics	Factories and warehousing	80

Figure 7.6 Applied Density Figures

### 7.2.5 PLOT RATIOS

Plot ratio figures were also been derived from a literature review of UK-based research and an analysis of practical examples in Cork City. They have also been subject to peer review by Savills from a commercial market perspective. A review of recent office completions in Cork City Centre indicates trends towards higher plot ratios for office at One Albert Quay, Navigation Square and Penrose Dock. The plot ratio numbers are lower once you leave the

City Centre and Savills have advised that a ratio of 20,000 sq m per hectare should be considered as city-wide benchmark<sup>12</sup>.

As expected, there are also variances across different types of manufacturing uses. There has been a deliberate intention to capture tech and life-science ratios in Cork as part of this review which included a figure of 3,700 sq m per hectare for med-tech, a ratio of 4,000 sq m per hectare for precision engineering and a reduced ratio of 2,700 sq m per hectare for laboratory testing. Separately, plot ratios are lower for recent logistics enterprises at locations such as Blarney Business Park. As identified in the table below, plot ratio figures of 3,000 and 2,500 sqm per hectare have been adopted for light industry and logistics categories reflecting completed analysis.

Category	Plot Ratio (sqm per hectare)
Office	20,000
<b>Manufacturing</b>	
Light Industry	3,000
Logistics / Distribution	2,500

Figure 7.7 Applied Plot Ratio Figures

### 7.2.6 FLOORSPACE AND LAND REQUIREMENTS

The table below presents the outputs of the final forecast for the three scenarios. It confirms a range of floorspace and resulting land requirements reflecting the different modelled inputs. For example, the land requirements for office fluctuates between 10.48 and 16.13 hectares across the three scenarios, the largest of which is scenario 2 where 17,927 jobs are assigned to this category. The overall floorspace and land requirement is highest under scenario 3 which provides for equitable growth in manufacturing jobs relative to office over the period to 2028.

Job Category	Job No.	Density	Floorspace Requirement	Plot Ratio	Land Requirement (Ha)
Split Scenario 1: 19,521 Jobs (15,521 job forecast plus 4,000 decanted jobs in manufacturing category)					

<sup>12</sup> These ratios are indicative and will vary across the City depending on local character/site specific considerations etc. e.g. densities in the City Centre are considerably higher than Hollyhill and other locations where landscaping/supporting infrastructure account for more land-take.

Office	11,641	18	209,533	20,000	10.48
Manufacturing	7,880	-	-	-	
Light Industry	5,516	50	275,800	3,000	91.93
Logistics	2,364	80	189,120	2,500	75.65
<b>Total</b>			674,453	-	178.06

**Split Scenario 2: 27,902 jobs (23,902 job forecast plus 4,000 decanted jobs in manufacturing category)**

Office	17,926	18	322,681	20,000	16.13
Manufacturing	9,976	-		-	
Light Industry	6,983	50	349,160	3,000	116.39
Logistics	2,993	80	239,424	2,500	95.77
<b>Total</b>			911,265	-	228.29

**Split Scenario 3: 27,902 jobs (23,902 job forecast plus 4,000 decanted jobs in manufacturing category)**

Office	11,951	18	215,121	20,000	10.76
Manufacturing	15,951	-		-	
Light Industry	11,166	50	558,285	3,000	186.10
Logistics	4,785	80	382,824	2,500	153.13
<b>Total</b>			1,156,230	-	349.98

**Figure 7.8** Modelled Floorspace and Land Requirements

### **7.2.7 PREFERRED SCENARIO**

Based on a review of the completed analysis, it is recommended that Split Scenario 2 be advanced as the preferred future forecast option. It represents the mid-scenario based on reasoned assumptions related to the disaggregation of future jobs and subsequent floorspace and land requirements. Within this, it is recognised that where the planning system provides exactly enough land to meet the calculated requirement, it is almost certain that land supply in practice would fall short of demand, and hence development and employment growth would fall short of the envisaged target.

# 08. Future Supply and Development Locations

This chapter sets out future site requirements and identifies potential development supply locations to support employment growth over the life of the forthcoming Development Plan.

## 8.1 Definition of Future Requirements

It is critical that the right type of employment sites are available to the market. A key part of the assigned project brief included the identification of what types of employment sites are needed in Cork, and secondly, what attributes do such sites need to be attractive and successful. A clear understanding of this is an important precursor to the identification of suitable locations for future employment growth and any subsequent decisions taken on the zoning of such lands.

To appropriately inform the approach, a specification was developed for key employment growth sectors, as well as employment relocation sectors in Cork City, the findings of which are summarised below.

Potential Growth Sector	Sector Requirements	Indicative Space Requirements	Site Typology
Medical Technology and Life Sciences	Availability of skilled labour. Reasonable links to R&D centres and healthcare Institutions.	Range of premises, from large laboratories and workshops to small incubator units for start-ups. Larger high specification units to provide move-on space.	<ul style="list-style-type: none"> <li>• Science/R&amp;D park</li> <li>• Office/business park</li> <li>• Mixed employment area</li> <li>• Industrial/advanced manufacturing park.</li> </ul>
Digital and ICT	Skilled workers Fast links to City Centre /airport. Fibre broadband access critical. Quality of life/profile of location key to attractiveness.	Wide range of premises, high quality offices to small-scale studios, industrial and incubator units	<ul style="list-style-type: none"> <li>• Office/business park</li> <li>• Central mixed-use employment areas.</li> </ul>
Professional and Business Services	Access to clients and markets. Availability of skilled workers. Access to high quality transport links	High quality office space, with a range of floorspace requirements, comprising large floorspaces and	<ul style="list-style-type: none"> <li>• Office/business park</li> <li>• Central mixed-use employment areas.</li> </ul>

	and telecommunications. Quality of life / profile of location.	smaller units which may include 'grey space'.	
Advanced Engineering	Workshops for research and design. Testing and measurement facilities.	Wide range of premises, encompassing small to medium sized industrial units, flexible spaces, and high specification office and laboratory units.	<ul style="list-style-type: none"> <li>• Science/R&amp;D park</li> <li>• Industrial/advanced manufacturing park</li> <li>• Mixed use employment areas</li> <li>• Airport business park</li> </ul>
Environmental Goods and Services, Cleantech	Reasonable links to R&D centres/ third level institutions. Availability of skilled labour. Proximity and access to key suppliers.	Range of premises, from offices to industrial units with large sites and ancillary office accommodation	<ul style="list-style-type: none"> <li>• Industrial/advanced manufacturing park</li> <li>• Mixed employment area</li> </ul>
Commercial / Logistics	Strong connectivity and proximity to primary road / rail links, and key centres of population.	Medium to large flexible industrial units with possibility of ancillary office	<ul style="list-style-type: none"> <li>• Industrial/advanced manufacturing park</li> </ul>

Figure 8.1 Specification for Key Employment Growth Sectors

As outlined, the types of premises required by potential growth sectors can vary greatly dependent on business activities. However, there are certain types of sites with a specific scale, form and environment which can accommodate many of the identified needs of the sectors such as office and industrial parks, manufacturing and R&D areas, appropriately located strategic logistics hubs and city and urban centre mixed use locations.

Potential Relocation Sector	Sector Requirements	Indicative Space Requirements	Site Typology
Auto Services	Availability of appropriate labour. Accessible and cost effective locations. Clustering of complimentary activities (tyre sales, mechanic, crash repair, NCT centre etc.).	Small to medium units, extensive forecourt areas. Areas with profile to road network/ volumes of passing traffic.	<ul style="list-style-type: none"> <li>• Office/Industrial park</li> <li>• Mixed employment area</li> </ul>
Trade Suppliers (builder suppliers /heat merchants / agri products / fuel stockists)	Access to suitably skilled labour. Cost effective locations. Accessibility for	Small to medium scale light industry and warehousing units. Large	<ul style="list-style-type: none"> <li>• Industrial park</li> <li>• Mixed employment areas</li> </ul>

	commercial and heavy vehicles, as required.  Adequate buffering from sensitive receptors to noise, dust or other impacts (residential, schools etc)	semi-covered and outdoor space requirements.  Potential for expansion.	
Light Industrial – manufacturing	Access to suitably skilled labour. Cost effective locations Connectivity to National Road Network and centre of population.	Medium to large flexible industrial units with possibility of ancillary office	<ul style="list-style-type: none"> <li>• Office/Industrial park</li> <li>• Mixed employment areas</li> </ul>

**Figure 8.2** Specification for Potential Relocation Sectors

The planned redevelopment of the north and south docks in Cork City will necessitate the relocation of some older and more traditional industries to other locations over time. It is important that these jobs are retained in Cork City as part of the regeneration process and that the new Development Plan supports the decanting of existing uses through the provision of alternative and viable locations. The nature and characteristics of such sectors means accessible and cost-effective locations are of key importance.

## 8.2 Identification of Employment Locations

### 8.2.1 KEY GUIDING PRINCIPLES

The identification of future employment locations was advanced based on a review of existing land use zoning designations; governing policy related to strategic employment locations; the findings of the baseline review; and extensive discussions with members of the project steering group. The key guiding principles for location identification included the following:

- Consideration of the appropriateness of existing locations to support the expansion of current enterprises.
- Consideration of areas which can address employment blackspots and/or other legacy issues, with specific reference to the socio-economic profiling completed as part of this report.
- Responsiveness to economic opportunities. The ability of a site to meet specific growth sector opportunities emerging in a particular location, including stimulus or industry clusters.
- Areas which support existing sectoral and location-based strengths and synergies with existing employers.
- Potential relocation of enterprise and the extent to which this could facilitate the release of urban land for more efficient use.

- Connectivity and serviceability of areas, including potential contribution towards the achievement of sustainable transport goals. The ability of sites to come forward in the life of the plan based on servicing requirements.
- Marketability and attractiveness. Track record of delivery, committed investments and ability of areas to cater for market demand.
- Provision of new jobs near existing and planned key centres of population, and the achievement of spatial balance in terms of geographical location of employment sites in the city.
- Contribution of areas to future placemaking, including compatibility and integration of uses.
- Meeting extra-local objectives. Ability of lands to deliver on wider regional and national economic development goals.

## **8.2.2 FUTURE EMPLOYMENT LOCATIONS**

Based on existing land use zonings, there is presently a surplus of employment land in the Cork City administrative area when compared with the preferred growth scenario. Based on the quantitative and qualitative analysis undertaken, it is necessary to critically review the extent to which existing zoned land can and will contribute to practical employment delivery in the life of the new Development Plan, and whether alternative lands are better placed to cater for the identified growth and relocation sectors, as well as the key priority principles outlined above.

This section presents the findings of the project team in respect of this review. It proposes new employment locations based on key priority principles for the identification of such areas, and secondly, makes a number of recommendations in respect of existing locations.

### **New Sites**

A total of seven new sites are identified as having potential to be allocated for employment purposes. The following site assessment pro-formas outline the rationale for their inclusion and classify the locations serviceability, based on the 'tiered approach to land zoning' set out in Appendix 3 of the National Planning Framework.





Ref. NS1

Location Blarney Business Park Extension

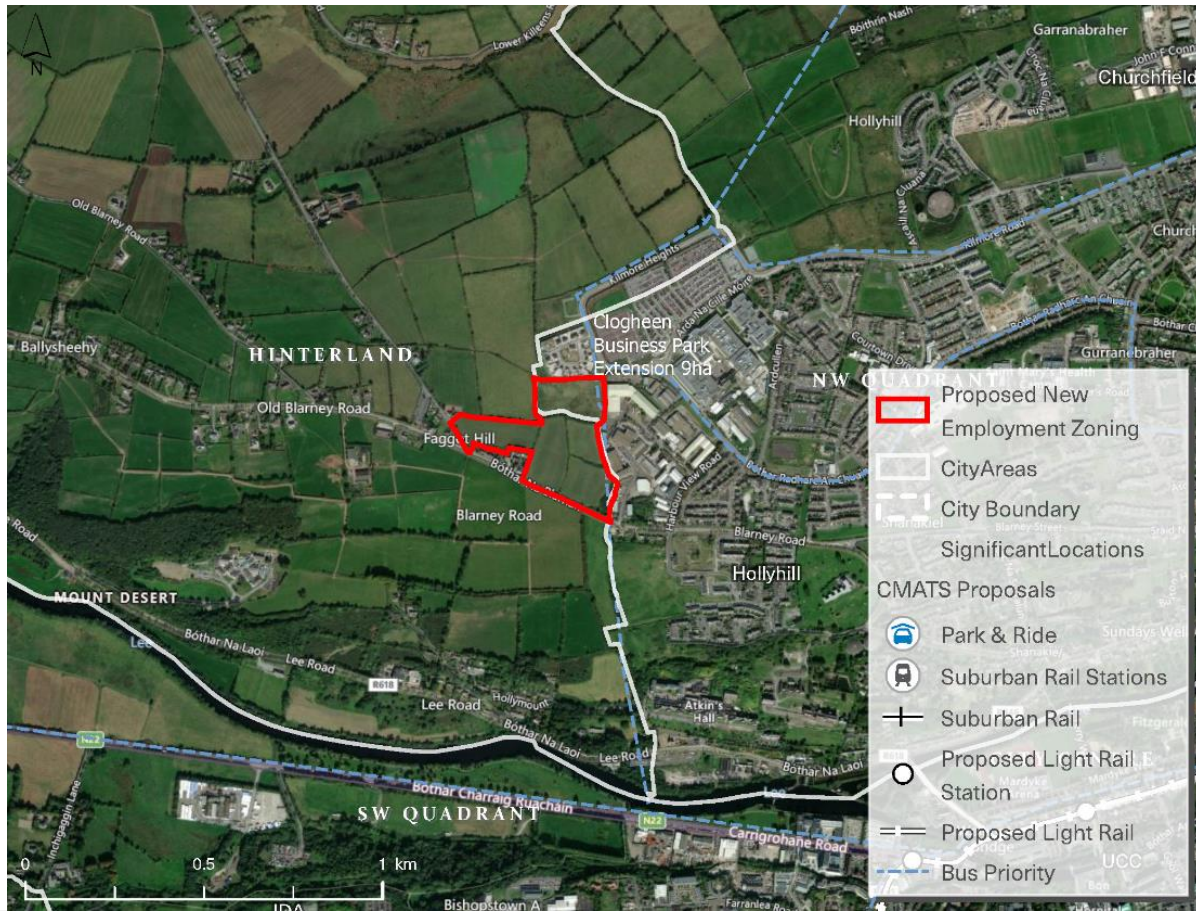
**Summary** Blarney Business Park is a strategically located business campus located east of Blarney and approximately 6km north of Cork City. The site was acquired by JCD in 2018 and it has become a major employment success story over the last three years, attracting quality engineering, manufacturing and distribution tenants.

The extension of the Business Park to the east represents an opportunity to underpin the significant recent investment in the area and capitalise on proximity to the N20 and the planned railway station at Stoneview. It would meet a number of guiding principles identified in the RSES for strategic employment locations, including expansion of existing enterprises and supporting existing sectoral and location-based strengths. Blarney is large urban area and an extended business park would facilitate significant job creation.

The N/M20 Cork to Limerick Road Scheme is currently at option selection stage, which is assessing the feasibility of different possibilities to upgrade the N20 at this and other locations. It is noted that one of the route options extends to the east of the identified expansion lands. At this point in time, the presence of this option does not preclude the subject lands for potential consideration for employment use.

The extent of recent investment in Blarney Business Park means it can cater for existing demand in a short term. It also stands to benefit from potential road improvements in the area, in the form of the Northern Ring Road and/or the Northern Distributor Road

**Servicing** Tier 1 classification



Ref. NS2

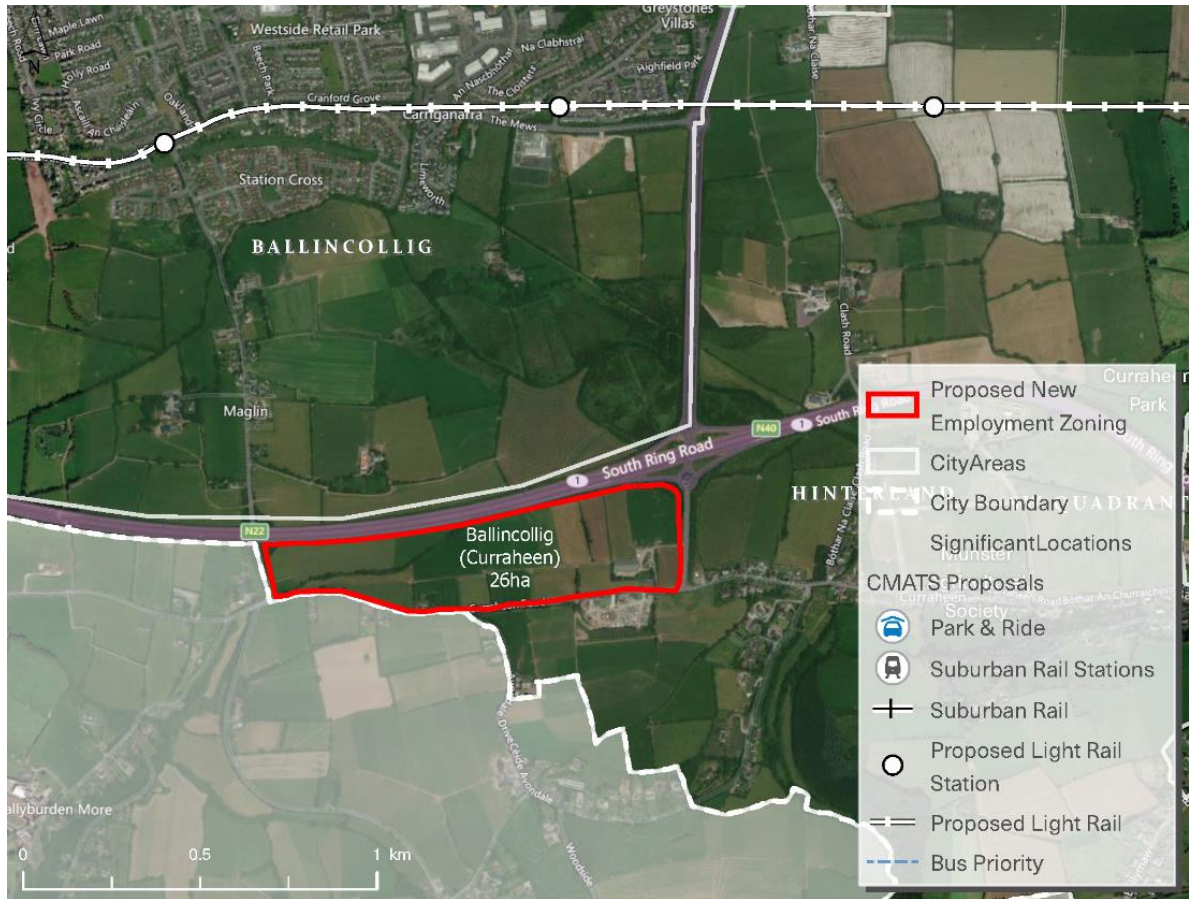
Location Clogheen Business Park Extension

**Summary** Clogheen Business Park is situated in the north western environs of Cork City, accessed from Blarney Road from the south. The Park was constructed in the early 2000s and includes specialist engineering, light industrial and commercial tenants, including home and building suppliers, and auto services. The Hollymount Industrial Estate is situated adjacent to the north, with the Apple European Headquarters located further north. The subject lands are located to the west and represent an opportunity to extend the footprint of the business park in a sustainable manner.

The site is within the study area for the Northern Distributor Road, the delivery of which will further improve access. The proposed multi-modal route will act as a key enabler for the area facilitating movement of heavy goods vehicles to employment areas and supporting the development of the cycle network in the city's northside. Within this, the route will also provide for an upgraded orbital bus service linking Kerry Pike, Apple Campus and the city centre. Elsewhere, local water and wastewater services exist in the area. While there is a watercourse on the site, it is not identified on OPW mapping as an area of preliminary flood risk.

It is considered that provision of additional employment lands in this area would provide for decanting opportunities of existing enterprises from Cork Docklands and assist positively in terms of providing additional jobs in an area of high unemployment.

Servicing Tier 1 classification



**Ref.** NS3

**Location** Curraheen, Ballincollig

**Summary** The subject lands are situated south of Maglin Urban Expansion Area in Ballincollig, immediately adjacent to N22/N40 Ballincollig East junction. The location is considered to have potential as a future logistics centre given its strategic location within 30 minutes of the deep-water port at Ringaskiddy and with direct access to the M22 Cork/Killarney Motorway, and by extension west Cork.

Under MASP policy objective 8, the RSES identifies the need to support inter urban and interregional freight/goods traffic around metropolitan Cork, which includes provision of logistics and delivery centres. This has become a growth sector over the last 12 months due to Covid-19 and the potential market opportunities presented by Brexit. The designation of the subject lands for employment use would diversify and increase employment opportunities in a large urban area which is earmarked for further residential and employment growth.

The site is located adjacent to proposed greenway routes, and the planned future light rail corridor, providing direct links to Ballincollig, Cork Science and Innovation Park and Bishopstown.

**Servicing** Tier 2 classification



Ref. NS4

Location Ballyvolane (Garraneboy)

**Summary** Situated in the townland of Garraneboy, the subject lands are located off the Ballyhooly Road (R614), immediately north and west of the Ballyvolane Urban Expansion Area (UEA). This part of the north Cork City environs was identified as a significant employment-led growth location under the 2008 update of the Cork Area Strategic Plan (CASP). The site is within 200 metres of other zoned employment land (NE-B-01) on the western side of Ballyhooly Road.

Significant residential development is proposed to the south in the UEA, a first phase of which for approximately 750 homes has been granted planning permission at Longview Estates. The subject site presents an opportunity to co-locate important employment proximate to this.

The aforementioned residential development includes significant infrastructure upgrades works including water and wastewater services. A new public sewer is being designed for the area which will bring the network within reach of the site. Improvements to the local road network will be critical to development at this location, part of which will necessitate appropriate pedestrian and cycling infrastructure. Preliminary work on the northern distributor road is being advanced, the ultimate delivery of which will open up the area in terms of strategic accessibility. It is considered that that designation of these lands now for employment use will secure future opportunities for jobs growth commensurate with population growth in the coming years.

Servicing Tier 2 classification



Ref. NS5

Location Glanmire (Killydonoghue)

**Summary** At 11.2%, Glanmire exhibited the largest percentage population growth rate of all Cork City settlements over the 2011-2016 intercensal period. While the settlement has a large urban population, it does not presently have any zoned employment land. It is considered that the subject location has significant potential to function as a logistics/distribution centre. It is located within 30mins from the Deep-Water Port of Ringaskiddy and with direct access to the M8 Dublin Cork Motorway at Junction 18 using current infrastructure. Existing road proposals including the Dunkettle Interchange upgrade and the M28 Cork/Ringaskiddy Motorway will further reduce travel times and impact to the environment.

The residential areas of Glanmire are within a 5 minute drive, with walking and cycling a realistic option from a number of residential areas based on greenway proposals in the area. The site is within the study area for the Northern Distributor Road and potential future Northern Ring Road. There are limited existing employment opportunities in the local area, and in accordance with the RSES, a formal employment designation could facilitate job creation in an urban area where it can be catered for through infrastructure servicing and proximity to transport interchanges.

Servicing Tier 2 classification



**Ref.** NS6

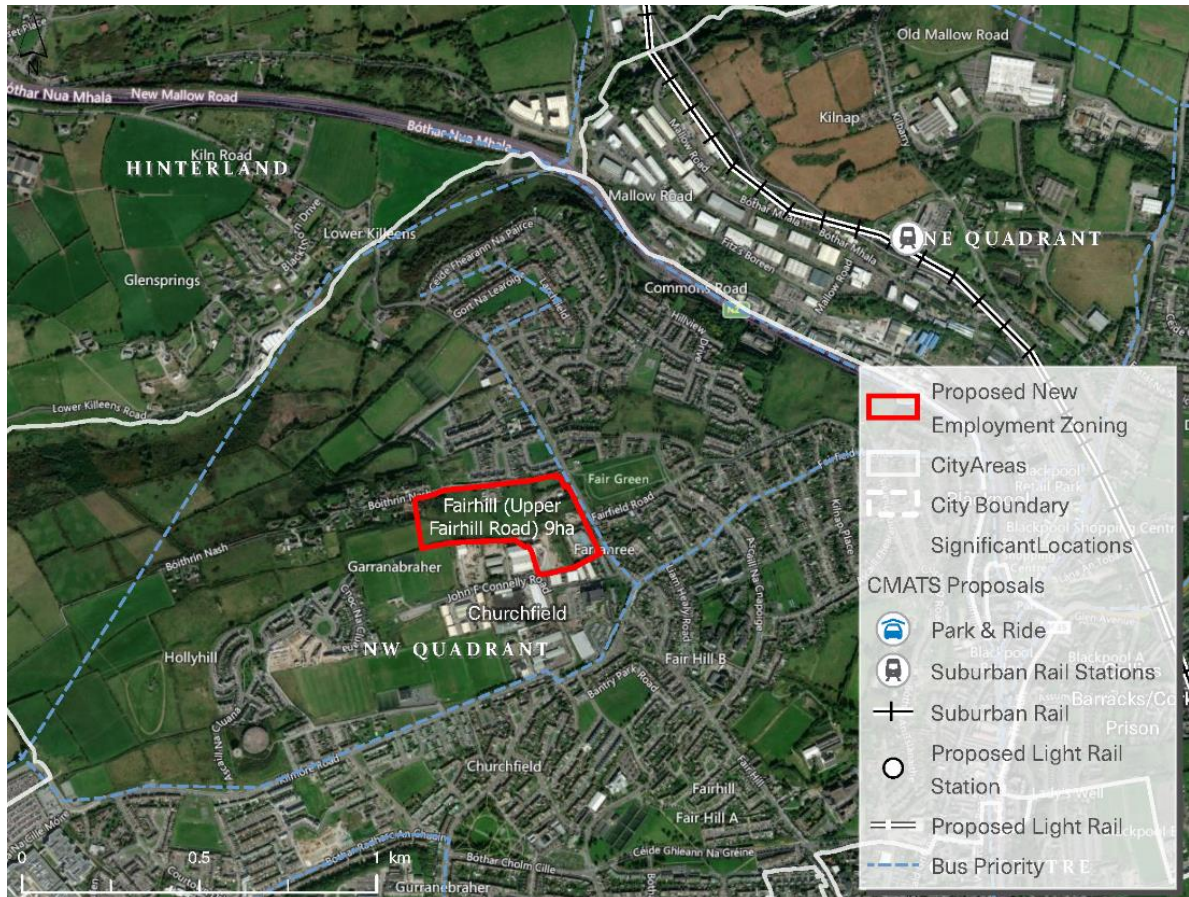
**Location** South Link Industrial Estate

**Summary** The subject lands are located on the southern side of the Kinsale Road (N27) between Cork International Airport / Cork Airport Business Park to the south and the Kinsale Road Roundabout to the north. The site is currently vacant. Bounded by Ferrero Rocher and the South Link Industrial Estate to the south and Lehan Motors to the east, the character of the surrounding area is commercial in nature. As such, the site naturally lends itself to employment use.

Airport Hill is a busy roadway and during peak hour periods, traffic queuing and delays can be experienced. The site is presently constrained in terms of vehicular access, with a workable solution likely to include wider works in the area encompassing new link roads and upgrades on Forge Hill and Ballycurreen.

Water and wastewater services exist in the area and the site is on a planned BusConnects route, which includes cycle and walkways improvement objectives. With access achieved onto the N27, the site is deliverable. Any designation for employment purposes will contribute to compact development form on what is a strategic access corridor in the city. It would accord with RSES principles to facilitate the sustainable expansion of employment enterprise where complementary adjoining uses currently exist.

**Servicing** Tier 2 classification



**Ref.** NS7

**Location** Fairhill (Upper Fairhill Road)

**Summary** These lands are located off the Upper Fairhill Road, Gurrabraher, in the northwest suburbs of Cork City. The site is situated north of the Churchfield Industrial Estate in an area which is characterised by mix of light industry uses, waste recovery and waste recycling facilities. 5.12 hectares of the site fronting Nash’s Boreen is currently zoned for residential development under the Cobh Municipal District Local Area Plan 2017. Having regard to the existing concentration of industry, it is considered that alternative use for employment purposes would complement and reinforce the existing local employment offer.

The local area is an unemployment blackspot in Cork City. There has been significant State investment in the City Northwest Regeneration Project and there is a requirement to provide appropriate employment opportunities for existing and future residents. Further, it is considered that the site could have a key role to play in facilitating relocation of existing uses from Cork Docklands.

Water and wastewater services exist in the local area, but there may be a need for some local road improvements to support development.

**Servicing** Tier 1 classification

## Existing Locations

A number of existing employment locations in Cork City have not come forward for development based on a mix of factors related to scale, servicing and attractiveness to the market. Many of these lands were previously zoned on the basis of sound planning rationale and have an important role to play in terms of future economic development.

The existing strategic locations have been reviewed by the project team, with the following recommendations put forward.

### *Cork Science and Innovation Park*

The development of the Cork Science and Innovation Park (CSIP) in the South West of the city is identified as a key future growth enabler for Cork in the NPF, and as such, represents an extra-local objective with the ability to deliver on wider regional and national economic development goals. The location of the site represents a significant opportunity to develop formal operational links between higher education institutions, research organisations, and industry in the facilitation of medical, technology and life sciences. Based on CMATS and other defined local objectives, the site is located at a confluence of planned infrastructure investment which includes light rail, greenways and cycle routes. It has the key attributes to deliver substantial and tangible economic growth for Cork and the wider region in the years ahead

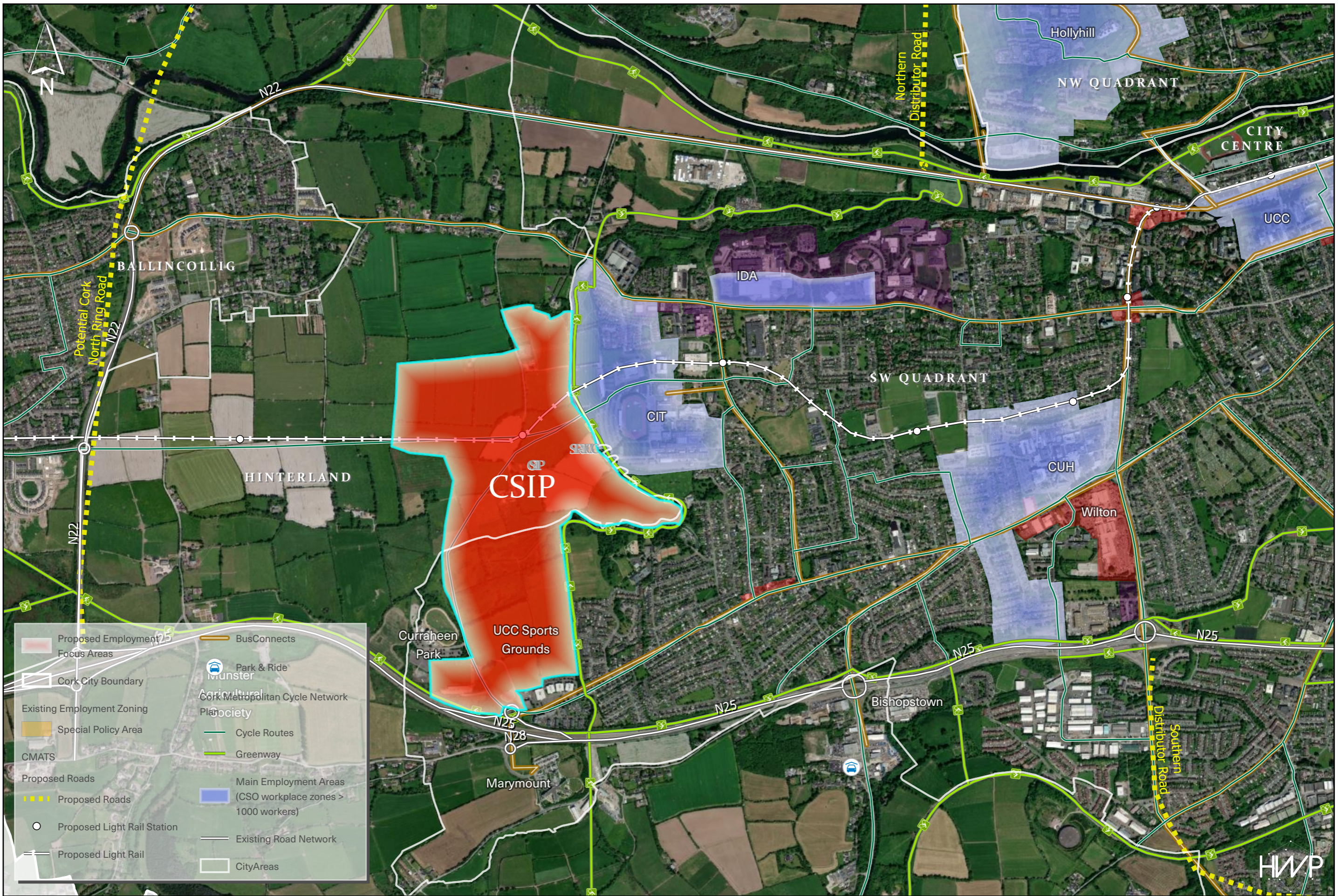
The current masterplan for the CSIP dates to 2011. It covers a large landbank of 101 hectares of zoned land, but practical delivery is currently constrained by a number of factors which include scale of the study area, entry requirements for development, and fragmented land ownership. The masterplan needs to be reviewed with a renewed focus on delivery in the life of the forthcoming Development Plan. Appropriate consideration should be given to a reduction in the zoned employment land component of the CSAIP, whilst safeguard future expansion options, and the co-location of a supporting mix of uses to create a vibrant live/work community. Policy thinking on the layout of such employment areas has shifted in the intervening years, with an emphasis on placemaking an essential aspect in attracting inward investment. A focus should also be placed on necessary short-term infrastructure investment to enable development and strengthening of linkages with MTU and UCC.

### *Kilbarry*

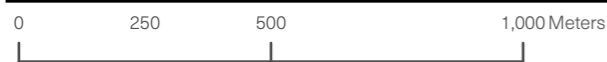
Historically, the Cork Area Strategic Plan identified Kilbarry, along with Ballyvolane, as a strategic employment location in the northern environs of Cork City. The existing 82 hectares zoning which comprises the Kilbarry lands has only seen piecemeal development, which has been concentrated in the southern half of the land bank. Significant parts of Kilbarry have not been subject to development interest and there are a number of underlying issues related to market attractiveness and strategic access which have mitigated against this. In terms of the latter, this includes restricted vehicular access from the existing roads network, specifically the skew bridge on lower Dublin Hill and junction with Redforge Road (Blackpool).

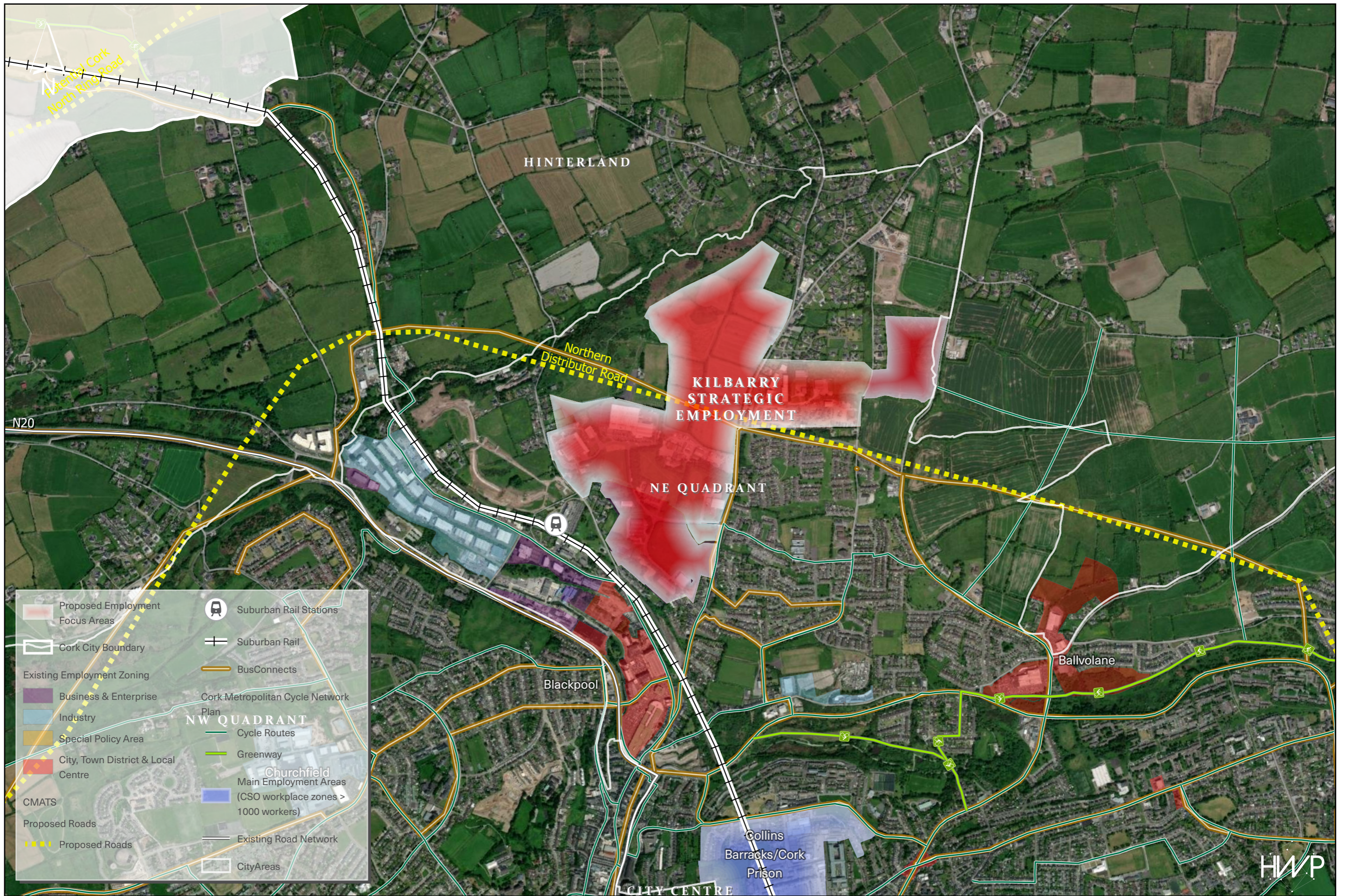
It is recommended that appropriate consideration should be given to reducing the employment-based land allocation in this area on the reasonable basis of continued non-delivery in the short-medium term. It is possible that the promotion of other uses including residential and community services, as well as planned infrastructure improvements related to sustainable travel may underpin the existing employment officer locally, and provide an improved basis on which additional investment in employment can be secured.





Proposed Employment Focus Areas	BusConnects
Cork City Boundary	Park & Ride Munster
Existing Employment Zoning	Cork Metropolitan Cycle Network
Special Policy Area	Cycle Routes
CMATS	Greenway
Proposed Roads	Main Employment Areas (CSO workplace zones > 1000 workers)
Proposed Roads	Existing Road Network
Proposed Light Rail Station	CityAreas
Proposed Light Rail	





### *Office Development*

A review of commercial activity confirms that Cork City Centre remains the most attractive location to the market for office accommodation. Based on forward projections, this trend is expected to continue into the future. City centres have reemerged as the most important locations for business, with lifestyle, clustering of uses and collaboration practices driving demand. In the case of Cork, this has been underlined recently by some high profile floorspace lettings in new offices in the docklands, notwithstanding the ongoing Covid-19 pandemic. Based on a review of Savills market data, it is fully expected that office requirements in the life of the forthcoming Development Plan will be catered for in the city, supported by the continued redevelopment of the north and south docks.

The supply of additional commercial office space greatly improves footfall in urban areas, supporting retail and other services. It is recommended that an appropriate allowance be made for office development in future masterplanning of special policy areas such as Tivoli, as well as within urban towns and district centres.

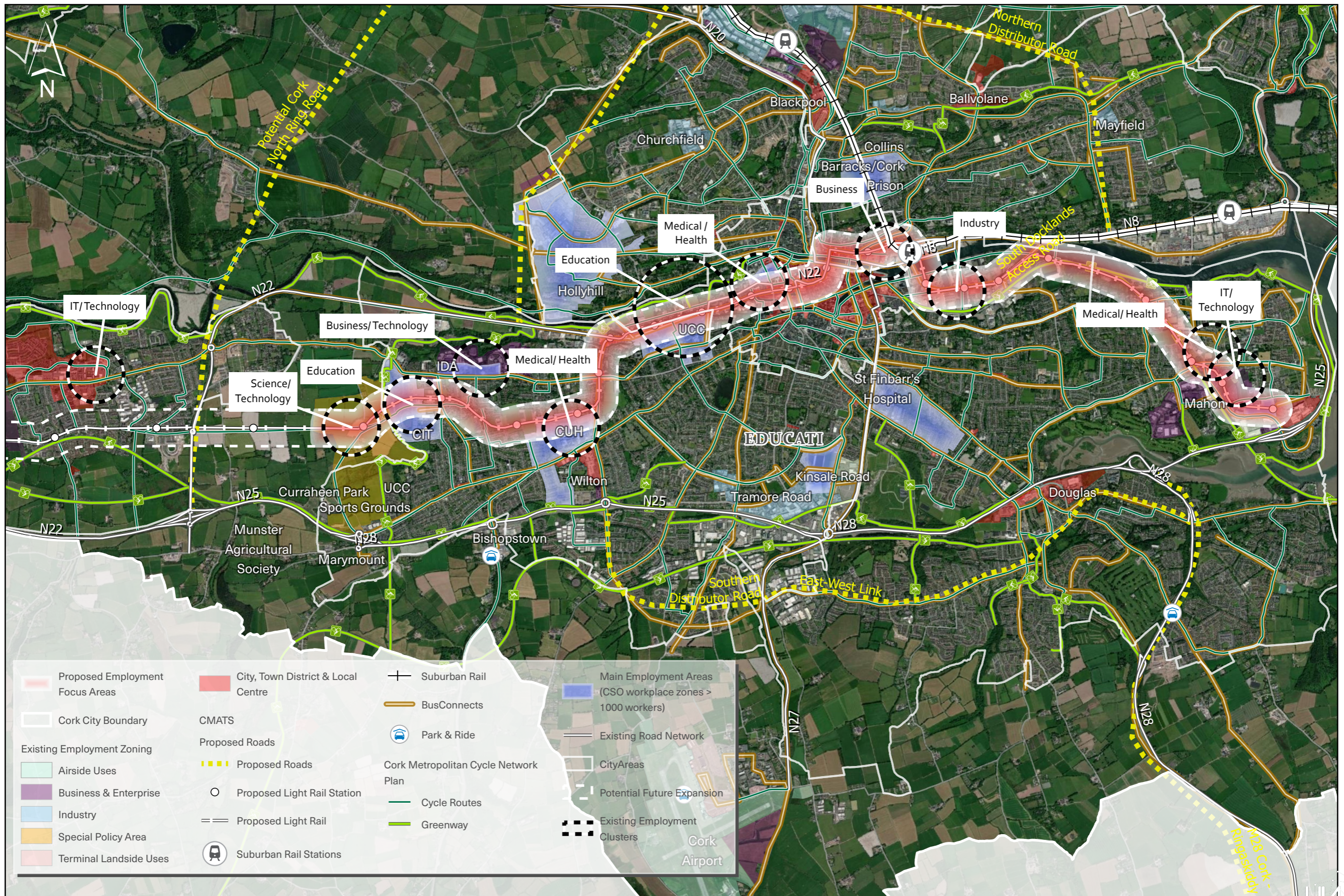
It is noted that office floorspace caps of 10,000 sq m and 100 sq m currently apply in district and neighbourhood centre locations based on the ZO8 and ZO9 policy objectives in the Cork City Development Plan 2015. It is considered that it might be prudent to review these policies with a view to including an exceptions clause in relation to district centres, and separately, and an increased floorspace cap in the case of neighbourhood centres to support employment delivery by means of greater flexibility in approach.

### **Other Matters**

#### *Innovation Corridor*

Over the last year, the possibility of developing an innovation spine along the path of the planned east-west light rail transit corridor between CSIP (with a future extension to Ballincollig) and Mahon has emerged as an attractive proposition. This transit route, which will be served by a quality bus corridor in the first instance, will connect a number of key enterprises and institutions in the areas of health, technology and life sciences. It is a strong concept which has significant potential to create a network of innovators, investors, workers, employers, and service providers to support job creation and economic growth. The key attributes may include the following:

- Creation of an innovation ecosystem at the heart of the city, promoting the clustering of likeminded businesses, synergies, and enterprise cultivation.
- Business community identity, brand and image development.
- Strategic coordination of research, higher level education, public and private-sector innovation growth.
- Creation and retention of quality jobs, training and skill development.
- Physical and economic placemaking combining quality physical space with collective social fabric.
- Development of support services and spinoff entrepreneurship.



### *Decanting of Jobs from the Docklands and Tramore Valley*

The redevelopment of the Docklands and Tramore Valley in accordance with Cork City Council's policies to promote the more efficient use of the lands and higher density employment job, will lead to the displacement of existing jobs. The City Council estimate that approximately 4,000 jobs could be displaced over time. The profile of many of these jobs are typically light industrial, bulk breaking, storage and distribution.

The City Council area has an industrial vacancy rate of just 1.61% and has 11.6% of the zoned industrial land in Metropolitan Cork. Without an uplift in amount of zoned land in this category, it is possible that a significant proportion of these jobs could be lost to the Metropolitan area outside the functional area of Cork City Council of to the wider Cork County Area.

Based on the profile of the businesses to be decanted from traditional areas, their primary consideration is likely to be cost. This is due to the fact these businesses may have historic tenancy rights on relatively low rents, own small premises on small sites or have businesses which would not support higher costs.

To ensure the retention of these jobs and facilitate the delivery of wider aspirations for the regeneration of the Docklands and Tramore Valley, it is considered that additional appropriately zoned lands are necessary, and secondly, that any relocation process needs to be supported and led by the Council or other nominated entity. Based on researched experienced elsewhere, this may extend to financial supports and/or promotion of serviced sites initiatives.

# 09. Strategy Recommendations

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The principal recommendations of this report are set out below as a basis of guiding the direction of future employment strategy.

Please note that the subject report is one of a number of support studies being prepared to inform the review of the Cork City Development Plan 2022-2028. The recommendations set out are the independent views of the project team and Cork City Council will consider these before drafting its Development Plan policies.

## 9.1 Growth Scenario

Based on a growth target of 31,042 jobs by 2028 and the need to cater for decanting of existing jobs from north and south docks, it is recommended that the forthcoming Development Plan make provision for a minimum of 228 hectares of zoned employment land to cater for future office and manufacturing (light industry and logistics) requirements. This represents the mid-growth scenario based on reasoned modelled assumptions related to the disaggregation of future jobs and subsequent floorspace and land requirements.

## 9.2 Strategic Employment Locations

It is recommended that the following new employment locations be zoned for employment use:

- NS1: Blarney Business Park Extension
- NS2: Clogheen Business Park Extension
- NS3: Curraheen, Ballincollig
- NS4: Ballyvolane (Garraneboy)
- NS5: Glanmire (Killydonoghue)
- NS6: South Link Industrial Estate
- NS7: Fairhill (Upper Fairhill Road)

### 9.2.1 CORK SCIENCE AND INNOVATION PARK

The development of the Cork Science and Innovation Park (CSIP) is a critical importance to future economic growth of Cork City and the wider Southern Region. The 2011 CSIP Masterplan should be reviewed with a renewed focus on practical delivery in the life of the new Development Plan. As part of this, appropriate consideration should be given to a reduction in the zoned employment land component, with a view to promoting other compatible uses to support the areas development.

### **9.2.2 KILBARRY**

There are key underlying issues related to market attractiveness and site access which have mitigated against the development of large tracts of this strategic employment site. It is recommended that consideration should be given to reducing the amount of zoned employment land at this location on that basis.

### **9.2.3 INNOVATION CORRIDOR**

The planned development of an innovation corridor along the path of the planned east-west light rail transit corridor between CSIP and Mahon is a strong concept, which could create an important business ecosystem at the heart of the city contributing to economic and employment growth. The development of this concept should be supported as part of the forthcoming Development Plan.

## **9.3 Land Use Zoning**

Based on a review of commercial market information, the availability of industrial/manufacturing space is limited at present in Cork City. Appropriate consideration should be given to the rezoning of some of existing 'Business and Technology' lands to a 'Light Industry' category to cater for demand.

It is expected that the bulk of future office space demand arising during the life of the forthcoming Development Plan will be catered for in Cork City Centre. Notwithstanding this, it is recommended that an appropriate allowance be made for office development in future masterplanning of special policy areas such as Tivoli, as well as within urban towns and district centres.

Objective ZO9 of the current Cork City Development Plan 2015 places a 100 sq m floorspace cap on office developments within neighbourhood centres. This is a very prescriptive and low threshold for office use which can support the viability of such centres. It is recommended that consideration should be given to increasing this figure to a minimum of 300 sq m to support local employment creation, subject to not undermining the primary purpose and function of such centres.

## **9.4 Relocation of Employment Uses**

The planned redevelopment of the north and south docks in Cork City will necessitate the relocation of some older and more traditional industries. This is a significant policy challenge which must be addressed through the provision of viable alternative locations. Alongside the zoning of land, we consider that it will be necessary for the Council or other nominated entity to assume a leadership role in facilitating such relocation. The nature of many of the businesses to be relocated is such that they may not be able to sustain the cost of moving. Focused policy interventions and/or financial supports may be necessary. This development of a serviced sites initiative may support this relocation process in practice.

## **9.5 Monitoring and Review**

The Council should monitor changes in employment land through planning permissions, commencements and completions to ensure that sufficient land is available to support the preferred employment growth scenario over the Development Plan period.

# Appendices

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## Appendix A:

Savills Building Grading Classification

## Appendix B:

Employment Locations Services Categorisation (MHL Consulting Engineers)



## Appendix A: Savills Building Grading Classification

### Office Grade

- Grade A – Buildings completed or substantially refurbished within the last 10 years within prime locations – City Centre or suburban.
- Grade B – Either buildings completed within the last 10 years but in a secondary location or older than 10 years but in a prime location and in good condition.
- Grade C – All other stock.

### Industrial Grade

- Grade A – Buildings completed or substantially refurbished within the last 10 years to a modern specification in prime Industrial locations.
- Grade B – Buildings completed older than 10 years but in a good location and in good condition.
- Grade C – Older specification buildings, potentially having lower eaves, asbestos roofs and potentially in poor condition.

These definitions have been used as a broad guide only to categorise existing building stock. Professional judgement has been exercised in this classification.

## Appendix B: Employment Locations Services Categorisation

No.	Location	Tier Category
<b>Existing Employment Locations</b>		
1.	Kilbarry	2
2.	Hollyhill	1
3.	Ballyvolane	2
4.	Blarney	1
5.	Ballincollig	1
6.	St Michaels Drive	1
7.	Cork Science and Innovation Park	1
<b>New Employment Locations (Recommended)</b>		
8.	Ballincollig (Curraheen)	2
9.	Glanmire (Killydonoghue)	2
10.	Fairhill (Upper Fairhill Road)	1
11.	Clogheen Business Park Extension	1
12.	Ballyvolane (Garraneboy)	2
13.	South Link Industrial Estate	1
14.	District Centres (Douglas, Wilton and Blackpool)	1

*Categorisation process completed in accordance with the 'tiered approach to land zoning' set out in Appendix 3 of the National Planning Framework.*

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Comhairle Cathrach Chorcaí  
Cork City Council

