

**Cork Area Strategic Plan – Strategy for
Additional Economic and Population
Growth - An Update**

**Indecon International Economic
Consultants, RPS and Savills HOK**

Indecon



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Executive Summary

Background to the Cork Area Strategic Plan

The Cork Area Strategic Plan (CASP) is a pioneering initiative jointly sponsored by Cork City Council and Cork County Council which provides a vision and strategy for the development of the Cork City-Region up to 2020.

The original CASP which was published in 2001, set out a broad brush strategy which aimed to provide guidance as to the general direction and scale of growth which would enable the Cork City-Region to provide a high quality of life and opportunity for all of its citizens over a 20-year period. The strategy appropriately sought to move towards a more sustainable form of development for the Cork City region. In particular, the CASP set out a framework that would enable the Cork City region to:

- ❑ Attain critical mass;
- ❑ Integrate land use and transport;
- ❑ Make efficient use of investment in infrastructure;
- ❑ Provide a high quality environment; and
- ❑ Improve the competitiveness and attractiveness of the region.

This Update of CASP which was prepared with the assistance of Indecon International Economic Consultants, RPS Consultants and Savills HOK, is designed to build on the strengths of Cork and to facilitate Cork to become a leading competitive European city-region. It takes account of revisions needed to reflect economic, market and policy developments since the CASP was prepared and places particular emphasis on the implementation of policies to achieve the goals of the CASP. It also includes an increased focus on the economic and investment strategy. The updated Strategy has also been designed to meet the Government's national policies on spatial strategy and on climate change adjustments contained within the National Climate Strategy 2007-2012. The implementation of this CASP update will be the most effective means through which the Cork planning authorities can assist in the delivery of the National Climate Strategy 2007-2012.

The Study Area

The CASP covers an area determined by a journey time of about 45 minutes from Cork City. This area has been defined as the Cork City-Region and includes Cork City, the satellite towns of Midleton, Carrigtwohill, Carrigaline, Ballincollig and Blarney, and the Ring Towns and rural hinterlands of Bandon, Macroom, Mallow, Fermoy, Youghal and Kinsale.

Cork Area Strategic Plan Spatial Outline



Source: CASP (2001)

Objectives of Updated Strategy

This update modifies the 2001 CASP and delivers an updated strategy which provides a significant enhancement in economic growth and accommodates a greater population than originally envisaged. The update achieves this while adhering to the key goals for the City-Region which were agreed as part of the 2001 plan. The goals set for the CASP remain valid and the key issue for this update is to align the implementation of policies with these goals which cover the following areas:

- ❑ Economic growth
- ❑ Social inclusion
- ❑ Balanced spatial development
- ❑ Environment
- ❑ Urban renewal
- ❑ Transportation
- ❑ Infrastructure

Within both the spatial area and time horizons defined in the CASP 2001, the updated strategy, in particular:

- Identifies an economic development strategy for the CASP area that will deliver a major uplift in economic growth and employment capable of sustaining the increased population now being targeted at the area; and
- Taking account of this new strategy and the revised population targets for the area, revises the existing CASP spatial development and transportation strategy for the city-region, building on the key goals identified in the 2001 plan.
- Sets the updated strategy for economic and population growth and transportation within the context of the other key CASP 2001 goals of social inclusion, urban renewal and a high quality environment.

Progress in Implementing the CASP

In preparing this update of the CASP, it is necessary to reflect the fact that significant progress has been made since 2001 but that the spatial allocation of population has not been aligned with what was envisaged in the CASP. A redirection is required to ensure consistency with the original CASP goals. Among the key developments to date are the following:

- The CASP overall population forecast was very accurate and the 2006 Census figures are almost the same as the CASP projections.
- The City population has declined and is well below CASP expectations but the rural areas generally and Ring Town hinterlands grew much faster than anticipated. The necessary measures to address this decline in the population in the City are dealt with in this updated CASP strategy. Also of significance is that the population growth of the rural areas around the Ring Towns has exhibited higher growth than the towns. Population was therefore more dispersed than concentrated which is not aligned with what was envisaged in CASP.
- In the rest of Metropolitan Cork the population in the Southern periphery of the City overshot the CASP targets while other areas such as Midleton were behind projected levels.

A summary of progress on CASP population forecasts is presented below.

Summary of Progress on CASP Forecasts by Region - Population

Area	CASP 2000	2006 Indicative Implied Projection	Actual 2006 Population	Difference - Actual-Projection
Cork City	123,810	128,719	119,522	-9,197
Rest of Metropolitan Cork	127,700	149,366	153,019	3,653
Ring Towns and Rural Areas	93,590	98,916	105,055	6,139
<i>Of which:</i>				
Rural Areas	53,560	52,269	61,428	9,159
CASP Total	345,100	377,000	377,596	596

Source: Indecon Analysis of CSO data and CASP targets

Key Plan Metrics and Scale of Anticipated Growth

The new updated plan for CASP is underpinned by an updated set of key strategic targets pertaining to population, jobs and household formation. The key plan statistics are highlighted in the table below which also indicates the progress towards the original 2020 projections in terms of 2006 outturns. In relation to progress to-date, it is notable that the overall population of the City-Region totalled 377,596 in 2006, compared with the original CASP 2020 projection of over 423,000 persons. In terms of employment, the number of jobs located in the CASP area reached almost 171,000 in 2006 compared with the original 2020 projection of 201,370. While job growth to 2006 was slightly less than anticipated, this may have reflected over optimistic projections for employment contained in the original CASP. The number of households totalled 129,007 in 2006 versus an original 2020 target of over 160,000.

Key Updated Plan Statistics					
	2006 Actual	Implied 2006 Target/Projection	Original CASP 2020 Projection	Updated 2020 Projection	Implied Growth - 2006-2020
Jobs	170,909	173,952	201,370	215,930	45,021
Population	377,596	377,000	423,150	488,000	110,404
Households	130,648	134,950	160,350	202,492	71,844

This updated CASP plan envisages that the population of the CASP Area will grow to approximately 488,000 by 2020, implying an increase on current (2006) levels of some 110,000 persons. The number of jobs is envisaged to expand by over 45,000 to close to 216,000, while the number of households is targeted to rise by approximately 72,000 to 202,000 by 2020.

If these projections are to be realised then the updated CASP plan requires action in the following areas:

- ❑ **Realignment and reinforcement of spatial planning and land use policies;**
- ❑ **Refocusing of economic and investment strategy;**
- ❑ **Front-loading of infrastructure and implementation of integrated transport strategy;**
- ❑ **Specific initiatives to develop the Docklands;**
- ❑ **Implementation of labour force and skills strategy.**

Realignment of Spatial Strategy and Land Use Policies

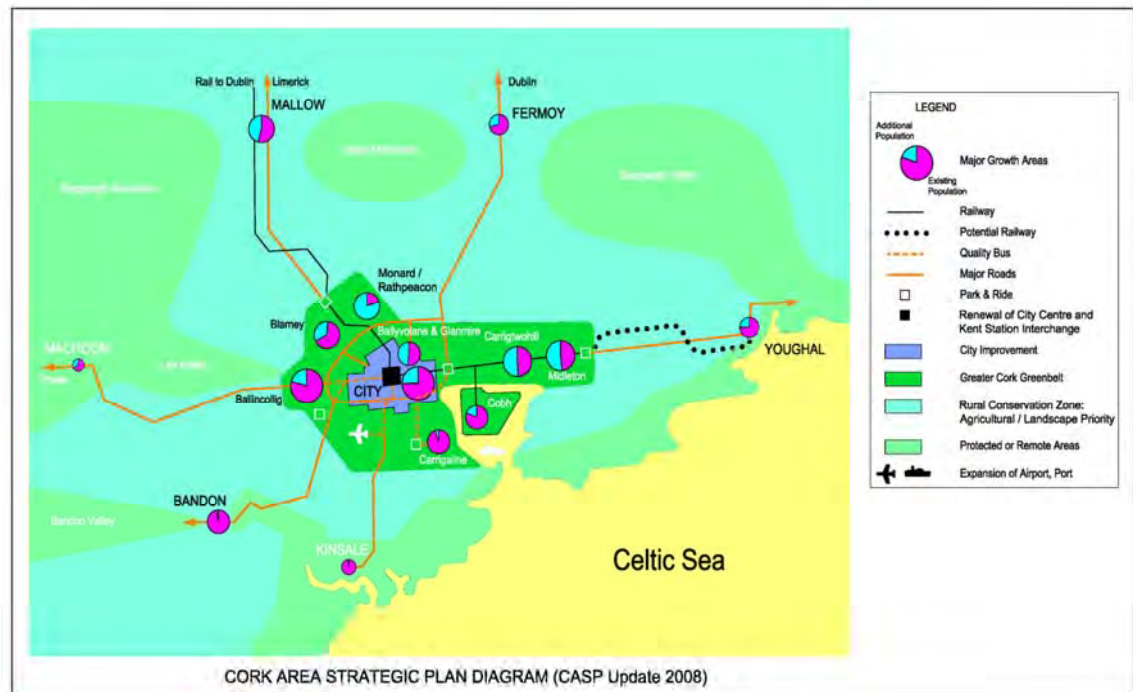
The broad thrust of the original CASP spatial strategy was appropriate but changes are now required to take account of policy developments, market and economic changes to date and the need to accommodate higher targets for population growth. There is a need, in the updated plan, to realign spatial strategy and land use policies with the original CASP strategy. Of particular significance is the need to reverse the decline in population in the City and the rapid expansion in population in rural areas of Ring Towns, contrary to what was envisaged.

A number of spatial options were considered as part of this updated CASP and evaluated against the original CASP goals, including simply permitting a continuation of existing trends. This would, however, have resulted in a decline in the population of Cork City which by 2020 would decline to 106,000 compared to the targeted goal of an increase in population in the City to 150,000.

The proposed spatial strategy involves a realignment of the population growth with the original CASP plan but takes account of market and economic developments, and also reflects capacity issues and the need to support additional rapid transit corridors.

The proposed spatial strategy is in effect a return to the original objectives of the CASP strategy but with adjustments for market and economic developments and with an uplift for NSS population uplift. A readjustment has also been made to take account of the potential for certain new clusters of population and capacity issues. This proposed spatial strategy scores well on all of the key CASP goals of economic growth, social inclusion, environment, balanced spatial development, urban renewal, transport and infrastructure. A presentation of the proposed updated Cork Area Strategic Plan is presented in the figure overleaf.

Schematic Outline of Updated Cork Area Strategic Plan



Source: RPS GIS Mapping

The CASP update gives priority to locations close to the city for new population growth, in addition to the allocation to the city itself and along the railway line. This is designed to meet sustainable development objectives and facilitate public transport provision. It also gives a greater choice of residential location and type for people who would like to live in or close to the city. As a result, a significant increase in population is targeted for Ballincollig and for Ballyvolane.

The employment strategy in this Update places strong emphasis on development of brownfield sites in or near the city. Docklands /city centre is the prime brownfield location. There are also a number of additional locations in the suburbs of Cork such as Mahon, Blackpool/Kilbarry and the Tramore Road area proposed to provide a choice of locations to meet employment needs. It is recognised that development along the rail corridor is consistent with the principle of sustainable development.

The Docklands is vigorously supported in this CASP Update as an optimal location for development in CASP on the basis of economic and environmental sustainability. Planning policies in relation to areas such as parking, office policy and development costs will be implemented to support the development of the Docklands.

The advantage of these locations are that they:

- make optimum use of existing infrastructure – such as water, drainage, transport, services (including shopping, crèches, and other local services);

- are close to existing residential areas or are planned to be developed as mixed use areas, so that people can walk or travel short distances to work, reducing the need to travel;
- are or will be served by high quality public transport.

These locations meet the criteria for sustainable development and will provide a focus for new employment, particularly office and service employment. There are however, often variations between the type of businesses that want to locate in the city centre/docklands and those that locate in suburban locations, although this is not always the case. In this context suburban locations within the built up area of the city can in part serve these markets and we are therefore proposing an intensification in Mahon.

The proposed spatial development of the City is focused on the delivery of additional population and employment growth at Docklands (North and South). It is also proposed that Kilbarry, Mahon and the Tramore Road are developed as strategic employment locations and that Ballyvolane is developed as an additional growth location. The proposed spatial strategy involves reinforcing the City's role as the engine for growth for the region.

In addition to the strengthening of the City Centre's function, the spatial strategy involves developing the Metropolitan towns in particular Blarney, Monard, Carrigtwohill and Middleton in line with recently adopted Special Local Area Plans, and their location along the rail line. This also supports the continued development of Little Island, Ringaskiddy and Whitegate as strategic employment locations, while also identifying Ballincollig as a new strategic employment location. The strategy also involves the strengthening of the urban areas of the Ring Towns, with a focus on Mallow as a hub town, in accordance with the recently adopted Special Local Area Plan. The strategy also takes cognisance of the proposed Atlantic Corridor.

Ideally employment and population would be placed in the same location to reduce commuting and to enhance sustainability. This principle has guided the proposed realignment of the spatial strategy with increased population being targeted for the City where there are significant existing employment opportunities. Increased population and development is also targeted for key centres within Metropolitan Cork and in the Ring Towns. There are however constraints on this policy of directing employment to areas of population because significant population has been located in rural areas, contrary to original CASP goals. There are also constraints in co-locating employment and population due to capacity issues and the need for employers to have access to a sufficiently large pool of skills. In cases where co-location is not feasible the strategy has focused on locating population in areas with access to a rail link and potential rapid transit corridors.

The table below highlights the proposed updated distribution of future population growth implied by the enhanced high-level targets set out above. These revised or updated projections reflect developments in population since the original CASP and the assessment of growth requirements undertaken as part of this update.

Future Population - Enhanced CASP Projections

Area	Original			Implied Population Growth - 2006-2020
	2006 Actual	CASP 2020 Projection	Updated 2020 Projection	
City	119,522	135,820	150,000	30,478
The Rest of Metropolitan Cork	153,019	180,710	216,240	63,221
Ring Towns & Rural Areas	105,055	106,620	121,760	16,705
CASP Total	377,596	423,150	488,000	110,404

Source: Indecon/RPS analysis. Updated 2020 projections take account of NSS uplift.

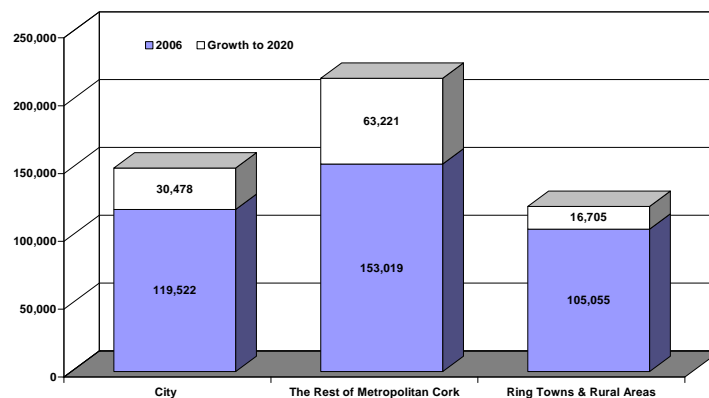
The population targets for CASP have been set by the National Spatial Strategy / Department of Environment, Heritage and Local Government. An updated projection for population in Cork City of 150,000 is identified, while the remainder of Metropolitan Cork is assigned a figure of 216,240 and the Ring Towns and Rural Areas given a population projection of 121,760. These projections are significantly larger than the original 2020 targets for population as set out for each area in the CASP and take account of updated demographic developments. The population projections represent challenging targets and population growths will be linked to the performance of Irish economy as well as developments within CASP. The aspirations of growth in both population and employment will be influenced by the economic climate and while a phased approach is recommended there is a need to closely monitor the targets and to make adjustments subsequently if appropriate.

Impact of Irish and International Economic Developments

If the slowdown in the international and Irish economics continues and if recovery is delayed, this will invariably impact on the feasibility of achieving some of the targets in the short term. It is important however to note that effective economic planning is as or more important in the context of the more difficult economic environment now facing the CASP region. It is essential that the correct investment and planning decisions are made, reflecting the reality of the economic context. Should this happen, it is envisaged that most of the population growth will only occur in the period 2014-2020, and growth over the period 2007-2013 is likely to be faster in the period 2009-2013, compared to the next two years.

The figure below highlights the proposed scale of population growth envisaged, and its distribution within the CASP area, over the remainder of the period to 2020.

Scale of Anticipated Growth - Population



Source: Indecon/RPS analysis

The realignment of spatial strategies and land use policies will also have implications for household formation. The projected levels are presented below. In order to derive the forecast number of households in the CASP region by 2020, rather than projecting forward existing densities (or those implied within CASP (2001)), this Update takes cognisance of the fact that average densities are likely to fall below existing levels by 2020.

Household Formation - Updated CASP Projections

Area	Original CASP 2020 Projection - Households	2006 (Actual) - Households	Updated 2020 Projections - Households
Cork City	51,450	43,971	62,241
Rest of Metropolitan Cork	68,460	50,889	89,726
Ring Towns and Rural Areas	40,440	35,788	50,525
CASP Total	160,350	130,648	202,492

Source: Indecon/RPS analysis

To ensure that Cork can achieve its full economic potential it is necessary to focus strong growth to the City and Metropolitan areas. In order to ensure sustainability and to minimise the use of scarce infrastructure, the Update is proposing to concentrate growth in a limited number of areas. This is also essential to underpin effective transport investment. It is recognised that there are constraints to the timely development in these areas, most notably the lack of infrastructure, and that these constraints must be tackled in the short term.

Co-ordinated approaches between the City and County Councils, as well as other key stakeholders at Departmental level, to tackle the significant constraints to the sustainable and timely development of Cork Docklands, including the relocation of the City Quays and the Seveso sites, is crucial in the short-term, and progress on this will need to be carefully monitored.

The capacity of areas to accommodate growth will also require high densities. Accommodating additional allocated growth particularly along rail line settlements will require adjustments to densities in order to ensure a compact and sustainable pattern of development. This will have to be actioned in a way which meets market requirements from a user perspective, and will mean the encouragement of a mix of dwelling types and sizes within any particular development. We accept that there can be tensions between increased provision of choice of accommodation and higher densities, but this will need to be managed to ensure that the projected increase in population can be met in a sustainable manner, consistent with the CASP objectives.

Future growth in the CASP region needs to be solidly based on the principle of sustainable development and in particular, needs to take place in a way which supports the use of sustainable transport modes (public transport, cycling and walking). The Updated CASP Strategy proposes that development should be directed along the Cork suburban rail corridor, which would support the investment that the Government is making in suburban rail. The Updated CASP Strategy therefore provides a phased approach which gives priority to growth along the rail corridors. In particular, the Strategy envisages that growth would first (under the updated Tranche 2), be directed to locations along the rail line, and in the City/Docklands. This needs to be carefully monitored as less development in the rail corridor would undermine the basis for the substantial investment already committed and would weaken the case for future public transport investment. In other words, policies on densities must support the planned growth and support infrastructure must be put in place. It is critical that the land use policies set out in this Update are carried through into the development plans of the local authorities and are translated into action on the ground. The phased approach will give priority to growth along the rail corridors, will be implemented as part of development plans and planning decisions, and will be monitored by the CASP Steering Committee.

It should be recognised that there are significant constraints on accommodating the very significant increase in population for CASP targeted under the National Spatial Strategy if the current trends in relation to the use of the private car continues. While the specific spatial strategy proposed is designed to minimise these impacts by realigning the spatial strategy with the original CASP plan and by concentrating population and employment growth where feasible on public transport corridors, the future demand for transport must be met in a balanced way between all transport modes so that congestion can be reduced. This has implications for investing in and promoting public transport and for other measures to shifting modal shares.

Some of these issues including the feasibility of new rapid transport corridors are subject to more detailed feasibility studies and will also be influenced by the availability of funding. While the spatial option proposed is deemed to be the most appropriate given the constraints, this may need to be reviewed subsequently in light of studies particularly in relation to Tranche 3.

Phasing of the Plan

A summary of the envisaged updated phasing of the CASP is set out below in terms of the tranches pertaining to household formation. For indicative purposes the phasing is time linked as was the case in the original CASP.

However the timescales for population and household should respond to the delivery of economic and employment growth and may need to be revisited. Tranche flexibility is therefore required and an additional tranche may merit review depending on the speed of the economic development.

Phasing Programme for Housing - Updated CASP Projections

Area	Current No. Households (2006)	Updated 2020 projection	Additional No. of Households Proposed	
			Tranche 2 (2007-2013)	Tranche 3 (2014-2020)
Cork City	43,971	62,241	6,396	11,874
Rest of Metropolitan Cork	50,889	89,726	18,906	19,931
Ring Towns and Rural Areas	35,788	50,525	7,230	7,507
CASP Total	130,648	202,492	32,532	39,312

Source: Indecon/RPS analysis

The table below indicates the updated projections for the distribution of job creation within the CASP area. The enhanced economic and investment strategy is designed to deliver a major uplift in economic growth and consequent employment generation within the study area, amounting to an estimated 45,000 new jobs over the remainder of the period to 2020, compared with the 2006 position.

Within the study area, the original CASP projection for 2020 for employment in the City of 81,560 should be increased to 90,691 from its current level of 75,248. The employment projection for the Rest of Metropolitan Cork should be increased from 78,750 to 82,053 and the projection for Ring Towns and Rural areas, including Mallow, should be set at around 43,000.

Future Employment - Updated CASP Projections

Area	Original 2020 Projections - Jobs	Updated 2020 Projections - Total Jobs	2006 Actual Jobs	Increase over Original CASP 2020 Forecasts	Projected Additional Jobs 2006 to 2020
City	81,560	90,691*	75,248	+9,131	+15,443
Rest of Metropolitan Cork	78,750	82,053	61,457	+3,303	+20,596
Ring Towns & Rural Areas	41,060	43,186	34,204	+2,126	+8,982

Source: Indecon/RPS analysis

*Administrative City.

The actual level of employment in each area in 2020 (while facilitated by planning and other policies) will be largely determined by economic and market forces and by the commercial decisions of new investors and the viability of existing businesses and other employers. It will also be influenced by the mix of economic activity with higher skilled, higher income activity being somewhat less employment intensive. The long term employment projections for the CASP and for different parts of the CASP are therefore employment projections and not targets as such.

The projections also reflect the fact that our strategy envisages a re-structured economy for the City, with a choice of locations for an array of employment types.

In considering the updated CASP Plan, it is important to review the detailed projections for sub areas as proposed in the realigned spatial plan. In the table below the updated projections for areas within Cork City are presented.

Projections for Cork City Reflecting Proposed Redesigned Spatial Plan

	Updated Population Projections 2020	Updated Household Projections for 2020	Updated Employment Projections 2020
	Number	Number	Number
Central Cork	11,283	4,682	24,978
Northeast Cork	24,084	9,993	8,828
Northwest Cork	30,218	12,539	12,580
Southwest Cork	39,390	16,344	22,818
Southeast Cork	45,025	18,683	21,487
Cork City	150,000	62,241	90,691

Source: Indecon & RPS analysis

In the tables below the revised population and household projections for the rest of Metropolitan Cork are presented.

Projections for Rest of Metropolitan Cork Reflecting Proposed Spatial Plan

	Updated Population Projections 2020	Updated Household Projections for 2020
	Number	Number
Ballincollig and its Hinterland	33,330	13,830
Ballyvolane	13,495	5,596
Blarney and Hinterland	23,793	9,873
Carrigaline and Ringaskiddy	14,280	5,926
Carrigtwohill and Midleton Hinterland	20,303	8,426
Cobh Town	16,370	6,792
Crosshaven/Myrtleville	4,010	1,664
Douglas/South City Environs	30,102	12,490
Carrigaline Hinterland	4,184	1,736
Glanmire / Riverstown	5,862	2,434
Glounthaune and Little Island	6,883	2,856
Midleton Town	23,429	9,722
Monard/Rathpeacon/Whitechurch	11,153	4,628
Monkstown and Passage West	5,740	2,382
Whitegate/Aghada	3,306	1,371
Rest of Metropolitan Cork	216,240	89,726

Source: Indecon & RPS analysis

An analysis of updated projections for employment for rest of Metropolitan Cork is outlined below.

Employment Projections for Rest of Metropolitan Cork Reflecting Proposed Spatial Plan

	Updated Employment Projections for 2020
	Number
Ballincollig and its Hinterland	12,800
Ballyvolane & Glanmire/Riverstown	5,660
Blarney and Hinterland	7,457
Carrigaline and Ringaskiddy	10,316
Glounthaune/ Little Island /Carrigtwohill/Midleton Hinterland	14,934
Cobh Town	4,380
Crosshaven/Myrtleville	526
Douglas/South City Environs	14,734
Midleton Town	6,202
Whitegate/Aghada	2,743
Monard/Rathpeacon/Whitechurch	1,394
Monkstown/Passage West	906
Rest of Metropolitan Cork	82,053

Source: Indecon & RPS analysis

The proposed updated spatial and land use plan projections for the Ring Towns and Rural Areas is presented below.

Projections for Ring Towns & Rural Areas Reflecting Proposed Spatial Plan			
	Updated Population Projections 2020	Updated Household Projections 2020	Updated Employment Projections 2020
	Number	Number	Number
Bandon Town	9,460	3,925	4,785
Bandon Hinterland	11,402	4,731	3,530
Macroom Town	5,080	2,108	2,337
Macroom Hinterland	9,798	4,068	2,518
Mallow Town	20,000	8,299	8,895
Mallow Hinterland	10,891	4,520	3,188
Fermoy Town	9,410	3,904	4,468
Fermoy Hinterland	12,577	5,218	3,958
Youghal Town	9,650	4,004	3,360
Youghal Hinterland	10,931	4,536	2,506
Kinsale Town	6,147	2,551	2,308
Kinsale Hinterland	6,414	2,661	1,333
Ring Towns and Rural Areas	121,760	50,525	43,186

Source: Indecon & RPS analysis

Refocusing of Economic and Investment Strategy

As part of this CASP update, for the first time new empirical evidence for the CASP area has been assembled on three key issues (and are included in background supporting topic papers), namely (i) the level of skills in CASP; (ii) the sectoral performance of IDA (Ireland) and Enterprise Ireland supported companies in CASP and (iii) the Irish economy expenditures of firms based in CASP.

These provide important building blocks for the development of an effective economic and investment strategy for the area. While a number of broad economic sectoral options were considered, the fundamental economic challenge for CASP is to widen and up-skill its economic base. Enhancing infrastructure and competitiveness is essential.

The analysis undertaken as part of the background to this update provides a rigorous examination of employment requirement for CASP which require adjustments to the original targets in CASP. Of more significance is the fact that a much more detailed sectoral breakdown of areas of opportunity have been identified. Areas of potential include nationally and regionally focused market-based services, internationally traded services and health and education. There is also potential for some expansion in employment in chemicals and pharmaceutical-related sectors including bio-pharma and life sciences, in ICT and the digital sector but these are likely to be more modest.

The core element of the proposed revised economic strategy is to place more emphasis on sectoral areas of potential and on the measures required to realise this potential. These measures include strategies to facilitate a more diversified economic base, a focus on cost competitiveness and productivity and choice of investment locations, a significantly expanded labour market and skills strategy and a specific targeted plan to develop the Docklands.

Based on the detailed analysis of developments both in the CASP area and at national level undertaken as part of this update, it is considered that there is significant scope for job growth in the traded services sectors. The strategy also supports the ongoing development of CASP as an internationally attractive cluster of bio-pharma and ICT sectors as envisaged in CASP. In addition to these 'clusters', the updated strategy proposes a wider focus on other sectors including the services sector. Most employment growth will be in the services sector, broadly defined. The main areas of potential growth include the following:

- ❑ Internationally-traded services, including business services, software, financial, and a range of back-office functions;
- ❑ Nationally -traded services, including areas such as head office activities for Irish corporates and health, education, consumer services and business services.

The table below sets out an indicative sectoral breakdown of the level of employment generation implicit in the updated proposed strategy.

Sectoral Breakdown of Employment in Proposed Updated CASP - 2006 - 2020

Industry	Actual 2006	Forecast 2020	Change in Jobs (+)
Industry	47,513	54,431	6,918
Non-Market Services	36,916	42,364	5,448
Market Services	70,415	100,667	30,253
Other	16,066	18,467	2,402
Total	170,909	215,930	45,021

Source: Indecon & RPS analysis

An estimate of required floorspace and land requirements to meet the needs of updated strategy is presented in the table below.

Employment: Indicative Built area and Land use requirements 2006-2020*

Type	Indicative Jobs	Indicative Floorspace m ²	Indicative Site Coverage	Ave. height (storeys)	Land Requirement (ha)
Office	16,085 (35.7%)	514,720	40%	3	42.89
Business Technology	9,087 (20.2%)	290,784	25%	2	58.16
Distribution	2,698 (6%)	134,900	20%	1	67.45
Industry	6,918 (15.4%)	235,212	20%	1	117.61
Total	34,788	1,175,616			286.11

Source: Indecon & RPS analysis

Note: * This table represents an update of Table 6.4 of the original CASP 2001. It is based on the projected net increase of 45,021 jobs. Office is defined as general offices, headquarters, and back-offices. Business/technology includes, business-to business services, and R&D activities; distribution includes distribution, warehousing and storage; industry includes large-scale stand alone industry as well as small and medium scale production, and office-based industry. Office floorspace is based on a factor ranging from 20m²/job to 34m²/job and this also applies to business/technology floor space. The range is indicative only and reflects the different levels of occupancy rates that can arise in the market. Distribution floorspace is based on 50m²/job; and industry floorspace is based on 34m²/job. These jobs to floorspace ratios are assumptions in the context of estimating appropriate land supply and therefore the floorspace and resultant land requirement figures are indicative only. Flexibility is required in their application, and they should not be seen as a cap. The actual delivery of floorspace and the resultant land requirement will be determined by economic and employment growth. The remaining jobs are retail/commercial/local services jobs, which we estimate to be 10,224, or 22.7% for the CASP area – an indicative floorspace allocation for retail/commercial/local services is not included in the floorspace calculations in this table.

Strategic Employment Locations

All settlements in CASP will attract investment and employment and develop the range and extent of services to facilitate projected population growth. However, there are particular locations which should become the focus for most of the additional projected employment growth, which are referred to as strategic employment locations. Strategic employment locations are those locations, either existing or new, which have the capacity to accommodate additional employment growth, located on an existing or potential public transport corridor, close to, or readily accessible by, existing and expanding population centres. These locations also have the benefit of existing infrastructure, both hard and soft.

The focus is primarily on the expansion of existing key employment locations to accommodate additional growth, including the City Centre, Docklands (North and South), Blackpool, Kilbarry, Mahon, Eastgate/Little Island, Ringaskiddy, Airport/Airport Business Park, Whitegate/Aghada, Carrigtwohill and Mallow.

New strategic employment locations to satisfy the projected increase in market and non-market services in the CASP region are identified at Tivoli, Tramore Road (South Ring Road), Ballincollig, and Curraheen.

In addition to these strategic employment locations, Douglas offers an employment location with brownfield development potential

The overall emphasis is on the provision of a choice of locations for investors. The initial focus will be to concentrate on the expansion of existing strategic employment locations, while at the same time to put in place the mechanisms to secure the provision of new strategic employment locations, so that they can be brought forward for development to meet market demand.

Front-Loading of Infrastructure and Co-ordinated Transport Plans

In the context of the review of progress to date, it is clear that, despite some notable achievements, there has not been the required step-change in the modal transport shares or the reduction in levels of commuting and congestion. The transportation plans must also be supported by the spatial strategy. This is particularly important given that the existing CASP traffic model suggests that by around 2010, roads all around the City Centre will be at capacity in the peak hour suggesting that there is a little spare capacity available going forward in terms of peak hour traffic using routes into the City Centre. However, the Government's NSS spatial targets envisage significant additional population for CASP. To accommodate this, in addition to a refocusing of the spatial strategy, two key challenges will be the front-loading of investment and the implementation of the integrated transport plans.

Creation of an Integrated Transport System

The creation of an integrated transport system is proposed based upon 'state of the art' public transport facilities and a well managed roads system which are central to improving mobility, accessibility and connectivity. This is evident in successful cities internationally. This system should be based on the concept of "total journey quality" for non car users, and will comprise the development of an integrated rapid transit network including the upgrade of the N28, upgrade of the suburban rail network (including the reopening of former route to Carrigtwohill and Midleton), potential improvements to rapid transit corridors for the Metropolitan area and a high quality bus network, both supported by Park and Ride facilities and improved cycle and pedestrian networks. These will offer fast, frequent services linking the City Centre at Kent Station with Metropolitan Cork and the Ring Towns. The strategy also proposes the construction of essential strategic road links, and builds upon existing commitments to improve the road network.

Building on the success of the implementation of the CASP Strategy to date, this Update identifies the need to focus on the continued delivery and implementation of the key transport infrastructural measures and a renewed and strengthened emphasis on the means of implementation and operation of the transport system in addition to a continuing priority to completion by the NRA of the major inter urban routes.

Major Transport Infrastructure Proposals include:

- Recognition that the eastern section of the North Ring Road is extremely important and will be put in place as part of the Atlantic Corridor. There is also likely to be a requirement for one or more appropriate interchanges and associated strategic access links and this will be informed by the NRA's interchange review which is currently under way;
- N25 Sarsfield Road/Bandon Road interchanges;
- Construction of the N28 Ringaskiddy Port Access Route to improve access to the proposed new port facilities including a container terminal at Ringaskiddy;
- New suburban rail services between Mallow, Blarney and Carrigtwohill & Midleton and Cobh via the City Centre;
- Redevelopment of Kent station;
- A strengthened Green routes network building on the success of the routes delivered to date, featuring quality bus corridors;
- A strengthened and expanded City and suburban bus network;
- Park and Ride facilities linked to the new rail services, rapid transit corridors and quality bus corridors.
- High quality public transport and infrastructure for the Docklands development area including a rapid transit route and the Eastern Gateway bridge;
- Continued improvements to the accessibility and connectivity of the Airport by all modes of transport;
- The development of new container terminal and other port related facilities at Ringaskiddy.

A recent decision by An Bord Pleanála, relating to a proposed container terminal at Ringaskiddy, has identified concerns regarding traffic impact at key locations on the road network and the lack of potential for the future transport of freight by rail in the Ringaskiddy area. The maintenance of modern port facilities and the need to release port related land in the Docklands and at Tivoli for mixed-use development formats are both critical to the overall strategy for the sustainable development of the CASP area and to the achievement of the target populations for the City.

The Planning Authorities in conjunction with the Port of Cork will need to carefully assess the issues raised by An Bord Pleanála in relation to Ringaskiddy regarding the scale and nature of future port development and possible alternatives.

The Western link of the North Ring Road between the N20 and the N22 is also important but it is accepted that this has a larger timeframe but should follow the delivery of the eastern section.

In addition there may be potential for one or more rapid transport corridors and two potential routes have been identified for further examination namely:

- A rapid transit corridor linking key development nodes at Mahon and the Docklands with Kent Station, the City Centre and the western suburbs including the University, CUH and CIT with possible westward extension to Ballincollig;
- A second rapid transit corridor linking the Airport with the City Centre and linking onwards to the new development node at Ballyvolane.

It should, however, be noted that the economic case for the development of rapid transport corridors is very dependent upon having sufficiently high population densities close to potential routes to support frequent high volume services. A separate detailed feasibility on potential rapid transit corridors is being commissioned by Cork City Council and the potential corridors identified are subject to this proposed feasibility review. It is also important to note that there are varying levels of service which may be appropriate on any corridor ranging from green route/quality bus corridor to bus rapid transit and light rail transit.

It is important to outline the timelines to which the detailed feasibility study into rapid transport routes will be completed. The targeted date for completion is end-October/November 2008. The findings of this will feed into Government investment decisions and into the on-going planning of transport by the public authorities. This may involve adjustment to the implementation of the detailed CASP Transport Plans as presented in this Update.

The detailed feasibility study being undertaken by Cork City Council will determine the nature, location and extent of any proposed rapid transit corridor proposed in this Updated CASP Strategy.

It is recognised that public transport has to be targeted as the key transportation mode to service anticipated growth in the CASP area. The ambitious targets for population growth for CASP, which have been set by Government as part of its National Spatial Strategy, will have implications for traffic movement. However, the Updated CASP Strategy is focused on the delivery of additional population in close proximity to the City and on the rail corridor, along existing or potential public transport corridors, minimising as far as practical the impact of car borne commuters on the National Road Network.

The updated Strategy gives a high priority to a concerted effort to identify and develop opportunities for delivering strengthened public transport choice through a combination of new public transport routes/infrastructure and other appropriate measures.

In considering plans for public transport it is important to ensure that this includes providing an efficient transport system to facilitate the movement of students to key hubs including at UCC, CUH and CIT. This is also important in enabling transport infrastructure to meet the needs of the expanded skill base proposed for CASP.

The development of the public transport corridors should be provided as early as possible as high density development in areas such as the Docklands is predicated on the provision of public transport.

Major supporting policy and active management initiatives that are required to deliver the integrated transport system include:

- The integration of planning design and operation of transport services, infrastructure and facilities;
- The Integration of Transport Management Systems including development of the Cork Mobility Management Centre and associated ITS infrastructure
- An integrated parking policy between City and County;
- Local access infrastructure packages for all key public transport nodes including stations and key interchange points;
- Local area transport plans which identify measures (hard and soft) to support the achievement of the CASP goals in the local area;
- Emphasis on the provision and monitoring of modal choice in the development control system;
- Effective implementation of supportive land use policies in the CASP area
- A Strategic Review of the City and Suburban Bus Network.

Given the challenge of accommodating the targeted increase in population the following items need to be included in any renewed transport approach for the region:

- The use of incentivised school transport services
- The use of flexible urban transport services.

In considering the transportation plans for Cork account should also be taken of the potential for initiatives to facilitate increased cycling and pedestrian travel. Improved cycle and pedestrian networks should form an integrated part of the transport system and this is particularly relevant given the compact nature of Cork City.

Cork City has a relatively high modal share for walking and cycling compared to other cities, reflecting the historical compact layout and form of the city. Census data however has shown that bicycle use as mode of transport to work school or college is declining. The provision of cycle networks and facilities is supported by the policy documents of both City and County and the City Council have identified a city cycle network and dedicated resources has been allocated to the implementation of cycling pedestrian and other soft measures.

As part of the programme to promote public transport and reduce car dependency, the proposed Green Routes network will be promoted as safe and accessible for cyclists. A cycling initiative will address the decline in cycling, in partnership with organisations with an interest in the promotion of cycling both for local transport, and for leisure/tourism. The approach will promote the use of the improved infrastructure to be offered by the Green Routes, greater integration with public transport, education/training and marketing. Bicycle parking will be provided on this network, and at key destinations in the City centre and towns. Within their Commuter Plans (or Mobility Management Plans), major employers will provide measures to ensure safe access to the work place by bicycle and will provide secure bicycle parking/ storage. Development Control policies to reflect this through planning conditions will be applied. Cycling is cost-effective, non-polluting, reduces congestion in urban areas, fosters improved health, and is accessible to young people.

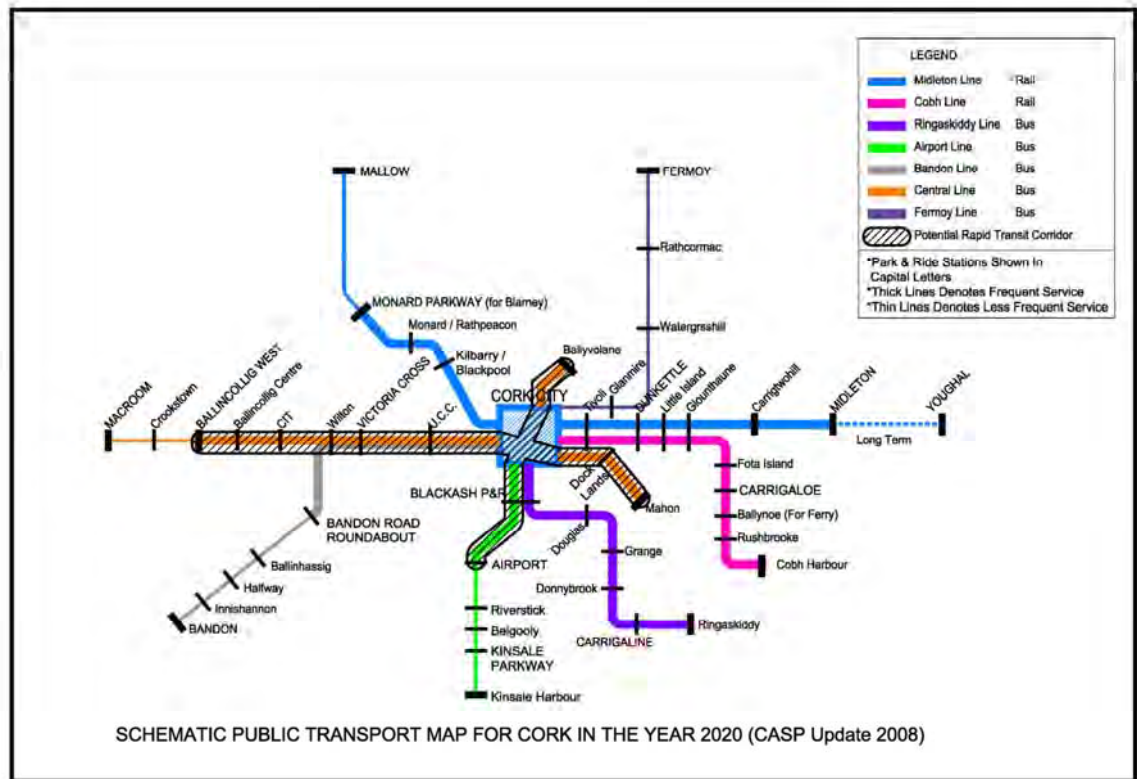
Walking is cost-effective, healthy, non-polluting and reduces congestion. Most trips, even by car, have a walking component. As an activity in its own right, walking improves residents and visitors enjoyment of both the City and the countryside. Enhancement of the pedestrian environment is a cornerstone of any successful urban renewal initiative. Initiatives such as the Safe Routes to Schools project should be introduced throughout the Study Area in conjunction with the Department of Education and local schools.

A central part of the Integrated Transport System philosophy is the improvement of access and accessibility for all. The provision of suitable facilities for all transport users, whatever their physical ability will be mainstreamed within the planning design and operation of all transport services, particularly where these issues may not have been given prominence previously.

Waterbuses and ferries will be also encouraged as part of the CASP Update.

In the figure overleaf a schematic presentation of the public transport map for Cork to reflect the updated strategy is presented.

Schematic Public Transport Map for Cork in the Year 2020



Source: RPS GIS Mapping

As noted above, in considering the spatial option as part of the Update of CASP, it is essential to adopt a realistic and policy driven economic strategy and to ensure that the recommended strategy is supported by adequate infrastructure. A summary of some of the key infrastructural requirements have been presented in the Update. The prioritisation of projects is indicated in a table in the appendix, as well as indicative costings for these projects where the information is available. In some cases, detailed costings require further analysis. For example, in relation to the rapid transit corridors estimates of costs and funding will form part of the feasibility study which is underway. The costs of some of the national road projects and possible interchanges will be evaluated. The main source of funding for the infrastructure projects will be the NDP, the current and future rounds of the Gateway Innovation Fund (GIF) and Local Authority Development Contributions. There is also some potential for PPP financing.

There is also potential for private sector funding for certain projects although public sector infrastructural support will be required. One of the priority tasks for the CASP implementation team will be to secure funding for the critical strategic infrastructure.

It is essential that the CASP implementation teams work to ensure that the infrastructure is developed. This is necessary as the CASP update should form the basis of a working business plan that provides the template for ensuring Cork's continued growth and prosperity well into the future.

If it emerges that funding for required infrastructure is not available this will need to be reflected in adjustments to the Strategy and would impact on the ability of CASP to deliver the National Spatial Strategy population targets.

Specific Initiatives to develop the Docklands

The Docklands represents a key area of potential for the City and the wider CASP region. There are various plans to achieve an integrated, vibrant, mixed-use development in the area. The challenge is to implement these plans and to put in place the necessary key development mechanisms. There will be a need for public intervention in terms of infrastructure, sectoral prioritisation and public sector funded activities or incentives to spur development in the area. Effective structures to support this development will also be needed.

Key sectors of potential in the Docklands include the following:

- National Market Based Services
- Internationally Traded Services/Mobile Services
- Health and education
- Bio Pharma/Pharmaceuticals, Medical Devices and Life Science Sectors
- ICT and Digital Media.

It should be noted that the Docklands is an ambitious project but one which the City and CASP needs to be successful. The focus will need to be on high value services end facilities with companies that want to be part of a new business district in a City and are prepared to commit to significant volumes of space. The importance of certainty on the cost and deliverability of infrastructure to the Docklands area is also emphasised in this updated CASP plan.

In addition, there is a need for the front-loading of infrastructure to support the development of the Docklands. The Docklands Local Area Plan sets out a programme of infrastructure requirements for the delivery of the plan. This should be prioritised in the short-term to support the development of the Docklands. The key transport elements are:

- The Eastern Gateway bridge;
- Bridge at Water Street;
- Public transport bridge at Mill Road;
- Local roads infrastructure;

- ❑ The provision of a rapid transit link with the City Centre, Mahon and the western suburbs.

The major focus on developing the Docklands while also facilitating certain types of development elsewhere in Cork City and other parts of CASP, reflects the fact that the city centre/Docklands market is different to what is being produced and should be developed in the suburban market. There are different sectoral characteristics and requirements and there is also a significant difference between the cost in the City Docklands environment as opposed to the suburban environment. However, there is greater opportunity for choice as regards development within the Docklands relative to that available in other locations. There are two distinct markets in terms of office space and for some sectors price is a significant factor in terms of general office use and office based economic activity.

The development of Docklands is key to the regeneration of the City. Lessons for comparator cities who have successfully developed their Docklands indicates that this can lead to the provision of high density, high quality residential units, endowed with attractive features such as promenades, walkways and water front developments.

Implementation of Labour Force and Skills Strategy

A new focus of this updated CASP strategy is the inclusion of a labour force and skills strategy. To facilitate the achievement of the proposed economic and investment development strategy for the CASP region it will be necessary to complement this strategy with supporting labour and skills strategy. The role of skill development linked with educational institutions is evident in successful selected comparator cities. An effective labour and skills strategy must deliver the following key outcomes:

- ❑ Attraction of additional high skilled employees to the area;
- ❑ The need to increase participation in the workforce and enhance labour supply in line with targeted growth in the population of the CASP area;
- ❑ The provision of skills required to support the targeted growth in employment and to maximise the attractiveness of the CASP area for potential investors;
- ❑ The delivery of specialist skills to reflect the increased demand for specific skill sets commensurate with the sectoral profile of employment generation going forward in the CASP area; and
- ❑ The need to address issues of low educational attainment in parts of the CASP area.

If CASP is to realise its economic development goals, there will be a need to enhance the overall supply of specialist skills in line with the targeted increase in population and the mix of skills to reflect the evolving structure of economic activity and employment going forward. While a comprehensive assessment of skill requirements for CASP is beyond the scope of this update exercise and should be undertaken subsequently by the CASP implementation team, as part of the Update, significant new analyses on existing skills and the implications of the proposed economic development strategy in terms of the linkage with the projected labour force in CASP has been undertaken. An alignment of third and fourth level education to support the targeted expansion in business, financial and other services is required. This assessment of skills should be undertaken in conjunction with FAS / EI / IDA Ireland and with key educational institutions. A summary of indicative skill requirements is presented below.

Education/Skills Requirements – Base Case Scenario for Educational Attainment Levels – Key Assumptions

Proportion of Labour Force by Educational Attainment Category and Region	2006 Proportion	2020 Target
	<i>% Total</i>	<i>% Labour Force</i>
<i>NFQ levels 1-3/Primary Education only</i>		
CASP	14.8	3.8
<i>NFQ levels 4-5/Lower-Upper Secondary only</i>		
CASP	49.3	46.0
<i>NFQ levels 6-10 Third level/Degree or higher</i>		
CASP	31.7	50.6

Source: Indecon analysis

Other Initiatives

In addition to the core elements of the proposed updated plan, there are a range of other supporting strategies which are required.

Business/Science Parks

The availability of a choice of a sufficient amount of business space is critical to competitiveness of the region. There is a need for additional business park related development in both the City and County areas. This would include the scope for significant intensification in existing business and technology locations including at Mahon. This would follow on from Eastgate, Airport Business Park and Euro Business Park. There is potential for some expansion in existing areas and a number of these are coming to the end of their development cycle.

There is a need to intensify linkages between the research community and industry in CASP to address the low ratio of R+D in certain areas. In addition to action by educational and research communities working with business, this will require the availability of sufficient land and appropriate space including a science park.

Ideally, a proposed science park should be located close to third level institutions as a specialist centre for R+D and technical innovation activities, modeled on best international practice in regard to the special role of such parks. There may be, however, a danger of restricting use to one specific activity as could apply to a narrow interpretation of a science park.

This proposed new science park should be located close to the city and one option identified for this is at Curraheen. It is also appropriate that R+D activities are included as part of the Docklands development.

Housing and Other Policies

Effective housing strategies are also an important element of the proposed updated economic development strategy. Providing a good mix of housing and implementing measures to address areas of social deprivation is important. This is a priority if the population decline in Cork City is to be reversed and social inclusion is to be promoted, and if the CASP region as a whole is to be attractive as a location for residents and investors.

A review of comparator cities undertaken as part of the CASP Update highlighted the fact that overall housing market renewal-based approaches aimed at delivering physical social and economic regeneration are key elements in addressing deprivation. Policies to counter urban deprivation however, must also be designed to tackle problems of unemployment, low-skill levels, crime, education and health. Projects involving a joint-venture partnership type approach can in some cases be effective. Alongside housing schemes, successful approaches must be complemented with initiatives to encourage new businesses and investment. A number of issues which are important in tackling urban deprivation include the following;

- ❑ *Developing a long-term investment strategy* to tackle deprivation.
- ❑ Continually striving to *attract new resources* to ensure the implementation of all projects,
- ❑ Co-ordinating initiatives across all different areas,
- ❑ Facilitating local communities to help drive their own development.

Long-term integrated city planning in terms of housing, architecture and overall visual changes in a city plays a vital role in shaping the future competitiveness of a city region. Among key implications are as follows:

- ❑ Need to tackle areas of low quality housing in a fundamental and radical manner;
- ❑ Importance of integration of physical planning and transportation;
- ❑ Role which high quality architecture can play in establishing the image and

attractiveness of CASP.

Supporting policy initiatives also will require investment in arts, cultural and other social infrastructure to enhance the quality of life of residents and employees in CASP.

Implementing the Strategic Plan and How to Achieve the Targets Set

It is essential that there is a sufficiently empowered implementation system responsible for driving forward the objectives of CASP. Implementation needs to take account of the fact that CASP requires not only effective spatial planning integration, but also co-ordinated policies on employment, transport, education and infrastructure. The key is to ensure that the City and its Metropolitan area are developed as a single unit, in order to ensure that CASP becomes a real driver of the economy. A clear mechanism for implementing the strategy has been specified to ensure the objective of enhancing the economic performance of CASP will be achieved. For this reason, the updated CASP Strategy has focused not only on developing the appropriate Strategy, but on outlining clear mechanisms for implementation and on how to achieve the targets set. These are outlined in more detail below.

It is critical as part of implementation that the proposed phasing of development is adhered to, that planning decisions are consistent with the policies agreed in the CASP update, and that effective monitoring arrangements are in place to give early warning of unsustainable trends. The CASP Plan and phasing is dependent on implementation of all the CASP Update proposals. Front-loading of infrastructure also is essential to implementation of the phasing proposed.

As part of the implementation plan, a key first task is for the CASP Steering Committee is to assign ownership of specific issues to individual organisations who have a regional representation within the areas relevant to CASP, such as employment growth, skills strategy, transport planning, place marketing etc. This would include formal recognition of the role of the CASP collective partners beyond that of the local authorities, as CASP cannot be implemented by the local authorities on their own.

There is a need for Cork to speak with one voice on CASP issues and the need to identify mechanisms to strengthen co-operation between the relevant stakeholders is a critical output of the CASP Update.

The prioritisation of development based on sustainability is reflected in the phasing, whereby growth will be first directed along the rail line and in the City and Docklands.

The proposed update of CASP requires action in a number of key areas including spatial and land use planning, economic and investment strategy, infrastructure and transportation, Docklands development and labour force skills. The key to success lies in the structures and processes adopted to implement the various elements of the

Strategy. It also requires national support in addition to initiatives within CASP. A number of issues will be critical to the successful implementation of this update strategy including the overall CASP governance structures, the effective marketing of the CASP area, funding availability and an appropriate monitoring framework.

Structures were put in place to oversee the coordination and implementation of the Strategy - including the CASP Office. These exhibit a number of innovative features and much has been achieved within a short period. However, building on the experience and progress made to date, there is now a need to significantly upgrade and enhance the structures if the ambitious targets for the Strategy are to be met. A key requirement is to put in place nominated CASP-specific teams in both the City and County Councils, dealing with the core aspects of economic development, transport and land-use issues. Additional high quality professional skills in economic development will be needed to ensure strategies take account of economic and market realities. It is proposed that the officials dealing with economic development, land use and transportation would be attached to their respective local authority, but would be focused on CASP implementation. These need to be supported by sub-committees of the CASP Steering Committee. These sub-committees would be co-ordinated and serviced by the CASP Office. Some additional staff may need to be allocated to the CASP Office to service this updated implementation framework, although it is proposed that most of the expanded dedicated specialist resources would be within the two local authorities.

The preparation of local area plans remains an important tool in the implementation of the Strategy. This will be of particular importance in areas where a substantial level of development is envisaged in order to ensure that the required services are put in place at the appropriate juncture.

There is a strong need for partnership between the City and County authorities in delivering on CASP. The City and County have worked well together in developing Joint Retail and Housing Strategies. The CASP update will require continuing coordination to deliver the new development areas that cross the city /county boundaries and to secure the new transport strategy, including public transport, parking strategy, roads infrastructure etc, as well as ensuring that planning policies are compatible with CASP. A 'working partnership' involving close cooperation between the two local authorities is proposed.

The original CASP Strategy placed particular emphasis on the need for effective marketing of the Cork area. While a number of initiatives have been put in place, there is merit in a more developed initiative to market the Cork area.

The NDP indicates a strong commitment to addressing a number of key CASP investment priorities over the 2007 to 2013 period. The challenge is to secure the required level of funding for the front loading of key CASP infrastructure projects.

In considering how the updated CASP strategy will be achieved there are three aspects which merit particular attention as follows:

- Setting of Targets
- Monitoring Framework
- Institutional Processes.

Setting of Targets

The setting of clear population and employment targets for monitoring particularly in terms of the proposed spatial planning is a necessary but not sufficient component of ensuring the strategy is achieved but without these targets it is not possible to ensure that the direction of the strategy is achievable. The emerging issue of growth in the hinterlands of the Ring Towns is recognised. The realignment of CASP as outlined in this updated strategy points to the need to respond to this issue through policy development in the development plans and through subsequent development management.

Monitoring Frameworks

An important and innovative feature of the CASP Strategy was the articulation of a detailed monitoring framework with the inclusion of a set of accompanying indicators. However, because of difficulties with a number of the selected indicators in terms of general clarity and data availability, it would appear that the CASP indicator framework has not been utilised fully in the ongoing CASP monitoring process. With a view to addressing these difficulties, a more streamlined monitoring framework is proposed, including new monitoring indicators. As part of the CASP implementation there is a commitment to monitoring development in the Villages and Rural areas of the CASP ring, with a view to securing adherence to the broader CASP Strategy.

Institutional Processes

The key mechanism which will be used to ensure the updated CASP Strategy is delivered will be the alignment of the strategy with the City and County Development Plans for the two local authorities.

The City Development Plan and the County Development Plan are the key policy documents which will have a direct impact on the achievement of the updated CASP Balanced Spatial Development Goal and ensuring a concentrated rather than a dispersed population settlement. Ensuring an alignment between these plans and the updated CASP strategy is essential to effective implementation. This is also critical in ensuring that the spatial strategy provides the basis for public transport and other infrastructural investment. Once finalised the new County Development Plan and the subsequent City Development Plan needs to be vigorously implemented and where appropriate supported by supplementary development guidance. One issue of concern is that the revised population targets for the hinterland of the ring towns

are already close to being achieved and the local authorities will need to address this issue because of its implications for growth elsewhere.

Conclusions

With effective policy implementation, the updated economic strategy for CASP provides the basis for Cork to develop as a sustainable competitive knowledge intensive city economy region which will attract investment nationally and internationally. The region has many underlying strengths and with effective policies and a commitment to achieving the goals set, the future for the Cork area is promising. There is, however, a challenge for national and local stakeholders to ensure that the building blocks underlying the updated CASP strategy are implemented as a priority.

Acknowledgements and Disclaimer

The consultancy team which were involved in preparing the analysis for this updated plan wish to acknowledge the very valuable inputs and assistance of a wide number of groups and individuals to this paper. In particular, we would like to note the inputs of the members of the CASP Project Group including Mr. Declan Daly (Divisional Manager, Cork County Council & CASP Co-ordinator Cork City/Cork County Council), Mr. Dan Buggy (Assistant City Manager, Cork City Council), Mr. Kevin Terry (Director of Service, Planning and City Engineer), Mr. Ger O'Mahony (Director of Service, Forward Planning & Strategic Development, Cork County Council), Mr. Noel O'Keeffe (Acting County Engineer, Cork County Council), Mr. Andrew Hind (Senior Planner, Planning and Policy Unit, Cork County Council), Mr. Pat Casey (Senior Engineer Roads and Transportation, Cork City Council), Ms. Ann Bogan (Senior Planner, Planning Policy Unit, Cork City Council), and Mr. Dan Looney (CASP Coordinator, Cork County Council). Thanks are also due to Ross Palmer and Peter O'Donoghue and Robert O'Farrell from Cork County Council.

We would also like to acknowledge the guidance given by members of the CASP Steering Committee. The Steering Committee members include: Martin Riordan, County Manager, Cork County Council, Joe Gavin, City Manager, Cork City Council, Martin Doyle, Regional Director, Enterprise Ireland, Pat Keohane, Chief Executive Officer, Cork Airport Authority, Brian Conroy, Director, IDA Ireland, Jerry O'Donoghue, Investment Manager (South), Asset Management ESB Networks, Joe Fitzgerald, Area Manager, Bus Eireann, A.J. Cronin, former District Manager and Andrew Roche, Business Development Executive, Iarnrod Eireann, Brendan Keating, Chief Executive, Port of Cork, Paul Hannon, Public Transport Planning, Department of Transport, John Martin, Principal Planning Advisor, Department of Environment and Local Government, Richard Bowen, Engineer Inspector, NRA, Michael O'Sullivan, Vice President of Planning, Communication and Development, UCC, Michael Noonan, Assistant Principal, CIT, Roger Flack, Director, Cork Chamber of Commerce, John Bowen, Construction Industry Federation and Bowen Construction Ltd.

Thanks are also due to a wide range of organisations with whom we held consultations to-date or who have made submissions, including Cork City Development Board, Cork County Development Board, Cork City Enterprise Board, South Cork Enterprise Board, North Cork Enterprise Board, IDA Ireland, Enterprise Ireland, University College Cork, Cork Institute of Technology, Cork Chamber, Mallow Chamber Cork Airport, Irish Rail, Bus Éireann, National Roads Authority, Cork Docklands Development Forum, Construction Industry Federation, Cork City Council Planning Policy Unit, Cork County Council Planning Policy, Cork City Council Docklands Directorate, Cork Development Forum, Cork Social Housing Forum, Port of Cork, and the South West Regional Authority. Thanks are also due to Professor Gerry Wrixon and to John Travers.

Thanks are also due to the active involvement of Councillors including the CASP

Policy Committee.

We acknowledge the valuable inputs from 253 businesses in Cork who have to date responded to our consultation process. Thanks are due to all other individuals and organisations who made submissions to the consultancy team. These include public submissions made in response to a public notice included in the newspapers and on the web-sites of the two local authorities which provided an open opportunity to make submission to this draft strategy. A summary of submissions made is presented in Annex 3. The extent of engagement and interest to date in the future of Cork and this updated plan by businesses and other organisations is noteworthy.

We would also like to thank in particular Forfás and the CSO who have kindly assisted us in producing for the first time selected new data for the CASP area.

The usual disclaimer applies and the views and analyses are the sole responsibility of Indecon, RPS and Savills HOK.

The views of all stakeholders in Cork and nationally on this important update of CASP have been greatly welcomed and were carefully considered in preparing the final updated plan.

We would like to acknowledge receipt of all 80 submissions received post completion of the Draft. Special thanks are due for detailed commentary received from Cork Chamber, Cork Development Forum, Construction Industry Federation, Docklands Directorate Cork City Council, Cork Marketing Partnership, Department of Transport, National Roads Authority, Port of Cork, Harbour Cat Ferries and Cork Environmental Forum, Great Island Inshore Fisherman's Association, Tesco Ireland, Middleton and Area Chamber, Youghal Chamber of Tourism & Commerce, Passage West Town Council, and Carrigaline Community Association.

1 Introduction and Background

1.1 Background and Context

The Cork Area Strategic Plan (CASP) is a pioneering initiative jointly sponsored by Cork City Council and Cork County Council which provides a vision and strategy for the development of the Cork City-Region up to 2020.

The original CASP sets out a broad brush strategy which aimed to provide guidance as to the general direction and scale of growth which would enable the Cork City-Region to provide a high quality of life and opportunity for all of its citizens over the 20 year period. The CASP strategy appropriately sought to move towards a more sustainable form of development for the Cork City region. In particular, the CASP set out a framework that will enable the Cork City-Region to:

- Attain critical mass;
- Integrate land use and transport;
- Make efficient use of investment in infrastructure;
- Provide a high quality environment;
- Improve the competitiveness and attractiveness of the region.

This draft update of CASP which was prepared with the assistance of Indecon International Economic Consultants, RPS Consultants and Savills HOK, is designed to build on the strengths of Cork and to facilitate Cork to become a leading competitive European city region. It takes account of revisions needed to reflect economic, market and policy developments since CASP was prepared and places particular emphasis on the implementation of policies to achieve the goals of CASP. It also includes an increased focus on the economic and investment strategy.

1.2 The Study Area

The CASP covers an area determined by a journey time of about 45 minutes from Cork City. This area has been defined as the Cork City-Region. Figure 1.1 overleaf presents a pictorial representation of the study area, which covers Cork City and its environs.

A key component of CASP is the concept of Metropolitan Cork. CASP envisaged that the towns and areas in the immediate hinterland of the City of Cork will be redefined as a single integrated unit, known as Metropolitan Cork. This is shown by the lined area. Specifically, Metropolitan Cork consists of:

- ❑ Cork City and Douglas which is part of the Southern Environs of the City;
- ❑ The Satellite towns of Ballincollig, Blarney, Carrigaline, Glanmire, Glounthane, Carrigtwohill, Midleton and Cobh; and
- ❑ The existing strategic employment areas of Little Island, Carrigtwohill, Cork Airport Business Park, Ringaskiddy and Whitegate/Aghada.

CASP envisaged that Metropolitan Cork would be characterised by a single jobs and property market linked together with a high quality rail and bus system and the social, cultural and educational facilities of a major European City.

The Study Area radiates further out to include the areas specified in CASP as the Ring Towns and their rural hinterlands. The following towns comprise this area: Kinsale; Bandon; Macroom; Mallow; Fermoy; and Youghal.

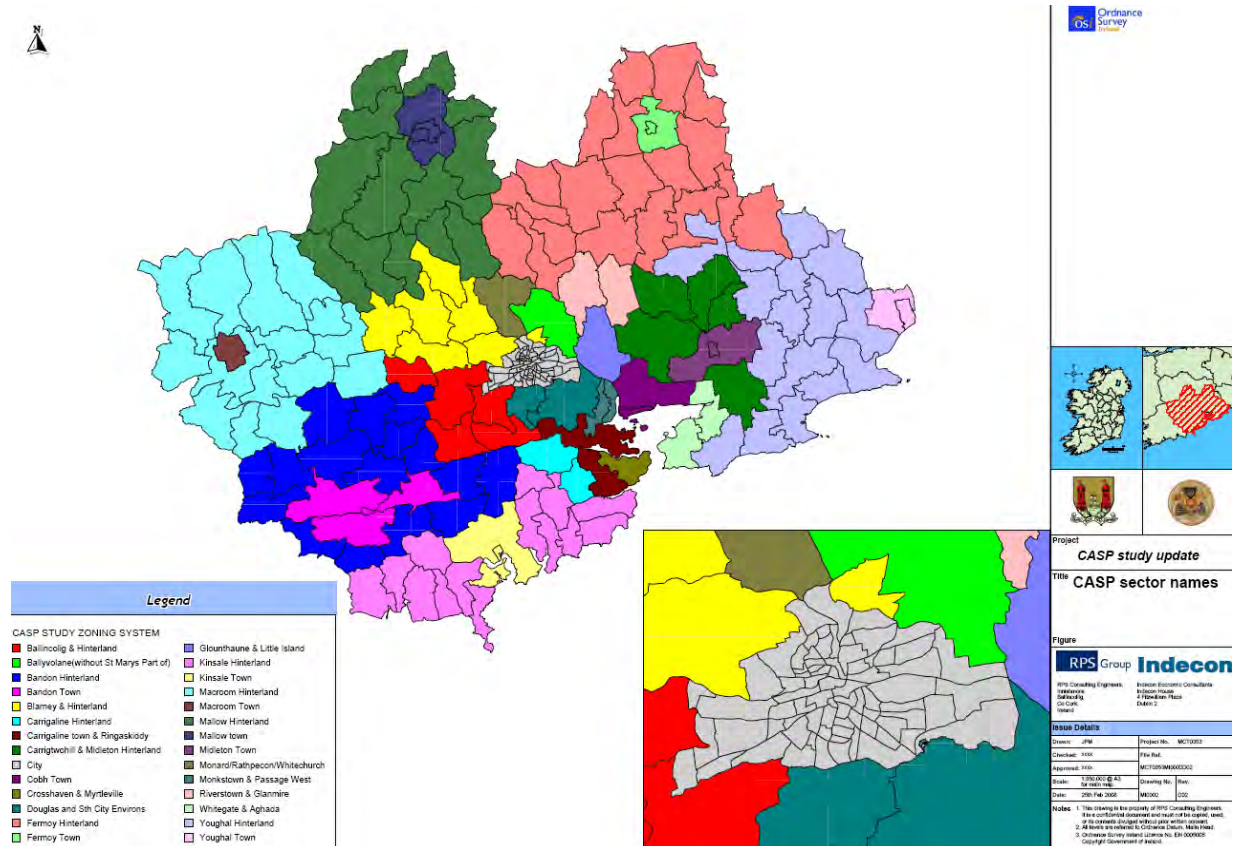
Figure 1.1: Study Area



Source: CASP 2001.

A summary of CASP area zoning system is presented below:

Figure 1.2: CASP area zoning system



Source: RPS GIS Mapping

1.3 Key Development Issues Facing Cork

The CASP strategy identified a number of key development challenges facing Cork which remain central to this Updated Strategy:

➤ **Realising and Managing Economic Growth;**

It was felt that if Cork was to benefit from inward investment, retain existing business and realise its full potential it must safeguard, enhance and promote its outstanding assets of people, environment, and transport infrastructure, together with its industrial and educational establishments. In this update, a new emphasis is placed on skills and on enhancing the promotion and attraction of the key asset of people.

➤ **Regenerating the City;**

The economic, social and cultural regeneration of the City was recognised as crucial to the future success of the entire City Region. The Docklands and City Centre were flagged to play particularly critical roles in this revitalisation, by providing the location for many of the new uses, activities and facilities central to the regeneration process. This updated plan highlights the need to give priority to this objective and to address the decline in population in the City which has occurred to date since CASP was produced and which is not aligned with the CASP objectives.

➤ **Balancing Development in Metropolitan Cork;**

A challenge faced by CASP in this domain was to redress existing imbalances and to facilitate the provision and location of new development and infrastructure investment in a sustainable manner. CASP identified the need to provide more sustainable patterns of development by correcting the growing imbalance between the development of the city and its surrounding suburbs and satellite towns. This requirement is still of key importance and is reflected in the updated strategy.

➤ **Achieving Sustainable Development in the Ring Towns and Rural Areas;**

A key challenge identified was to avoid the development of the Ring Towns as dormitories for Metropolitan Cork and focus more on employment-led growth within these towns themselves. This challenge is of even greater importance now in the light of population settlements to date and addressing the unanticipated extent of growth in rural areas is a focus of this updated strategy.

➤ **Creating an integrated transport system;**

This was concerned with the trend towards excessive car dependency arising from economic growth and associated rising levels of car ownership. The emergence of dispersed development was identified as the major driving factor behind this trend. Unfortunately, to date, these patterns have persisted but action to address this is included in this updated plan.

1.4 Goals and Objectives

Having regard to wider economic and policy developments, including the preparation of the NSS, the CASP strategy was articulated around a series of goals under the following broad strategic areas:

- ❑ Economic growth;
- ❑ Social inclusion;
- ❑ Balanced spatial development;
- ❑ Environment;
- ❑ Urban renewal;
- ❑ Transportation; and
- ❑ Infrastructure, including water, drainage, energy etc.

Each of the original CASP goals and related policy objectives are set out in the table overleaf. In CASP (2001), these were complemented by a set of associated monitoring indicators. Of particular importance were the following headline variables: population, housing and employment. CASP (2001) outlined a number of specific targets in relation to each of these indicators and progress towards the achievement of these CASP goals and related targets is summarised later in this Section. These targets included long-term plus intermediate stages or tranches, which are described overleaf.

The analysis completed as part of this update indicates that the original CASP goals remain valid but that significant refinements to the indicators are required. The most important issue for this update is, however, the fact that the population dispersion, which has occurred since CASP, is not consistent with what was envisaged in CASP and is also not aligned with the CASP goals. A critical issue for the update relates to implementation issues to realign spatial outcomes with these goals.

Table 1.1: CASP Goals and related Policy Objectives

Goal	Policy Objective
<p>(1) Economic Growth Create a highly competitive location so as to facilitate the growth of an innovative and advanced (but balanced and robust) economy.</p>	<p>01. To promote an innovative, advanced, high-value added and high wage economy. 02. To retain a robust, well balanced economic structure. 03. To create an internationally oriented and highly competitive location.</p>
<p>(2) Social Inclusion Promote social inclusion (especially within Metropolitan Cork) by improving access to public transport, education and jobs.</p>	<p>04. To create access to employment opportunities for the most disadvantaged members of the community. 05. To improve access to facilities and services including education, health, community services and utilities.</p>
<p>(3) Environment Enhance the environmental quality and landscape setting of the Cork sub-region, minimise impacts on ecologically sensitive areas and on built heritage and cultural landscapes.</p>	<p>06. To minimise impact on ecologically sensitive areas. 07. To minimise impact to cultural heritage, character, and setting of the City, towns and villages. 08. To improve the sustainable use of resources. 09. To minimise the effects on rural landscape character. 10. To ensure ready access to open space and natural landscape.</p>
<p>(4) Balanced spatial development Include the City, its satellites and rural settlement as part of a balanced settlement system, with all levels of development in accordance with varying economic potential.</p>	<p>11. To deliver equivalent benefits to the entire area. 12. To locate appropriate economic activity in smaller settlements or centres. 13. To avoid excessive routine commuting. 14. To create a polycentric location pattern within Metropolitan Cork.</p>
<p>(5) Urban Renewal Recognise City as the heart of the sub region. Promote a high level of economic activity in the City centre and ensure that the housing stock and urban services retain their attractiveness in general balance with the suburbs. Synthesise urban renewal with conservation of historic form and character.</p>	<p>15. To promote the City centre as the major area of comparison shopping, services and culture in the region. 16. To promote regeneration of the run-down urban areas of the City. 17. To provide high quality public transport to reinforce the role of the City centre.</p>
<p>(6) Transportation Maximise the use of fully accessible public transport by co-coordinating building form, use and density with high quality bus and train services, as well as regulating cars and other traffic. Promote walking by improving the pedestrian environment.</p>	<p>18. To ensure the provision of a well functioning, integrated public transport system. 19. To ensure the provision of a defined standard of the public transport, at reasonable cost. 20. To ensure the timely and cost effective delivery of the accelerated investment in infrastructure. 21. To reduce car dependence.</p>
<p>(7) Infrastructure Minimise the cost of providing water, sewerage, electricity, gas and telecommunications services to the population.</p>	<p>22. To maximise the use of existing infrastructure 23. To minimise the cost of new service provision and operation.</p>

Source: CASP (2001)

1.5 Phasing of CASP

The Cork Area Strategic Plan (2001) was organised around four development tranches corresponding approximately to the following target dates: Tranche 1 (2001-2006), Tranche 2 (2007-2013), Tranche 3 (2014-2020) and Tranche 4 (post-2020). It was intended that each tranche would be self contained, implying that should population growth be slower than anticipated (the low growth scenario) then investments intended to facilitate Tranche 2 would not be made until Tranche 1 was largely completed. Conversely, should demand for housing be higher than expected, i.e., the high growth scenario, development would need to be brought forward. This approach remains valid and is reflected in the updated plan.

The CASP phasing programme was based on the following principles:

- ❑ Each phase of development should create a workable urban environment *even if no further tranches* were to be implemented. This means that the physical form of the development, its layout, mixture of land uses, and its infrastructure and services should be functional and sustainable at the conclusion of each phase and not rely upon the completion of subsequent tranches in order to reach a satisfactory state.
- ❑ In Metropolitan Cork, growth areas should be brought rapidly to a semi-complete state before others are started. This would minimise the length of time during which the population is deprived of services and subject to the inconvenience of construction operations.
- ❑ Within each of the Ring Towns, one development zone should be largely built out before opening up the next.
- ❑ Phasing should also follow a principle of compactness, so as to minimise the spatial spread of development (and the associated journey lengths) at each stage.

Tranche 1

Development identified by CASP as desirable in the first tranche, i.e., the period since CASP was produced, was to be concentrated in areas which:

- ❑ did not need new strategic infrastructure;
- ❑ had already established a superstructure upon which to base expansion;
- ❑ were relatively close to the established centre of gravity;
- ❑ and supported the establishment of Phase 1 of the public transport projects.

Development was envisaged in Cork City, Ballincollig, Douglas and the South City Environs, Cobh, Midleton, Carrigtwohill and Carrigaline during this period. As will be seen later in this section, the pattern of development which occurred involving a decline in population in the City was not aligned with this agreed strategy.

Tranche 1 Plus

The CASP envisaged that the then emerging *National Spatial Strategy* (NSS) would redirect certain high growth employment sectors to Cork. Provision was made for faster growth in this tranche to cater for delivery of more growth to Cork under the NSS. The NSS-related additional growth was referred to as “Tranche 1 Plus” (T1+) in the programme set out by CASP.

The additional growth forecast for T1+ set out in CASP were for illustration and did not imply an upper limit. The distribution of the T1+ target took into account the expected availability of serviced land up to 2006. In the City, T1+ was planned to be accommodated by increasing densities. Under this Tranche a significant proportion of additional development was planned to be allocated to the Ring Towns and rural areas, particularly in the towns and villages in the Youghal hinterland and the Kinsale and Bandon hinterlands.

1.6 Progress towards Achievement of CASP Goals

Achieving a balanced spatial structure was a vital component of the original CASP Strategy and this remains valid as an objective for the updated plan. The table overleaf sets out the goals and supporting policy objectives and indicators in relation to Balanced Spatial Development, which were specified in CASP.

Balanced spatial development in this context refers to the original CASP objectives of developing a framework for spatial planning which balances the need for the creation of critical mass, the integration of land use and transport, the efficient use of infrastructure and the provision of a high-quality environment for people and inward investment. This involved concentration of population in certain areas rather than planning for a more dispersed population settlement. An assessment of progress towards the CASP key variables has been undertaken and has influenced the preparation of this updated CASP Plan.

In examining progress on CASP with respect to the key variables of population, households and employment, an issue arises in that the published CASP did not include targets for 2006. Targets were however provided for the number of dwellings by 2006 and population projections were also made on the basis of a medium migration scenario. While we understand that there may have been more detailed 2006 projections completed as part of the background analysis, these are not part of the published CASP and were not formally set as targets and, as such, they cannot be used to measure progress. In our analysis, therefore, we adopt two approaches to the assessment of progress. Firstly, we look at progress against the baseline 2000 position. Secondly, we compare the 2006 results with indicative implied targets under certain assumptions as follows:

- For population, we look at what would have been implied for population in 2006 under the medium-term migration forecast included in CASP;
- For households, we utilise the targeted figures for additional dwellings proposed under Tranche 1 plus. It is accepted that these may overestimate the implicit target as some of the dwellings may not be occupied but they provide an indication of the number of households envisaged;
- For employment targets, we assume that the ratio of employment increase in the period to 2006 as a proportion of the total envisaged for 2020 is in line with the ratio we are assuming for population growth in the period to 2006 as a proportion of the total population increase projected.

Table 1.2: CASP Balanced Spatial Development Framework

Goal	Policy Objectives	Monitoring Indicators
Include the City, its satellites, Ring Towns and rural settlements as part of a balanced settlement system with all levels of development in accordance with varying economic potential.	<ol style="list-style-type: none"> 1. To deliver equivalent benefits to the entire area. 2. To locate appropriate economic activity in smaller settlements or centres. 3. To avoid excessive routine commuting. 4. To create a polycentric location pattern within Metropolitan Cork. 	Population Growth*. Difference in unemployment rates between best and worst. Employment change by centre. Housing completions by type and centre. Number of people more than 30 minutes from education, health and other facilities. Average distance to work.

Source: CASP 2001.

* This indicator has been included by the consultancy team as it was deemed of significant importance.

The following table presents a summary of progress in relation to population. Among the key findings from this detailed analysis undertaken as part of this updated exercise are as follows:

- The CASP overall population forecast was very accurate and the 2006 Census population numbers are almost the same as the CASP T1 projection (see table 1.3).
- The City population has declined and is well below CASP expectations but the rural areas generally and Ring Town hinterlands grew much faster than anticipated. The necessary measures to address this decline are included in this updated CASP strategy. Also of significance is that the population growth in the rural areas around the Ring Towns have exhibited higher growth than the towns. Population was therefore more dispersed than concentrated and was not aligned with what was envisaged in CASP.
- In the rest part of Metropolitan Cork, the population in the Southern periphery of the City overshot CASP projections, while other areas such as Midleton remained behind their projected levels.

A summary of progress to date in terms of population settlements compared to what was envisaged in CASP is presented in Table 1.3 below. T1 represents the base case projections while T1+ takes account of potential NSS uplifts.

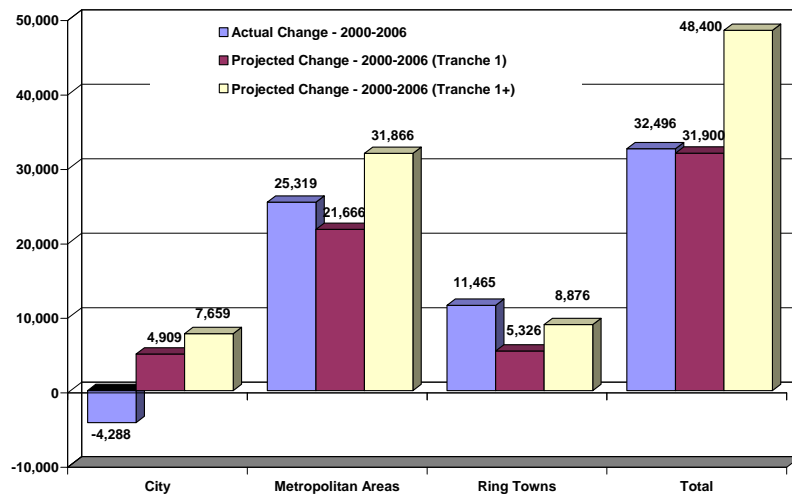
Table 1.3: Summary of Progress on CASP Forecasts by Region – Population

Area	CASP 2000	2006 Indicative		Actual 2006 Population	Difference - Actual-Projection T1
		2006 Indicative Implied Projection T1	Implied Projection T1+		
Cork City	123,810	128,719	131,469	119,522	-9,197
Rest of Metropolitan Cork	127,700	149,366	159,566	153,019	3,653
Ring Towns and Rural Areas	93,590	98,916	102,466	105,055	6,139
Of which:					
Rural Areas	53,560	52,269	54,145	61,428	9,159
CASP Total	345,100	377,000	393,500	377,596	596

Source: Indecon Analysis of CSO data and CASP targets

A comparison of CASP outturn vis-à-vis projections is presented diagrammatically below.

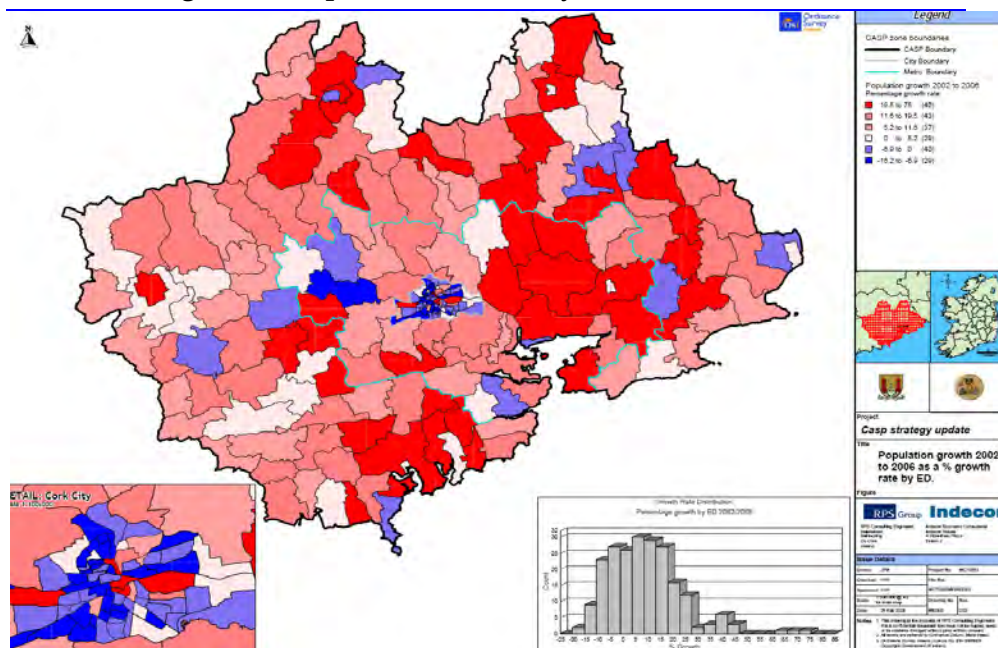
Figure 1.3: Developments in Population Relative to CASP Forecasts



Source: Analysis of CSO Census of Population data; CASP (2001)

Figure 1.4 below describes population growth by sub-area.

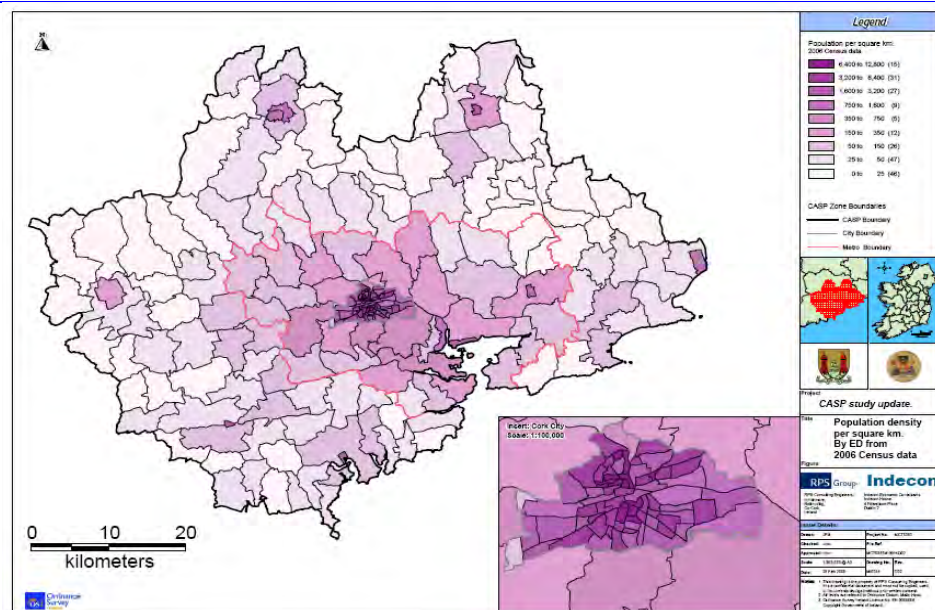
Figure 1.4: Population Growth by sub area 2002-2006



Source: RPS GIS Mapping

Figure 1.5 shows population densities by per square kilometre.

Figure 1.5: Population Density per square km



Source: RPS GIS Mapping

Table 1.4 presents a summary of progress in relation to employment. The figures highlight a relatively impressive performance with employment growing from 155,000 to 173,952. This, however, was slightly less than the projected levels for T1 but this may reflect an overestimation of employment in the original projections.

Table 1.4: Summary of Progress on CASP Targets by Region – Employment

Area	2006 Indicative Implied		2006 Indicative Implied	Actual 2006 Employment*	Difference - Actual-Projection T1
	CASP 2000	Projection T1			
Cork City	65,380	71,993	75,193	75,248	3,255
Rest of Metropolitan Cork ¹	52,580	63,276	65,876	61,457	-1,819
Ring Towns and Rural Areas ¹	37,040	38,683	40,383	34,204	-4,479
CASP Total¹	155,000	173,952	181,452	170,909	-3,043

Source: Indecon Analysis of CSO data and CASP targets

* These figures are based on the aggregate number of persons employed using the SAPS Census 2006 residential data but the geographic allocation of these jobs utilises the CSO POWCAR data set. We have not used the actual POWCAR numbers as this would underestimate the total number of jobs.

Cork City remains the main employment location in the CASP area but a number of significant employment locations have developed in the Metropolitan area in recent years including the Airport Business Park, Eastgate and Little Island. Significant development in the Cork Docklands has not occurred to date and this is a major issue for this CASP Update.

The table below presents a summary of progress towards the CASP goal in relation to households.

Table 1.5: Summary of Progress on CASP Targets by Region - Households

Area	CASP 2000	2006	2006	Actual Households 2006	Difference -	Difference	Difference
		Indicative Implied Projection T1	Indicative Implied Projection T1+		Actual- Projection T1	- Actual- Projection T1+	Actual - Projection T1+*
Cork City	42,330	47,020	48,020	43,971	-3,049	-4,049	-2,828
Rest of Metropolitan Cork	38,950	53,390	57,100	50,889	-2,501	-6,211	-2,316
Ring Towns and Rural Areas	29,750	34,540	35,830	35,788	1,248	-42	1,263
CASP Total	111,030	134,950	140,950	130,648	-4,302	-10,302	-3,881

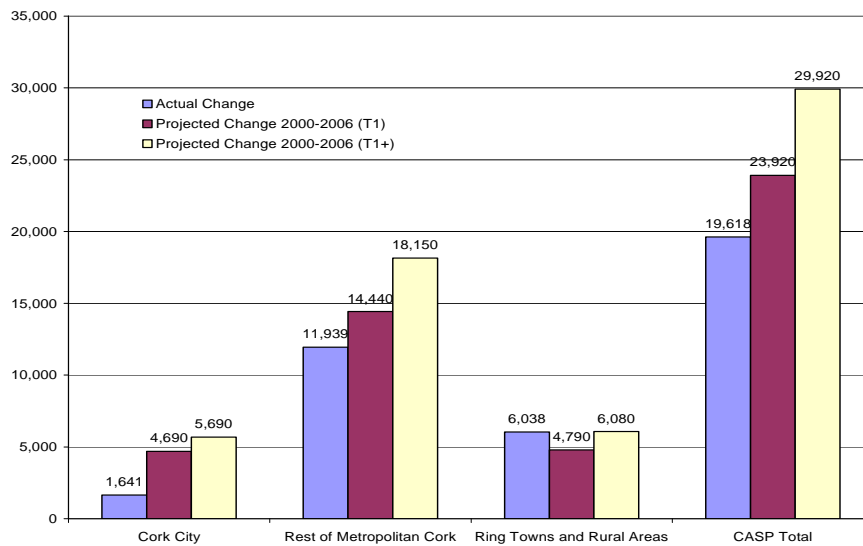
*Source: Indecon Analysis of CSO data and CASP targets. *Additional households assumed to be less than additional dwellings. The variance between additional dwellings and households for 2006 are under this scenario assumed to be the same percentage as assumed in CASP for 2020, namely 21% difference for City, 11.3% difference for Metropolitan Cork, 15.2% for Ring Towns & Rural Areas and overall difference for CASP of 14.06%*

Trends in household formation have largely reflected population trends with the number of households expanding by around 20 per cent between 2002 and 2006 in both the Rest of Metropolitan Cork and Ring Town Areas. This compared with a much slower increase (less than 3 per cent) in Cork City (see figure below). The increase in the number of households in the City, despite the decline in population, reflects the changing demographic and social patterns within households which is a CASP wide issue.

An explicit figure for projected households numbers for 2006 was not included in CASP, but a figure for households for 2000 was presented as well as a figure for additional dwellings proposed to 2006. The numbers for indicative implied projections for 2006 is based on adding the additional dwelling estimate to the 2006 household numbers.

The numbers in the implied projections for households assume that the projections in CASP for additional dwellings for 2006 equates to a projection for additional households. If however one makes the reasonable assumption that the projections for additional dwelling included an implicit uplift to include unoccupied or replacement dwellings, then the CASP implicit household projection for 2006 would be somewhat lower. For example, if it is assumed that the difference in the level of additional dwellings projected for 2020 compared to households also applied to the figures for 2006, then the implicit T1+ projections for households would be 134,529. This is compared with an actual outturn of 130,648. This is shown in the last column of Figure 1.6 below. In either case however, it is clear that household growth in CASP was strong over the period, but less than projected under the T1+ projections.

Figure 1.6: Developments in Number of Households Relative to CASP Targets



Source: Analysis of CSO Census of Population data; CASP (2001)

An emerging issue concerns the consolidation of Ring Towns. This relates to concerns about the scale of development taking place on the periphery of these towns and in particular in rural areas.

1.7 Structure of Report

Following on from this introductory section, the remaining sections of this Update to the Cork Area Strategic Plan are as follows.

Section 2 of this Update outlines a detailed Economic and Investment Strategy which will support and drive the achievement of this updated Strategic Plan.

Section 3 outlines the newly proposed Strategic Plan, indicating the scale of anticipated growth required to underpin the strategy. It then outlines a proposed Spatial Strategy to support this, highlighting the essential need for front loading of infrastructure and co-ordinated transport policies to facilitate the achievement of the proposed spatial strategy and the overall Plan.

Section 4 presents a suggested phasing for the achievement of these newly proposed 2020 Targets, focusing on the phasing of household development out to 2020, together with the necessary phasing of transport infrastructure required to support the achievement of the Strategy.

Section 5 deals with implementation and proposes a number of innovative institutional processes through which the updated proposed Plan can be effectively implemented with reference to governance, marketing and funding issues. This section also presents a revised set of indicators which it is believed will facilitate the task of monitoring progress towards the achievement of the Strategy's goals over the next number of years.

2 Detailed Economic and Investment Strategy

Refocusing of Economic and Investment Strategy

As part of this CASP update for the first time new empirical evidence for the CASP area has been assembled on three key issues, (and are included in background supporting topic papers) namely (i) the level of skills in CASP; (ii) the sectoral performance of IDA (Ireland) and Enterprise Ireland supported companies in CASP and (iii) the Irish economy expenditures of firms based in CASP. These provide important building blocks for the development of an effective economic and investment strategy for the area. While a number of broad economic sectoral options were considered, the fundamental economic challenge for CASP is to widen and upskill its economic base. Enhancing its infrastructure and competitiveness is essential.

The analysis undertaken as part of the background to this update provides a very rigorous examination of employment requirement for CASP which require adjustments to the original targets in CASP. Of more significance is the fact that a much more detailed sectoral breakdown of areas of opportunity have been identified. Areas of potential include nationally and regionally focused market based services, internationally traded services and health and education. There is also potential for some expansion in employment in chemicals and pharmaceutical sectors including bio-pharma and life sciences and in ICT and in the Digital sector but these are likely to be more modest.

2.1 SWOT analysis of CASP area

As part of the background analysis to this Update, a detailed review of the strengths and weakness of the CASP region was undertaken. A summary of the key features of this assessment based on an analysis of the features and performance of the region is presented in the table below. The findings of this SWOT analysis formed a vital input into designing the optimal economic and investment strategy which follows.

Table 2.1: Summary of Key Strengths of CASP Area

- ❑ The presence of economically viable and readily accessible sea port
- ❑ Presence of international airport offering a range of both domestic and international connections
- ❑ Lower cost of living generally than in Dublin (housing, rent, general consumer goods)
- ❑ Labour costs are perceived by firms operating in the Cork area to be lower than in Dublin
- ❑ A comparatively high proportion of Cork City's population is of working age (70.7%), compared with CASP as a whole (69.1%) and the State (69.3%)
- ❑ All areas of CASP exhibit a low and falling dependency ratio, with the City's dependency rate (0.41) being below that across the State (0.44)
- ❑ The CASP area has a comparatively high labour force participation rate of 61.4% relative to a State (58.3%)
- ❑ The CASP area as a whole has experienced an increase of 19.3% in the numbers of people in employment over the course of 2002-2006. This compares to an increase across the State of 17.6%.
- ❑ The industrial/manufacturing sector in CASP includes one of the States highest performing sectors, namely the chemicals/pharmaceuticals sector
- ❑ Employment generation derived from inward investment/FDI has increased consistently over recent years in the CASP area
- ❑ The CASP area Internationally Traded Services and Chemicals sectors have grown more quickly than in the State overall, when measured by permanent full-time employment in agency assisted companies
- ❑ The CASP region has attracted a higher than average proportion of inward investment in the pharmaceuticals/biotechnology, medical equipment/devices, software and R&D-related activities
- ❑ The largest employment sectors among IDA Ireland and Enterprise Ireland-assisted companies are in the expanding Chemicals/Pharmaceuticals sector and the Internationally Traded Services sector.
- ❑ The presence of highly regarded university and the presence of C IT with an increasing graduate throughput in relevant sectors of expertise
- ❑ The presence of a high skills base with particular advantages in engineering, manufacturing and ICT-related fields
- ❑ CASP has a proportionately higher share of graduates emerging in the science, mathematics and statistics related fields (7.1%) relative to the State (5.1%)
- ❑ The CASP area has a relative strength in terms of the proportion of its graduates emerging annually in the Engineering, Manufacturing and Construction related fields (14.3%), relative to a State (12.3%)
- ❑ The CASP area as a whole is perceived to offer a higher quality of life relative to a number of Irish cities including, Dublin, Belfast and Limerick. It is also perceived to offer advantages relative to other cities internationally
- ❑ Cork City in particular has a noticeably higher modal share of people commuting on foot (34%) relative to the CASP area as a whole (17%) and the State (18%)
- ❑ Over 80% of people working in Cork City live within a 30-minute commute of their job. This compares favourably with the State average of 75%

Source: Indecon/RPS analysis

A summary of the key weaknesses identified in our analysis of the features and performance of the CASP region is presented in the table below.

Table 2.2: Summary of Key Weaknesses of CASP Area

- ❑ CASP has higher costs than many European competitor locations
- ❑ Cork City has a high unemployment rate (11.6%) compared to the CASP area as a whole (7.5%) and the State (8.5%)
- ❑ Labour force participation in Cork City is low (at 54.6%) relative to CASP (61.3%) and to the State as a whole (62.5%)
- ❑ Cork City as a whole has low share of people at work (48.3%) relative to the State average of 57.2%
- ❑ The industrial sector in the CASP area is dependent on a relatively small number of sectors and particularly multi-national firms in the chemicals/pharmaceuticals sector
- ❑ IDA and Enterprise Ireland-assisted employment levels have largely been static in overall terms in recent years relative to the State as a whole. Moreover, employment in Irish-owned agency assisted companies is in decline
- ❑ Educational attainment levels among the population resident in Cork City are lower than the position across CASP as a whole
- ❑ Certain key infrastructural deficiencies which unless addressed will impact on economic development

Source: Indecon/RPS analysis

The table below presents a summary of the main opportunities and also the key threats/challenges facing the CASP area which have been identified based on our analysis of the features and performance of the region.

Table 2.3: Summary of Key Opportunities and Threats/Challenges for CASP Area

Opportunities
❑ Opportunities for CASP to be a base for nationally traded market services as well as internationally traded services
❑ The opportunity to foster greater innovation and research based links between firms operating in the CASP area and higher education institutions within Cork
❑ The opportunity through targeted spatial strategy to redress the ongoing fall in the population of Cork City and to revitalise the city going forward
❑ Cork City has a relatively high proportion of population holding a 3rd-level qualification, suggesting an opportunity to leverage this feature to develop knowledge-based economic activities in the City and in the CASP region
Threats/Challenges
❑ Adverse cost features in specific areas affecting Cork's competitiveness
❑ Any potential adverse developments in Chemicals/Pharma sector and the Construction sector will have a disproportionate impact on Cork due to its reliance on these sectors
❑ A continued decline in the population of Cork City further exacerbating the spatial imbalance which has emerged in the CASP area

Source: Indecon/RPS analysis

2.2 Identification of Optimal Economic Development Models

An important issue requiring consideration concerns the most effective economic development models for CASP. In considering potential alternative approaches, we believe a number of key features must be reflected in the formulation of potential approaches, namely:

- ❑ The need to ensure a diversified economic base which encompasses high value-added economic activities in foreign-owned industry and domestically owned internationally traded services, and which minimises the risks attending over-emphasis on any one sector, or a limited number of potentially vulnerable sectors;
- ❑ The need to address specific issues within the CASP region in terms of localised social exclusion and economic deprivation/high unemployment;
- ❑ At a spatial level, the need to bring into closer alignment the location of jobs with that of population so as to minimise unsustainable commuting patterns and maximise the usage of existing and proposed infrastructure;
- ❑ The need to ensure a labour and skills strategy which provides an education and skills base which is aligned with the requirements of inward and domestic investment and industry locating in the CASP region; and
- ❑ The projections also take account of the fact that some employment will need to be located in major population centres.

2.3 Proposed Sectoral Economic Development Strategy

The core element of the proposed revised economic strategy is to place more emphasis on sectoral areas of potential and on the measures required to realise this potential. These measures include strategies to facilitate a more diversified economic base, a focus on cost competitiveness and choice of investment locations, a significantly expanded labour market and skills strategy and a specific targeted plan to develop the Docklands.

This update of the CASP outlines an ambitious economic development strategy for the CASP area that is designed to deliver a major uplift in economic growth and employment capable of sustaining the increased population now being targeted at the area. In particular, this strategy:

- ❑ Ensures a diversified economic base which encompasses high value-added economic activities in foreign-owned industry and domestically owned traded services, and which minimises the risks attending over-emphasis on any one sector or a limited number of potentially vulnerable sectors;
- ❑ Addresses specific issues within the CASP region in terms of localised social exclusion and economic deprivation/high unemployment;
- ❑ At a spatial level, addresses the need to bring into closer alignment the location of jobs with that of population so as to minimise unsustainable commuting patterns and the need to maximise the usage of existing and proposed infrastructure.

As highlighted previously, it is estimated that over the period 2006-2020, a total of some 45,000 additional jobs will be needed to sustain targeted levels of population growth in the CASP area. In terms of the delivery of this enhanced job creation target, at sectoral level, the updated plan focuses employment generation on those sectors/activities in which there are existing or emerging strengths in the CASP region.

Based on the detailed analysis of developments both in the CASP area and at national level undertaken as part of this update, it is considered that there is significant scope for job growth in the traded services sectors. It is further considered that there is potential for some employment increases in certain high-end manufacturing areas which already have a presence in Cork or where an emerging presence is apparent. In particular, these would include sectors such as ICT, Pharma, life sciences and medical technologies. In some rural parts of the region, food production also offers potential. However, it would be unrealistic to expect substantial employment growth in these latter sectors. The strategy also supports the ongoing development of CASP as internationally attractive cluster of bio-pharma and ICT sectors as envisaged in CASP. In addition to these 'clusters', the updated strategy proposes a wider focus on other sectors including the services sector. Most employment growth will be in the services sector, broadly defined. The main areas of potential growth include the following:

- ❑ Internationally-traded services including business services, software financial education, and a range of back-office functions;

- Nationally-traded services including areas such as head office activities for Irish corporates and health, education, consumer services and business services oriented.

The table below sets out an indicative sectoral breakdown of the level of employment generation implicit in the updated proposed strategy.

Table 2.4: Sectoral Breakdown of Employment in Proposed Updated CASP Area - 2006 - 2020

Industry	Actual 2006	Forecast 2020	Change in Jobs (+)
Industry	47,513	54,431	6,918
Non-Market Services	36,916	42,364	5,448
Market Services	70,415	100,667	30,253
Other	16,066	18,467	2,402
Total	170,909	215,930	45,021

Source: Indecon analysis

As the table above reveals, the bulk of anticipated employment growth in the CASP area will occur in the services sector and most especially in the area of market services.

The table below provides a more detailed sectoral breakdown of the market service sector. It should be noted that many of these services sector categories involve high level knowledge economy jobs. While the skill levels for banking and financial services are well known, the category real estate renting and business activities is somewhat misleading and includes knowledge intensive sectors such as research and development, computer and related activities, legal activities, architectural and engineering activities and related technical consultancy as well as accounting, auditing and tax consultancy. Similarly the transport, storage and communications sectors including high skilled employment in telecommunications.

The road-map of how to secure future business in this area is inherent in the proposed economic strategy. The key element include the following

- Front loading of infrastructure;
- Implementation of an effective skills strategy;
- Sustainable land use planning;
- Marketing of the CASP region.

In considering the projections for sectoral areas of increased potential, it should be noted that the figures for change in jobs represent net increases in employment after potential job losses are accounted for. The estimated number of gross new jobs created will therefore be much higher than indicated. The targets set have been rigorously estimated and would represent a step change in performance but one which is achievable. For example, in banking and financial services a net increase in jobs of 2,262 is targeted and while it is of course possible that this figure will be exceeded, it implies a very significant number of (gross) new jobs created in the banking and financial services sectors when one takes account of job reductions. Overall, the Strategy assumes a net increase of over 47% in employment in the banking and financial services sector in CASP, at a time when the sector is internationally, reducing employment.

Table 2.5: Sub-Sectoral Breakdown of Employment in Market Services in CASP Area - 2006 - 2020 - Economic Development Option 1

Industry	Actual 2006	Forecast 2020	Change in Jobs
Wholesale and retail trade	24,269	30,200	5,931
Real estate, renting and business activities	17,262	25,167	7,905
Transport, storage and communications	9,058	14,093	5,035
Hotels and restaurants	8,716	12,080	3,364
Banking and financial services	4,785	7,047	2,262
Other community, social and personal service activities	6,324	12,080	5,756
Total	70,415	100,667	30,253

Source: Indecon Analysis of CSO SAPS data and Indecon Model of Employment Generation

We believe there is a greater potential for national and internationally traded, market-based services in the CASP region, and in business services and banking/financial services. Consequently, we have adjusted the proportions of employment generation in the region for these sectors. These still indicate a lower share of employment in these sectors compared with the Dublin region.

Specific Initiatives to develop the Docklands

The Docklands represents a key area of potential for the City and wider CASP region. There are various plans to achieve an integrated, vibrant mixed-use development in the area. The challenge is to implement these plans and to put in place the necessary key development mechanisms.

There will be a need for public intervention in terms of infrastructure, sectoral prioritisation and public sector funded activities or incentives to spur development in the area. Effective structures to support this development will also be needed.

Key sectors of potential in the Docklands include the following:

- National Market Based Services
- Internationally Traded Services/Mobile Services
- Health and education
- Bio Pharma/Pharmaceuticals, Medical Devices and Life Science Sectors
- ICT and Digital Media.

It should also be noted that the Docklands is an ambitious project and one which the City and CASP needs to be successful. It will need support policies and mechanisms and there is a need to put in context the timeframe for its delivery to the market and its absorption within the markets. This will need national and international investment. The focus will need to be on high value services end facilities with companies that want to be part of a new business district in a city and are prepared to commit to significant volumes of space. The importance of certainty on the cost and deliverability of infrastructure to the Docklands area is also emphasised in this updated CASP plan.

In addition, there is a need for the front-loading of infrastructure to support development of the Docklands. The Docklands Local Area Plan sets out a programme of infrastructure requirements for the delivery of the plan. This should be prioritised in the short term to support the development of the Docklands. The key transport elements are:

- The Eastern Gateway bridge;
- Road bridge at Water Street;

- ❑ Public transport bridge at Mill Road;
- ❑ Local roads infrastructure;
- ❑ The provision of a rapid transit link with the City Centre.

The major focus on developing the Docklands while also facilitating certain types of development elsewhere in Cork City and other parts of CASP reflects the fact that the City Centre/Docklands market is different to what is being produced and should be developed and delivered in the suburban market. There are different sectoral characteristics and requirements and there is also a significant difference between the cost in the City Docklands environment as opposed to the suburban environment. There are two distinct markets in terms of office space and for some sectors price is a significant factor in terms of general office use and office based economic activity.

The development of docklands is key to the regeneration of the city. It can lead to the provision of high density, high quality residential units, endowed with attractive features such as promenades, walkways and water front developments. The Docklands if correctly marketed can also provide an attractive location for high quality office and commercial accommodation.

Implementation of Labour Force and Skills Strategy

A new focus of this updated CASP strategy is the inclusion of a labour force and skills strategy. To facilitate the achievement of the proposed economic and investment development strategy for the CASP region it will be necessary to complement this strategy with supporting labour and skills strategy. An effective labour and skills strategy must deliver the following key outcomes:

- ❑ Attraction of additional high skilled employees to the area;
- ❑ The need to increase participation in the workforce and enhance labour supply in line with targeted growth in the population of the CASP area;
- ❑ The provision of skills required to support the targeted growth in employment and to maximise the attractiveness of the CASP area for potential investors;
- ❑ The delivery of specialist skills to reflect the increased demand for specific skill sets commensurate with the sectoral profile of employment generation going forward in the CASP area; and

- The need to address issues of low educational attainment in parts of the CASP area.

If CASP is to realise its economic development goals, there will be a need to enhance the overall supply of specialist skills in line with the targeted increase in population and the mix of skills to reflect the evolving structure of economic activity and employment going forward. While a comprehensive assessment of skill requirements for CASP is beyond the scope of this update exercise and should be undertaken subsequently by the CASP implementation team, as part of the update significant new analyses on existing skills and the implications of the proposed economic development strategy in terms of the linkage with the projected labour force in CASP has been undertaken. An alignment of third and fourth level education to support the targeted expansion in business, financial and other services is required. A summary of indicative skill requirements is presented below.

Table 2.6: Education/Skills Requirements – Base Case Scenario for Educational Attainment Levels – Key Assumptions

Proportion of Labour Force/ by Educational Attainment Category and Region	2006 Proportion	2020 Target
	% Total	% Labour Force
<i>NFQ levels 1-3/Primary Education only</i>		
CASP	14.8	3.8
<i>NFQ levels 4-5/Lower-Upper Secondary only</i>		
CASP	49.3	46.0
<i>NFQ levels 6-10 Third level/Degree or higher</i>		
CASP	31.7	50.6

Source: Indecon analysis

In order to attain a 2020 skills target of 50.6% of the CASP area labour force to hold third level qualifications will require an additional 59,335 persons within the CASP labour force to achieve such qualifications. While this is a very ambitious objective, it highlights the potential scale of change which may be required for a high skilled successful city region.

Table 2.7: Education/Skills Requirements – Base Case Scenario for Educational Attainment Levels

Details	Number
2020 Projected Labour Force for CASP	233,027
50.6% with NFQ levels 6-10	117,912
Current 2006 Labour Force	184,784
Current 2006 % (31.7)	58,577
Implied additional graduates by 2020	59,335
<i>Average annual % increase in graduates between 06-2020</i>	<i>5.0</i>

Source: Indecon analysis

In order for Cork to develop as a competitive knowledge-based regional economy, a concerted and co-ordinated plan is required to attract and retain skilled human capital, foster indigenous talent and create effective networks between academia and industry. The required research for the Plan should;

- Identify the skills requirements of the future;
- Assess what primary/secondary/third level facilities will be needed as well as post-graduate and research capabilities;
- Examine the up-skilling needs of the current workforce.

3 Proposed Overall Strategic Plan

3.1 Introduction

The new updated plan for CASP is underpinned by an updated set of key strategic targets pertaining to population, jobs and household formation. The key plan statistics are highlighted in the table below, which also indicates the progress towards the original 2020 projections in terms of 2006 outturns. In relation to progress to-date, it is notable that the overall population of the City-Region totalled 377,596 in 2006, compared with the original CASP 2020 projection of over 423,000 persons. In terms of employment, the number of jobs located in the CASP area reached almost 171,000 in 2006 compared with the original 2020 projection of 201,370. While job growth to 2006 was slightly less than anticipated, this may have reflected over optimistic projections for employment contained in the original CASP. The number of households totalled 130,648 in 2006 versus an original 2020 target of over 160,000.

In line with the original objectives of CASP, this updated strategy has been formulated to achieve a Vision for Cork, to address the key development issues identified for Cork and to improve the quality of life for the people of Cork and visitors to the region over the remainder of period to 2020 and beyond. A summary of the key plan statistics is presented in the Table below, together with a schematic outline of the Plan area.

Table 3.1: Key Plan Statistics

	Original CASP*	2006 - Actual	Updated CASP	Growth - 2006-	
	area 2020 Target		area 2020 Projection	2020 Number	%
Jobs	201,370	170,909	215,930	45,021	26.3
Population	423,150	377,596	488,000	110,404	29.2
Households	160,350	130,648	202,492	71,844	55.0

*Excludes NSS uplift

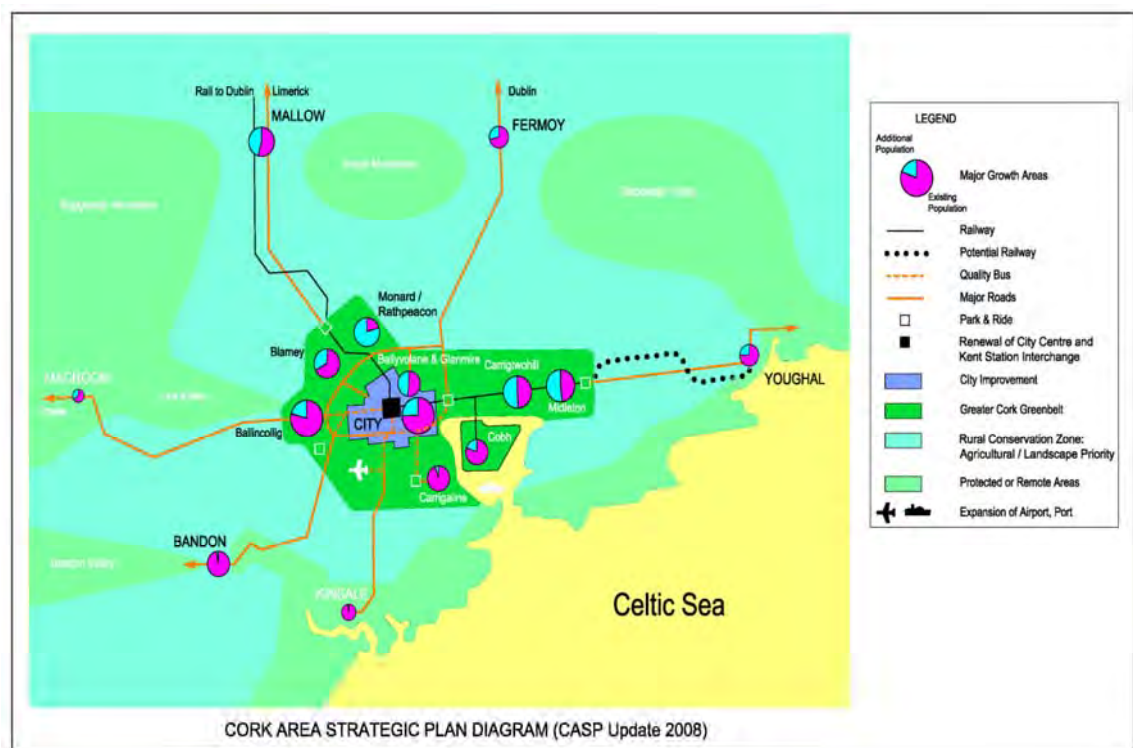
This updated CASP plan envisages that the population of the City-Region will grow to approximately 488,000 by 2020, implying an increase on current (2006) levels of some 110,000 persons. The number of jobs is envisaged to expand by over 45,000 to close to 216,000, while the number of households is targeted to rise by approximately 72,000 to 202,000 by 2020.

If these projections are to be realised then the updated CASP plan requires action in the following areas:

- ❑ **Realignment and reinforcement of spatial planning and land use policies;**
- ❑ **Refocusing of economic and investment strategy;**
- ❑ **Front-loading of infrastructure and implementation of integrated transport strategy;**
- ❑ **Specific initiatives to develop the Docklands;**
- ❑ **Implementation of labour force and skills strategy.**

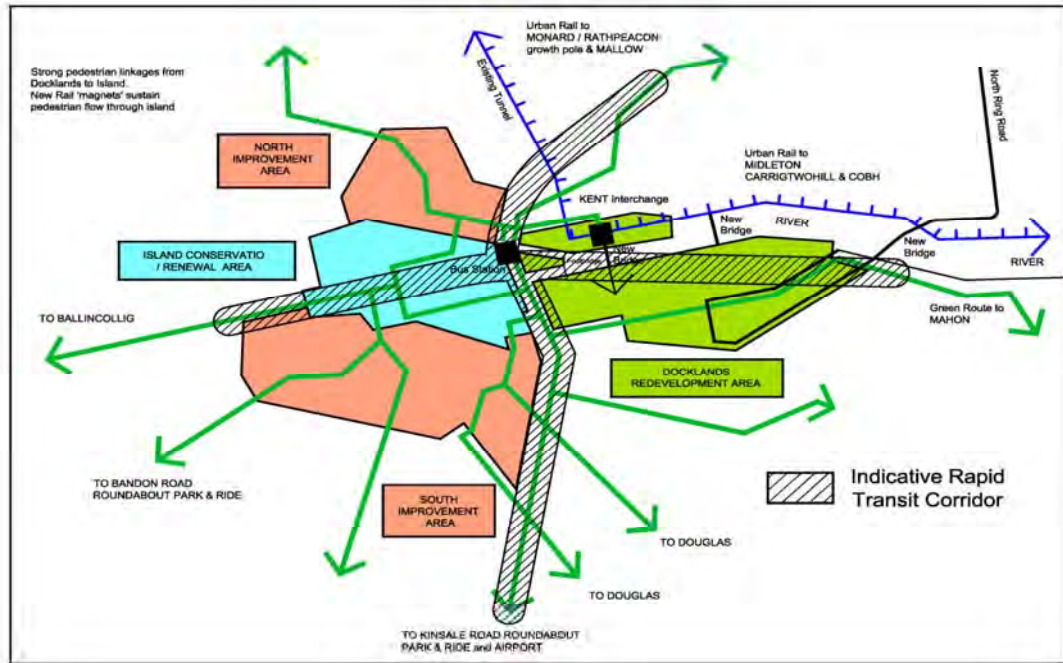
A presentation of the proposed updated Cork Area Strategic Plan is presented in Figure 3.1.

Figure 3.1: Cork Area Strategic Plan Diagram



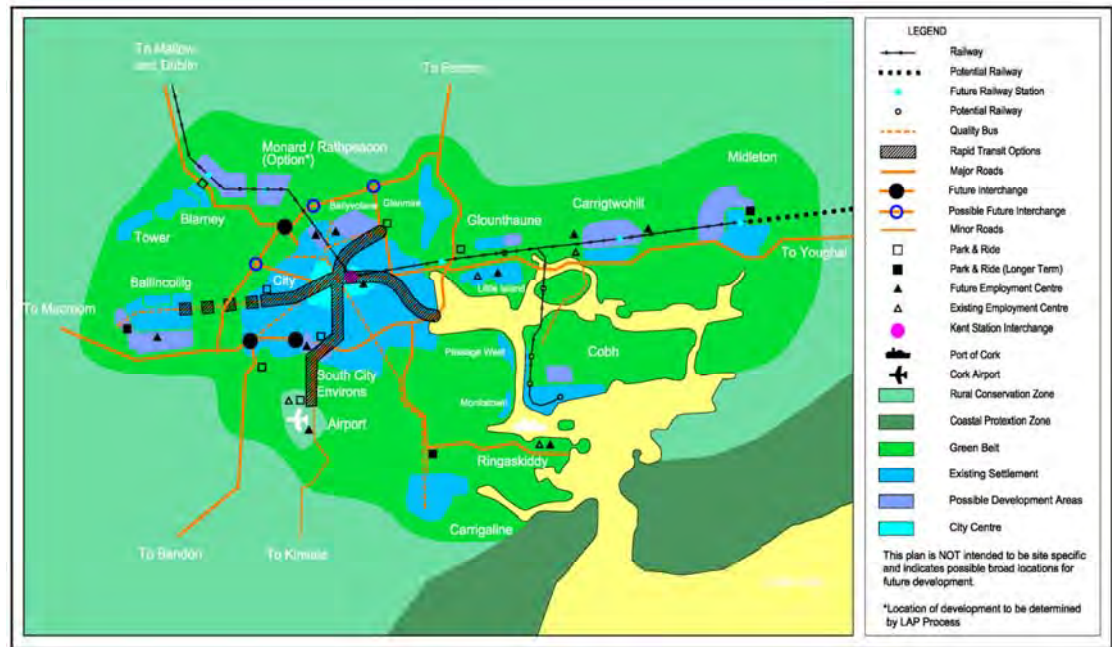
Source: RPS GIS Mapping

Figure 3.2: Concept Diagram for the Inner City



Source: RPS GIS Mapping

Figure 3.3: Structure Diagram for Metropolitan Cork



Source: RPS GIS Mapping

3.2 Key Concepts

The updated CASP is underpinned by the following main concepts:

- ❑ Revitalisation of Cork City and the Docklands– and in particular the revitalisation of the City Centre as the main location for comparison-shopping, services and culture in the region and the delivery of the Docklands as a significant mixed-use sustainable community. Also key are measures to address the declining population in Cork City;
- ❑ Development of the Docklands
- ❑ Redefinition of Metropolitan Cork;
- ❑ Reinforcement of the Ring Towns – which are to become the focus for growth outside the metropolitan area;
- ❑ Infrastructure-led development – The updated CASP seeks to ensure that infrastructure (such as roads, public transport, water and sewerage) and community facilities will be provided ahead of, or in tandem with, housing and other uses in all new development;
- ❑ Creation of an integrated transport system;
- ❑ Creation and maintenance of a high quality environment.

Each of these concepts which were included in the original CASP remain valid in the current context and underpin the Updated Strategy presented. However, one element of the updated strategy which is given particular focus in this update is specific initiatives to develop the Docklands. In addition two new elements are included in the updated strategy, namely:

- ❑ Refocusing of economic and investment strategy;
- ❑ Implementation of labour force and skills strategy.

A fundamental objective of the CASP Update is to ensure development happens in a sustainable manner. It is also clear that the sustainability/ environmental agenda is now starting to have a significant effect. There are likely to be opportunities for the CASP region to secure competitive advantage of this area, in the context of both regional economic development and the regional eco-system. There should be a focus on the following:

- Energy conservations and services;
- Waste reduction and recycling;
- Sustainable technologies;

- Green building;
- Alternative Energy.

More fundamentally, there is an opportunity for the CASP region to show strong leadership in the field of reducing emissions and making a significant step towards sustainability. The risk of ongoing increases in energy prices has implications for the economy and for the competitiveness of the CASP region. This will require a multifaceted approach including an emphasis on key issues such as climate change, energy conservation and reduced emissions, in order to meet the targets of the National Climate Strategy 2007-2012. This has been reflected in the proposed spatial strategy as well as forming the focus of integrated transport plans and the development of public transport initiatives (advocating the use of walking and cycling in particular) which are well suited to Cork given its compact nature and concerns with congestion.

REALIGNMENT OF SPATIAL STRATEGY AND LAND USE POLICIES

The broad thrust of the original CASP spatial strategy was appropriate but changes are now required to take account of policy developments to date, and market and economic changes and the need to accommodate higher targets for population growth. There is a need, in the updated plan, to realign spatial strategy and land use policies with the original CASP strategy. Of particular significance is the need to reverse the decline in population in the City and to address the more rapid expansion in population in rural areas of the Ring Towns, contrary to what was envisaged.

A number of spatial options were considered as part of this updated CASP and evaluated against the original CASP goals including simply permitting a continuation of existing trends. This would, however, have resulted in a decline in the population of Cork City which by 2020 would decline to 106,000 compared to the targeted goal of an increase in population in the City to 150,000.

The proposed spatial strategy involves a realignment of the population settlement with the original CASP plan but takes account of market and economic developments and also reflects capacity issues and the need to support rapid transit corridors.

It also incorporates some new clusters of population in the City and Metropolitan areas and takes account of the fact that the timing of completion of some population settlements such as Monard will be different to that originally envisaged in CASP. The proposed expanded clusters take account of the following:

- Co-location: Matching population and employment growth as much as possible in the same locations but taking account of the role of the City as an engine for economic development for CASP.
- Public Transport Provision: Delivering high quality public transport links to these locations
- Infrastructure Availability: To try to ensure the best use of existing infrastructure and minimise the need for significant new infrastructure provision
- Environmental Protection: to ensure that development strategy minimise the impact on the environment
- Mobility: the ability to move around a town / district
- Accessibility: the extent to which it is easy or difficult to reach a particular location.

The proposed spatial strategy also takes account of the following developments¹:

- The consideration of the potential for Mass Rapid Transit in the city;
- The capacity of the City and other areas to accommodate population increase;
- The ability of Metropolitan and Ring Towns to accommodate a substantial proportion of their population growth within urban areas;
- The ability of the regional/local economy to generate jobs activity in the appropriate locations to support new populations;
- An acknowledgement that committed public investment in the heavy rail line should continue to be supported and exploited;
- An appreciation that significant policy development has occurred in the County Council area on foot of the original CASP strategy, namely the adoption of Special Local Area Plans for identified growth areas;
- An acceptance that the City will and should continue to be the engine of growth for the sub region but has however to date experienced difficulties in meeting some of the original CASP growth targets;
- A response to the emergence of significant trip generators in orbital locations that are almost completely car-based (Airport and Mahon

¹ The points raised in the bullets which follow are not prioritised in any specific order.

Point) and the need to provide public transport solutions for such locations;

- An attempt to move further towards the integration of public transport modes that develop a system which does not start and stop at the city centre plus other locations not well served by public transport;
- The relocation of port activity to the Ringaskiddy area and the implications for future employment growth, public transport provision and freight movements. The timing and funding of any public transport proposals is relevant in this context;
- A recognition and consideration for the potential to deliver further high quality rapid transit public transport corridors, particularly to the east and west of the city;
- A recognition of the important role that transport and land use planning can play in helping social inclusion by providing better access to employment, health and leisure facilities.

The proposed spatial strategy is in effect a return to the original CASP targets but with adjustments for market and economic developments and with an uplift for NSS population. A readjustment has also been made to take account of the potential for certain new clusters of population and capacity issues. This proposed spatial strategy scores well, on all of the key CASP goals of economic growth, social inclusion, environment, balanced spatial development, urban renewal, transport and infrastructure.

It is considered that all locations across the CASP area will accommodate a certain level of natural and incremental growth in population and employment over the period to 2020. The essential question is what areas can accommodate significant growth in a sustainable manner that best adheres to the key CASP Goals.

Directing strong growth to the Ring Towns, with the exception of Mallow, has not emerged for a number of reasons, mainly related to their connectivity to other areas within the CASP region, particularly by public transport, existing infrastructural deficits and their feasibility as strategic employment locations. This has also been influenced by the relative ease and cost of developments outside of the Ring Towns. The development strategy going forward for the Ring Towns proposed in this updated strategy is one of continued reinforcement of their role within the region, particularly their support of their rural hinterlands, the resolution of infrastructural issues and addressing the issue of one-off rural housing by ensuring that growth within the Ring Town Area is accommodated in urban, rather than rural locations.

In relation to the City and Rest of Metropolitan areas, the planning strategy for accommodating future population growth in these areas should be focused on the following key variables:

- Intensification of existing density targets within urban areas
- Joint co-operation, liaison and co-ordination on key Metropolitan Cork planning issues, including car parking; employment policies, including office developments; recreational and amenity policies, including the role of the greenbelt; and public transport
- The identification of new greenfield land for development should be premised on accessibility to high quality public transport and proximity to existing urban centres.
- The City Centre will continue to be the engine of growth for the sub region and Docklands is the key location in this regard;
- There will be strengthening of Metropolitan and Ring Towns;
- The role of Mallow as a Hub town should be recognised and accounted for and implementation of the Mallow SLAP;
- Ringaskiddy will continue act as a strategic employment location and indeed should see primarily industrial employment growth based on the relocation of port activity from Docklands.

In this regard the strengthening of the City Centre's function, the development of a comprehensive development strategy for Mallow and the delivery of high quality public transport to Ringaskiddy form a key part of the proposed spatial development strategy going forward.

New green field development locations were not considered appropriate for significant population growth given a number of factors including: the costs involved in the provision of infrastructure, the need to consolidate and strengthen the functions of existing locations, the recognition that they would be 'asset poor' in terms of soft infrastructure and the limited availability of options to deliver high quality public transport to such locations. However, certain new targeted clusters for development have been identified.

The proposed spatial development of the City is focused on the delivery of additional population and employment growth at Docklands (North and South). It is also proposed that Kilbarry, Mahon and the Tramore Road are developed as strategic employment locations and that Ballyvolane is developed as an additional growth location. The proposed spatial strategy involves reinforcing the City's role as the engine for growth for the region.

In addition to the strengthening of the City Centre's function, the proposed spatial strategy involves the strengthening of the Metropolitan towns and comprehensive development of Mallow in line with the recently adopted Special Local Area Plan, and support for the development of Ringaskiddy as a strategic employment location, focused on industry. The proposed strategy also involves the strengthening of the Ring Towns. The strategy takes account of the fact that Middleton lies on the Atlantic Corridor.

Ideally employment and population would be placed in the same location to reduce commuting and to enhance sustainability. This principle has guided the proposed realignment of the spatial strategy with increased population being targeted for the City where there are significant existing employment opportunities. Increased population and development is also targeted for the City and key centres within Metropolitan Cork and in the Ring Towns. There are however constraints on this policy of directing employment to areas of population because significant population has been located in rural areas, contrary to original CASP goals. There are also constraints in co-locating employment and population due to capacity issues and the need for employers to have access to a sufficiently large pool of skills. In cases where co-location is not feasible the strategy has focused on locating population in areas with access to a rail link and potential rapid transit transport options.

Table 3.2 highlights the proposed updated distribution of future population growth implied by the enhanced high-level targets set out above. These revised or updated projections reflect developments in population since the original CASP and the assessment of growth requirements undertaken as part of this update.

The proposed spatial strategy involves concentrating a significant proportion of population growth for the City in areas approximate to the centre, including in areas such as the Docklands, the North City Environs, both at Old Whitechurch Road north of Blackpool and Ballyvolane. It would also see the City and its environs accommodating population and employment growth at the Docklands, Ballincollig, Mahon, Tramore Road, Kilbarry, Ballyvolane and Blackpool.

The strategy also envisages the strengthening of the City Centre's function, both in terms of population and employment.

In terms of Metropolitan Cork, in addition to the proposed population growth in Ballyvolane and the Tramore Road corridor which straddle both the City and County, further population growth is envisaged along the heavy rail line to the north and east of the City at Blarney, Monard, Glounthane, Carrigtwohill, Middleton and Cobh. It is not envisaged that this will require significant additional lands to be zoned, but rather that a change in densities is achieved on lands already zoned for development. Significant employment growth is envisaged at Carrigtwohill and Little Island, with Ringaskiddy and Whitegate/Aghada the principal locations for new industrial employment. Additional population and employment growth is anticipated at Ballincollig, and will assist in sustaining the provision of a high quality public transport corridor connecting Ballincollig to the City Centre, Docklands and Mahon. In terms of the Ring Towns, the focus is on the comprehensive development of Mallow as Cork's hub town, in line with the recently adopted Special Local Area Plan. The proposed strategy also involves the strengthening of the other Ring Towns, with a focus on population growth in the urban areas and a corresponding increase in local employment opportunities.

Following the publication of the 2006 preliminary Census results, the *Department of the Environment, Heritage and Local Government (DoEHLG)* deemed it necessary to review the population projections used to develop the *National Spatial Strategy* which formed the basis for Regional Planning Guidelines adopted from mid-2004². These new population projections and targets on a regional level were issued by the Department in February 2007.

² Department of the Environment, Heritage and Local Government, February 2007.

Subsequently, the South West Regional Authority commissioned a study³ to re-allocate the new regional target between the constituent areas of the region. This allocated a total population to the CASP area of 488,000 by 2020. It also set specific high-level population targets for Cork City and the combined rest of Metropolitan Cork and the Ring Towns and Rural Areas. The allocation of these targets between the city and county were accepted and agreed upon by Cork County and City Councils.

Table 3.2 outlines the updated future population targets to 2020 for the main geographical components of the CASP area. These revised or updated targets reflect the developments in population since CASP, as indicated in by the Census of Population 2006, and the assessment of growth requirements undertaken as part of this update. An updated target for population in Cork City of 150,000 is identified, while Metropolitan Cork is assigned a target of 216,240 and the Ring Towns and Rural Areas given a population target of 121,760. These targets are significantly larger than the original 2020 targets for population as set out for each area in CASP, and take account of recent demographic developments and projections issued by the Department of the Environment, Heritage and Local Government.

Table 3.2: Future Population - Updated CASP Targets

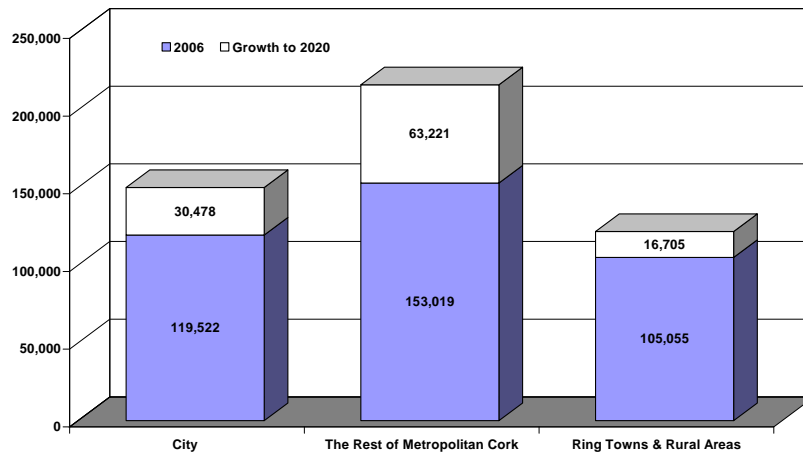
Area	Original CASP 2020 Target	2006 Actual	Updated 2020 CASP Projection	Implied Population Growth - 2006- 2020
City	135,820	119,522	150,000	30,478
The Rest of Metropolitan Cork Ring Towns & Rural Areas	180,710	153,019	216,240	63,221
CASP Total	423,150	377,596	488,000	110,404

Source: Indecon/RPS analysis of CSO SAPS Data, CASP 2001

Figure 3.4 highlights the updated position in terms of the scale of growth envisaged, together with its distribution within the CASP area, over the remainder of the period to 2020.

³ See Working Paper by Jonathan Blackwell for the South West Regional Authority - July 2007

Figure 3.4: Scale of Anticipated Growth in Population



Source: Indecon/RPS analysis

To ensure that Cork can achieve its full economic potential it is necessary to focus strong growth to the City and Metropolitan areas. In order to ensure sustainability and to minimise the use of scarce infrastructure, the Update is proposing to concentrate growth in a limited number of areas. This is also essential to underpin effective transport investment. It is recognised that there are constraints to the timely development in these areas, most notably the lack of infrastructure, and that these constraints must be tackled in the short-term.

Co-ordinated approaches between the City and County Councils, as well as other key stakeholders at Departmental level, to tackle the significant constraints to the sustainable and timely development of Cork Docklands, including the relocation of the City Quays and the Seveso sites, is crucial in the short-term, and progress on this will need to be carefully monitored.

The capacity of areas to accommodate growth will also require high densities. Accommodating additional allocated growth, particularly along the rail line settlements will require adjustments to densities in order to ensure a compact and sustainable pattern of development. This will have to be actioned in a way which meets market requirements from a user perspective, and will mean the encouragement of a mix of dwelling types and sizes within any particular development. We accept that there can be tensions between increased provision of choice of accommodation and higher densities, but this will need to be managed to ensure that the projected increase in population can be met in a sustainable manner, consistent with the CASP objectives.

Future growth in the CASP region needs to be solidly based on the principle of sustainable development and in particular, needs to take place in a way which supports the use of sustainable transport modes (public transport, cycling and walking). The Updated CASP Strategy proposes that development should be directed along the Cork suburban rail corridor, which would support the investment that the Government is making in suburban rail. The Updated CASP Strategy therefore provides a phased approach which gives priority to growth along the rail corridors. In particular, the Strategy envisages that growth would first (under the updated Tranche 2), be directed to locations along the rail line, and in the City/Docklands. This needs to be carefully monitored as less development in the rail corridor would undermine the basis for the substantial investment already committed and would weaken the case for future public transport investment. In other words, policies on densities must support the planned growth and support infrastructure must be put in place. It is critical that the land use policies set out in this Update are carried through into the development plans of the local authorities, and are translated into action on the ground. The phased approach will give priority to growth along the rail corridors, will be implemented as part of development plans and planning decisions, and will be monitored by the CASP Steering Committee.

Employment Growth

Based on the model of employment generation developed as part of this update, the level of job creation required within the CASP area consistent with sustaining the targeted growth in population as described above is estimated.

Table 3.3 indicates the updated projections for the distribution of job creation within the CASP area. The enhanced economic and investment strategy (described further below) is designed to deliver a major uplift in economic growth and consequent employment generation within the study area, amounting to an estimated 45,000 new jobs over the remainder of the period to 2020, compared with the 2006 position. Within the study area, it is proposed that the original CASP projection for 2020 for employment in the city of 81,560 should be increased to 90,691 from its current level of 75,248. The employment projection for the rest of Metropolitan Cork should be increased from 78,750 to 82,053 and the projection for Ring Towns and Rural areas, including Mallow, should be set at around 43,000.

Table 3.3: Updated CASP Employment Projections

Area	Original CASP 2020 Targets - Total Jobs	Updated 2020 Projections - Total Jobs	2006 Actual Jobs	Increase over Original CASP 2020 Forecasts	Projected Additional Jobs 2006 to 2020
City	75,248	81,560	90,691	+9,131	+15,443
Rest of Metropolitan Cork	61,458	78,750	82,053	+3,303	+20,595
Ring Towns & Rural Areas	34,205	41,060	43,186	+2,126	+8,982

Source: Indecon/RPS analysis

It should be noted that the actual level of employment in each area in 2020 (while facilitated by planning and other policies) will be largely determined by economic and market forces and by the commercial decisions of new investors and the viability of existing businesses and other employers. It will also be influenced by the mix of economic activity with higher skilled, higher income activity being somewhat less employment intensive. The long term employment projections for CASP and for different parts of CASP are therefore employment projections and not targets as such.

Employment projections for specific sub-areas is much more complex than a simple correlation between employment and population. It is not realistic to have a large amount of high level employment in every location and the projections also reflect the fact that our strategy envisages a re-structured economy for the City with a choice of locations for an array of employment types.

Strategic Employment Locations

All settlements in CASP will attract investment and employment and develop the range and extent of services to facilitate projected population growth. However, there are particular locations which should become the focus for most of the additional projected employment growth, which represent strategic employment locations.

Strategic employment locations are identified as those locations, either existing or new, which have the capacity to accommodate additional employment growth, located on an existing or proposed public transport corridor, close to, or readily accessible by, existing and expanding population centres. These locations also have the benefit of existing infrastructure, both hard and soft.

The focus is primarily on the expansion of existing key employment locations to accommodate additional growth, including the City Centre, Docklands (North and South), Blackpool, Kilbarry, Mahon, Eastgate/Little Island, Ringaskiddy, Airport/Airport Business Park, Whitegate/Aghada, Carrigtwohill and Mallow.

New strategic employment locations to satisfy the projected increase in market and non-market services in the CASP region are identified at Tivoli, Tramore Road (north and south of the South Link), Ballincollig, and Curraheen.

The overall emphasis is on the provision of a choice of locations for investors. The initial focus will be to concentrate on the expansion of existing strategic employment locations, while at the same time to put in place the mechanisms to secure the provision of new strategic employment locations, so that they can be brought forward for development to meet market demand.

The key existing strategic employment locations within the CASP sub region are outlined in this section, as are the employment types they currently or potential could accommodate, the key planning and transport issues impact on their further development and the status with regard to current market perception.

The overall spatial distribution of strategic employment locations continues to be focused on the City and inner County Metropolitan area, aligned with existing and proposed public transport corridors, and matches as far as possible existing and expanding areas of population. Ringaskiddy and Whitegate/Aghada will be the preferred locations for large stand alone industrial uses, with a commensurate limitation on residential growth.

Generally, the main issues critical to the success of these strategic employment locations are:

- Continued availability of suitable land.
- Improved public transport services.
- Comprehensive water and wastewater infrastructure, as well as access to soft infrastructure (shops, crèches and other local services)

In considering the updated CASP Plan, it is important to review detailed projections for sub-areas as proposed in the realigned spatial plan.

The proposed realignment of spatial and land use strategy involves continuing broadly with the original CASP spatial strategy, but with amendments to take account of the reality of developments to date, the revised *National Spatial Strategy* (NSS) population targets and the potential capacities in the various areas in CASP. This spatial development strategy is presented for each sub area for the key variables of population, household formation and employment below.

3.2.1 The City

- The proposed spatial strategy for the City takes account of the fact that the City will have a set population target of 150,000 by 2020.

The revitalisation of the City is premised on the following key issues with the proposed spatial strategy for the City focusing on a number of key features as follows:

- It underpins the feasibility / potential for the delivery of future public transport proposals in the city by increasing densities.
- It already has the highest concentration of employment activity and it proposed to accommodate substantial future increases.
- It results in the promotion of a compact sustainable urban form.

- It underpins and strengthens the pre-eminence of the City in the sub region's urban hierarchy.

The delivery of Docklands, both north and south, are critical to the city achieving its projected target and to the implementation of the updated CASP Strategy as a whole. If these areas do not deliver growth, the City will have a very significant shortfall. On this basis the targets set for the City should be subject to regular review. It is also essential that the growth of other locations within the city are progressed in the short term, particularly Blackpool, the Old Whitechurch Road and Mahon, (as well as areas on the boundary of the City such as Ballyvolane and Tramore Road). This reflects the market requirements for a choice of employment locations.

The revised population and employment targets set out for the City will require a step change in terms of policy implementation with regard to higher densities and building heights within existing built up areas. In this regard, the approach adopted in locations that support higher density of development, e.g. Blackpool and the Docklands provide a valuable template for policy implementation going forward, namely the identification of key development sites within established areas, the setting out of clear development guidance for same and appropriate policies safeguarding the amenity of residents elsewhere in established suburban areas. Other policy areas that could be progressed include intervention in derelict sites, contribution to city centre site assembly and more proactive zoning provisions for expansion areas.

The original CASP goals for urban renewal remain valid including the revitalisation of older housing stock within city centre area, redevelopment of vacant and derelict sites, promoting infill development and schemes such as the Living Over the Shop Scheme. In the context of this Update there is also need to consider measures to encourage more family orientated housing as the overwhelmingly majority of new city housing development has been (and given existing trends will continue to be) apartment development. In this, policy should be orientated towards encouraging a mix of house tenures, types and sizes within any particular development. This also needs to be aligned with the need to attract high skilled employees to the City.

In addition there is an on-going need to address the issue of the provision of social and affordable housing within the city. The lack of available building land and the high cost of development in the city, has had a significant impact on the sourcing a new social and affordable units through Part V legislation. Consideration should be given to the development of innovative policies in this area, and to meet this need the inclusion of social housing in other parts of Metropolitan Cork in close proximity to the City and serviced by high quality public transport should be investigated. An over concentration of social housing in one confined area is not aligned with CASP goals and co-operation between local authorities to address this overall interest of CASP is needed.

The City's role as the engine of growth for the region is reinforced and further developed under the revised spatial development strategy. The spatial development of the City is focused on the delivery of additional population and employment growth at Docklands (North and South), City Centre and Blackpool over the remaining period of CASP. It is also considered that the development of Kilbarry and Mahon as strategic employment locations should be realised in this timeframe. These are key locations for the sustainable development of the City. Their continued development must be underpinned to the provision of high quality public transport. There is also some potential over time for employment in the Tramore Road area.

Given the challenges involved in delivering the City Docklands project, the likely timeframes involved and final delivery's bearing on not just the growth of the City but on the overall implementation of CASP, the focus on all of these strategic locations within the City would support the development of the City in line with CASP targets and reinforce its pre-eminence in the region's urban hierarchy. Growth areas would be approximate to existing services, both soft and hard infrastructure, with lower levels of investment needed to deliver development.

Given the critical importance of delivering projected employment and population growth in the Docklands to the updated spatial strategy, the early resolution of infrastructure, funding and other issues should be prioritised. In addition, given the extent of projected growth and the Dockland's role as the key location underpinning the feasibility of proposed potential rapid transit transport corridors, it is critical that the Docklands is connected to public transport modes early in the tranche 2 period.

With regard to the revitalisation of the City Centre, significant improvements have been made recently to the public realm, which have had knock on effects to its vitality and vibrancy. They have added significantly to the attractiveness of the urban environment and its visual image underpinning growth in retail, office and residential development. Building on these successes through the implementation of a number of key planning policy documents such as the Cornmarket Street Action Plan will be key to the strategy for the area in the coming years particularly with regard to mixed-use development, traffic management and enhanced pedestrian, cyclist and public transport facilities. Key redevelopment sites should not just be looked at only in terms of their potential for commercial development but their role in providing for new residential accommodation in mixed-use schemes.

In the southeast, it is proposed that Mahon should continue to emerge as a key employment location, offering new third generation office floorspace through the redevelopment and intensification of existing employment locations. The early delivery of high quality public transport to the area is a critical to this. We understand this will be considered in more detail in the forthcoming City transport feasibility study.

In the northeast, it is proposed that the Blackpool valley should build on the successful redevelopment of the Polefield, the completion of the Blackpool By-pass, the Urban Renewal Schemes and the expected opening of the Kilbarry rail station, to consolidate its position as the key development node on the Northside of the city. In this regard it has significant potential and capacity to growth as both mixed use development location that includes office, residential and business and technology uses. The City Council site on the Old Whitechurch Road should be developed early in tranche 2 to deliver a significant quantum of new housing in the area. Care however should be taken to ensure it develops as a sustainable and balanced new neighbourhood that offers a range of house types and tenures.

The development of the identified growth location of Ballyvolane is largely within the County Council administrative area but should be progressed in conjunction with the City Council as the services, public transport and infrastructure to serve it are largely within the City boundary. It is envisaged that the existing Ballyvolane neighbourhood centre would emerge as a district retail centre to serve these new neighbourhoods and existing populations in the northeast of the city. There is also potential for selective high quality mixed use high valued services employment.

The redevelopment of Tivoli, factoring in the existing rail line, also provides the opportunity to deliver increased population and employment for the City, linked to the relocation of the Port of Cork container terminal to Ringaskiddy. Tramore Road has the potential to accommodate employment and population growth, derived from changes in the types of employment and increased employment densities, as befits a location so close to the City Centre, with ease of access to the established Black Ash Park & Ride.

There is potential for employment growth in the City centre as well as the Docklands. There is significant potential for development at the eastern edge of the city centre, as well as potential for growth in services such as retailing in the retail core of the City.

A summary of the proposed population by sub area for the City as included in our proposed updated strategy is presented below.

Table 3.4: Future Population - Cork City by Area

Area	Original CASP 2020 Targets	2006 (Actual)	Updated 2020 Projections
Central Cork	9,420	8,094	11,283
Northeast Cork	26,030	22,387	24,084
Northwest Cork	27,220	26,601	30,218
Southwest Cork	37,720	37,120	39,390
Southeast Cork	35,430	25,320	45,025
Cork City	135,820	119,522	150,000

Source: Indecon/RPS analysis

It is considered appropriate that the City Council adopt a pro-active approach to the redevelopment of identified growth locations through the preparation of Local Areas Plans post the adoption of the new City Development Plan (some of these may be prepared in conjunction with the County Council). The identification of significant growth opportunities and the preparation of supportive planning policy in relation to same will be key to realising the growth envisaged for the city within the given timeframes.

Employment for the City is focused on the continued development of the City Centre and with the delivery of the effective development of the Docklands. We envisage that predominantly market services would be located primarily in the Docklands, with Mahon and Blackpool as secondary locations for such uses. The majority of the projected additional employment is therefore targeted at the south east sector of the City. Growth in the northwest sector is focused on Blackpool a and Kilbarry, whilst growth to the southwest is focused on additional job creation at CUH, CIT and UCC, the development of Wilton District Centre and Curraheen neighbourhood centre, as well as the intensification of employment uses in the Tramore Road area.

At present, the greatest areas of employment concentration are in the central and southwest areas of the city respectively. Of note is that the northeast, northwest and southwest of the City, as of 2006 had already surpassed their 2020 CASP target employment levels. A very significant growth in Southeast Cork is envisaged as part of the updated strategy. It should however be noted that these estimates do not represent upper limits on employment growth for the City and significant enhanced employment in the Docklands is envisaged post 2020. If the full potential of the Docklands is achieved faster than expected and all of the potential is realized by 2020 the employment numbers may need to be revised upwards.

Table 3.5: Future Employment Growth – Cork City by Area

Area	Actual 2006 figures	Original CASP Target - 2020 Jobs	Updated CASP Projection- 2020 Jobs
Central Cork	22,478	30,150	24,978
Northeast Cork	8,328	7,130	8,828
Northwest Cork	10,580	9,810	12,580
Southwest Cork	21,318	19,650	22,818
Southeast Cork	12,544	14,820	21,487
Cork City	75,248	81,560	90,691

Source: Indecon/RPS analysis

The strategic employment locations, both existing and those propose for Cork City are as follows;

Area	Indicative Employment Type	Key Planning Issues	Expansion/Intensification Potential
City Centre	Offices/retail/commercial	Site Assembly / Conservation/ Archaeological/ Accessibility to public transport/Servicing	Significant potential for expansion of existing economic function as identified in City Centre Strategic Report
Docklands (North and South)	Offices/business & technology/commercial	Infrastructure Deficits /Infrastructural costs and delivery uncertainty/ Accessibility/Existing use constraints	Significant potential for growth and expansion as identified in the updated Economic Development Strategy
Blackpool	Offices/ retail / distribution / business & technology/commercial	Increased accessibility by road and public transport/design and layout	Significant potential for expansion
Mahon	Offices//business & technology	Traffic congestion / accessibility by public transport/relocation of existing businesses	Significant potential for expansion / intensification / likely change in employment type to predominantly office use
Kilbarry	Business & technology/distribution / limited offices	Accessibility by Road and public transport/Provision of high quality public realm/linkages to established service centres	Significant potential for expansion
Tivoli	Offices/business & technology/commercial	Infrastructure Deficits /Infrastructural costs and delivery uncertainty/ Accessibility/Existing use constraints	Significant potential for growth and expansion as identified in the updated Economic Development Strategy
Tramore Road	Offices/distribution / business & technology/commercial	Relocation of existing uses/ Site Assembly/ Employment intensification/ accessibility by public transport	Significant potential for expansion

3.2.2 Rest of Metropolitan Cork

It is proposed that the updated overall population forecast to 2020 for the County Metropolitan area is 216,240 people or an additional 63,221 people from the 2006 actual of 153,019. It is envisaged that a total of 82,053 jobs will be required to support this population, an additional 20,595 jobs from the 2006 actual of 61,458. Most settlements will incur a natural growth in population and commensurate employment, but the major focus for this additional population and employment growth is as follows:

The original concept for the Metropolitan Cork area as advocated in CASP is carried forward into the CASP update. This essentially characterised the settlements in the immediate hinterland of Cork City as a single integrated unit, and these settlements include Ballincollig, Blarney, Carrigaline, Douglas, Glanmire, Glounthaune, Carrigtwohill, Midleton and Cobh, together with the smaller settlements in between these areas and the City.

The strategy for the County Metropolitan Area would see growth continue to be concentrated in a number of County Metropolitan towns already identified in the original CASP which have a good level of existing infrastructure, accessibility to high quality transport and approximate to existing strategic employment locations. In the context of the County Metropolitan Area, the primary locations for additional population growth are Midleton, Carrigtwohill, Cobh, Glounthaune, and Blarney. Essentially this builds and further strengthens the focus of the existing CASP Strategy on the heavy rail line to the north and east of the City. This strategy has the advantage that the majority of areas have already been identified for growth in CASP. Thus their continued growth is already substantially in line with CASP Goals. The upgraded rail commuter service to Carrigtwohill and Midleton is due to open in 2009.

However, critical to the achievement of growth and development is the identification and implementation of infrastructure programmes and the execution of Masterplans. A key issue in the continued growth of these towns will be to ensure the development of compact and sustainable urban centres in the first instance, with only additional zonings were it is appropriate to do so.

There is existing capacity in the strategic (primarily industrial) employment locations of Little Island, Ringaskiddy, Whitegate/Aghada and Carrigtwohill, with the further development of Little Island premised on the provision of high quality public transport. In Little Island, this requires an improved linkage with the existing rail station, as well as an internal bus service centred around the existing neighbourhood centre. The development of Ringaskiddy will require the provision of a high quality green route. The delivery of the commuter rail link to Carrigtwohill will enable this location to intensify its employment provision. In considering the potential for future development the major strategic site at Saleen is noted. The further development of Whitegate/Aghada reflects the proposed CHP plant, intensification of the existing refinery operation and the potential offered by industrial lands at Saleen over the lifetime of CASP to 2020.

The desirability of a second potential rapid transit corridor would appear to be best suited to those areas of Metropolitan Cork which either have already, or are likely to deliver the quantum of population to warrant such a service. Given the focus on the delivery of Docklands, together with the emerging strategic employment location at Mahon, coupled with the delivery of growth in the south and west of the City, the focus for a new high quality public transport corridor should be along an east-west axis, connecting Mahon to UCC/CIT via Docklands and the City Centre.

There is strong market demand for a new strategic employment location to the west of the City, to complement provision to the east and south, without compromising the primacy of the City Centre and Docklands. The most appropriate location for this new strategic employment location is at Ballincollig, which, coupled with additional population, could see the extension westwards of the proposed high quality east-west public transport corridor. It is considered that this corridor is the most likely to provide the critical mass of people to create the business case for a future high quality public transport route for the City sub-region. Ballincollig will also be serviced by a park and ride site to attract car-based movements into and from Macroom. This park and ride facility will be delivered after the provision of the high quality public transport link to the City. A location for the provision of science and technology facilities together with R&D focused business space linked to CIT and UCC has been identified at Curaheen on lands west of CIT.

The overall focus for County Metropolitan Cork continues to be framed in the original CASP objectives of maximising the use of the rail corridor to the north and east of the City, but with the added potential of delivering a high quality public transport corridor to the south and west of the City, linking Mahon via Docklands to the City Centre, Wilton, CUH, UCC and CIT and on to Ballincollig.

The planned delivery of a substantial new residential neighbourhood at **Midleton** will see the town increase in population to 23,429 people by 2020. Planning policy strongly supports the retention of metropolitan town's identity distinct from the city. The town has an important tourist function. A Special Local Area Plan for Midleton was adopted in September, 2005. Future employment growth for the town is focused on retail and commercial development to ensure a self-sustaining service-based town into the future, with continued investment in the town centre required. The town benefits from current bus based public transport links with City, and will also benefit from the new rail link connecting the town to Cork City Centre. The town benefits from good road access and connectivity via the N25 and national roads network. Recent growth levels on N25 corridor are causing peak time capacity concerns. Phase 1 of the Midleton northern relief road has commenced. Phases 2 and 3 of the Northern Relief Road are also needed in order to secure the proper planning of the town. Local road access network improvements will be required to provide for safety, circulation and soft modes mobility. From an environmental perspective, the town suffers from flooding to the south, constraining growth in this direction. The focus for residential development will be to the north-west of the town in the defined Waterrock neighbourhood. The town benefits from the County Regional Broadband Programme.

The CASP Update is proposing a very significant increase in population for Midleton which is targeted to increase from 10,315 to 23,429. This reflects a number of factors. With the advent of the rail line to Midleton there is potential for the area to develop in a sustainable manner, and one which takes account of the strategic location of Midleton. Its strategic assets include the presence of a commercial centre, the current mix of industry and services in the area, its strengths in food production and tourism, and also the access to education which Midleton offers.

Under the updated strategy **Blarney** will see an increase in population to 23,793 people by 2020, focused on the new residential neighbourhood around the proposed new rail station, with additional limited growth in the village to

consolidate and support the tourism and existing service base. Provision has been made for the new residential neighbourhood around the rail station in the Blarney-Kilbarry Special Local Area Plan 2005. On employment the focus is on augmenting the tourism and service base there, as well as additional commercial and enterprise activities to support the expanding population. Progress on the implementation of the masterplan for the major new residential area at Stoneview is slow, although the recent permission for the infrastructural works should accelerate the delivery of new residential areas there. Blarney benefits from good road access, due to be further improved with the proposed Northern Ring Road. The new rail station will enhance the connectivity of the area to the major employment node of the City. A Park and Ride facility in conjunction with the new rail station is included in the proposed development. There is significant potential to deliver social inclusion, with additional social and affordable housing and public transport access. There are a number of environmentally sensitive areas, including Blarney Bog, and the protection of views to the Castle is important. Groundwater is locally vulnerable to contamination. There are a number of areas subject to flooding in the existing village centre. There is a requirement for significant hard and soft infrastructure including water and wastewater, as well as water storage, schools and recreational and amenity areas to complement the growth in population. The completion of identified improvements to the existing water supply scheme and the planned wastewater treatment upgrade must proceed imminently.

Monard is subject to detailed assessment to investigate the potential for a significant new population to 2020 of 11,153 people in the Monard / Rathpeacon and Whitechurch area. Provision has been made for this settlement in the Blarney-Kilbarry Special Local Area Plan 2005. This is less than included in the original CASP strategy but it is assumed in this update that the full potential of Monard is not achievable by 2020. There are plans to expand the Cork Harbour and City scheme to service Monard. It is envisaged that the trunk main to service Monard could be laid along the route and construction of the western section of the proposed North Ring Road in advance of this construction. The projection of 11,153 people in 2020 represents 75% of the overall potential development in the Monard area. It is envisaged that the remaining 25% capacity of the area will develop beyond 2020.

Under the updated CASP the continued development of **Carrigtwohill** to a population of 20,303 people is predicated on the provision of the new rail line from Midleton to Cork City, and with the delivery of the proposed masterplan for the lands around the new rail station. There is continued growth expected in the settlement's strategic employment function. A Special Local Area Plan has been adopted for the town in September 2005. Additional focus on the provision of significant hard and soft infrastructure, including self-sustaining retail and service functions is required. The town benefits from good road connections onto the N25, although there are capacity issues at peak periods. Local road infrastructure needs to be improved. The protection of views of Barryscourt Castle from the N25 is important. The town benefits from significant water capacity, although the existing wastewater system is overloaded. Carrigtwohill lies within an area of scenic landscape, affording excellent opportunities for a high quality living environment.

Cobh has significant potential as the tourism base for East Cork, with a number of significant attractions, further enhanced by its cruise terminal, and the potential for an iconic tourism product at Spike Island. It benefits from rail access, although road infrastructure is poor. Typography and heritage constraints limit additional intensification of the town centre, although an urban design strategy is proposed which should address some of these issues. Cobh offers significant potential for a high quality of life. Plans are being progressed to improve the connection from Great Island to the N25. The town has the opportunity to increase its residential population further to sustain and deliver additional retail, commercial and service functions to support the resident and tourist populations. The most appropriate location for this is to the north of the town along the Ballynoe Valley, which will consolidate the commercial function established at Ticknock. Growth here should be linked to the provision of a new rail station at Ballynoe and should have connectivity to the town of Cobh. There is the potential to develop the former IFI site at Marino Point for high density mixed uses, however, as acknowledged in the Midleton Electoral Area Local Area Plan, given the existing infrastructure, as well as the presence of a Seveso use, the site may be suitable to be developed for industrial or port-related uses. There is water capacity, but the delivery of the Cork Lower Harbour sewerage scheme is required to provide wastewater for the town. Additional soft infrastructure is required to service the town's growing population. The town benefits from the County Regional Broadband Programme. The town has capacity for a growth in population to 16,370 people by 2020.

Glounthaune's location on the heavy rail line to Cork City means it should benefit from limited population growth based around the more level lands to the north of the existing rail station, on the old Cork-Waterford road, with the potential for some integrated social and affordable housing in line with the proposed population growth to 6,883 people to 2020. Glounthaune benefits from good road access.

Carrigaline is envisaged to grow to its original CASP target of 14,280 by 2020, following its significant growth in recent years. The focus is on the consolidation of the town centre, with additional retail/services/commercial and residential uses, taking into account the flooding potential of the town, the high amenity and environmental value along the Owenaboy River corridor, as well as the provision of substantial soft infrastructure to support the town's population, including recreational and amenity areas. The delivery of the relief road to the west of the town will be required. Traffic congestion in the town will have to be addressed, and in this regard a transport plan for the town is being prepared by the County Council. The town will link into the propose Lower Harbour Sewerage scheme, and future water supply will be provided from the Cork Harbour and City scheme. The town benefits from the County Regional Broadband Programme. The town suffers from a poor public transport infrastructure.

Ballincollig is considered to have the potential to become a strategic employment location over the lifetime of CASP to 2020, with a self-sustaining and distinct identity from the City. Future development areas are focused on the south of Ballincollig to the Ballincollig bypass, with the establishment of a new business park. The town has experienced significant expansion on recent years with a significantly improved town centre offering and additional employment uses that should be expanded further. The future growth of Ballincollig as a strategic employment location has to be considered in the context of the provision of high quality public transport link to the City and the provision of such a link must be made in any future planning framework for the town. The Green Route Corridor is in progress in the City via Carrigrohane Road. The town benefits from good road infrastructure, and has benefited considerably from the completion of the Ballincollig Bypass, by traffic difficulties are emerging again. There is evidence of flooding issues to the North of the town along the River Lee, which is high quality scenic landscape. Ballincollig Regional Park is an excellent local resource, although there are opportunities to improve the provision of further soft infrastructure.

An upgrade to the Cork Harbour and City water supply, which services Ballincollig, will be required. Independent storage for the town is at preliminary planning stage. The upgrade of the wastewater treatment plant is at construction stage. A population to 33,330 people is envisaged to 2020, with a corresponding increase of 4,114 jobs to a total of 12,800 jobs by 2020.

The CASP update also identifies additional population growth in Ballyvolane and Douglas/South City Environs. Ballyvolane is considered to offer the most potential for additional housing, in particular private sector housing, and associated social and affordable housing, to assist in the achievement of the desired CASP goal to rebalance the northside of the City, located adjacent to the strategic industrial area of Kilbarry and based around a new district centre on the Ballyhooley Road, with the existing Dunnes Store, Lidl and other essential services.. The further development of Ballyvolane for a population of 13,495 people to 2020 is predicated on the potential to deliver a high quality public transport corridor connecting the north of the City to the City Centre, and the requirement to plan the area jointly between Cork City and Cork County Councils.

The future focus of the Douglas/South City Environs area could be centred around the redevelopment of the Tramore Road area for more employment intensive uses, as well as residential development, on the south of the South Ring Road, and the delivery of a high quality public transport connecting the Airport and the Airport Business Park to the City Centre. The potential of this area warrants further investigation as its development may entail the relocation of some of the existing business uses. It is noted that a Special Local Area Plan for the Airport is being prepared by Cork County Council, which will take into account the potential for enhancing this strategic employment location for additional jobs to service the Airport directly as well as supporting further business development in the Airport Business Park in the period to 2020. The development node in the County area of Tramore Road reflects the strategic importance of the airport corridor and its development will achieve consolidation of intensive employment and additional residential uses in conjunction with the development of the City side of Tramore Road, and as with Ballyvolane, this development node will require co-ordinated development between the City and the County.

In all other locations of the County Metropolitan area, there is potential for on-going population growth in **Crosshaven/Myrtleville, Monkstown/Passage West** and **Glanmire/Riverstown**. In particular, the future development of Whitegate/Aghada area for industrial purposes is identified.

Of the 216,240 people targeted to live in the rest of metropolitan Cork by 2020 it is anticipated that the majority of population growth will occur in the Carrigtwohill & Midleton hinterlands, Midleton Town, Ballincollig, Ballyvolane, Blarney, Monard and Cobh. Ballincollig and Ballyvolane are now proposed to take significant growth which was not envisaged as part of the original CASP. A breakdown of the proposed population for the rest of the Metropolitan Cork is presented in Table 3.6.

Table 3.6: Future Population - Rest of Metropolitan Cork

Area	CASP 2020 Target	2006 (Actual)	Updated 2020 Projection
Ballincollig and its Hinterland	26,050	26,419	33,330
Ballyvolane	7,230	7,118	13,495
Blarney and Hinterland	14,720	16,043	23,793
Carrigaline and Ringaskiddy	14,280	12,677	14,280
Carrigtwohill and Midleton Hinterland	17,220	9,685	20,303
Cobh Town	14,570	12,880	16,370
Crosshaven/Myrtleville	4,010	3,061	4,010
Douglas/South City Environs	25,220	27,716	30,102
Carrigaline Hinterland	3,140	3,985	4,184
Glanmire / Riverstown	5,110	5,583	5,862
Glounthane and Little Island	5,340	6,555	6,883
Midleton Town	21,010	10,315	23,429
Monard/Rathpeacon/Whitechurch	14,870	2,183	11,153
Monkstown and Passage West	5,740	5,650	5,740
Whitegate/Aghada	2,200	3,149	3,306
Metropolitan Cork	180,710	153,019	216,240

Source: Indecon/RPS analysis

It is anticipated that the growth in jobs out to 2020 in the Rest of Metropolitan Cork will be strongest in the areas of Blarney, Little Island, Carrigtwohill, Ballincollig, Tramore Road, Ringaskiddy, Whitegate and Saleen. Indicative figures for estimated employment by sub area included for the rest of Metropolitan Cork are presented in table 3.7 but some flexibility in these numbers may be required depending on economic and other development. Additional employment in Ballyvolane reflects the strategic employment location of Kilbarry in this area.

Table 3.7: Indicative Future Employment Growth – Rest of Metropolitan Cork

Area	Original CASP Target – 2020 Jobs	2006 (Actual) - Jobs	Updated CASP Projection 2020 Jobs	Growth in Jobs to Updated 2020 Projection
Ballincollig and its Hinterland	12,800	8,686	12,800	4,114
Ballyvolane & Glanmire/Riverstown	5,660	3,402	5,660	2,258
Blarney and Hinterland	11,410	5,107	7,457	2,350
Carrigaline and Ringaskiddy	8,430	7,816	10,316	2,500
Glounthaune/ Little Island/Carrigtwohill/ Middleton Hinterland	9,080	12,760	14,934	2,174
Cobh Town	5,600	3,380	4,380	1,000
Crosshaven/Myrtleville	2,260	426	526	100
Douglas/South City Environs	14,100	13,234	14,734	1,500
Middleton Town	8,370	4,702	6,202	1,500
Whitegate/ Aghada	1,090	743	2,743	2,000
Monard/Rathpeacon/ Whitechurch	N/A	394	1,394	1,000
Monkstown/Passage West	N/A	806	906	100
Rest of Metropolitan Cork	78,750	61,457	82,053	20,596

Source: Indecon/RPS analysis

The strategic employment locations, both existing and those proposed for the Rest of Metropolitan Cork are presented below.

Area	Indicative Employment Type	Key Planning Issues	Expansion/Intensification Potential
Little Island	Business & technology/Offices /Distribution	Accessibility by public transport/ impact on existing residential amenities/Provision of high quality open space and amenities for workers/Consolidation of localised services	Potential lands for expansion to east, redevelopment and intensification of existing lands
Ringaskiddy	Industry	Accessibility by public transport / impact on existing residential amenities/Provision of high quality open space and amenities for workers/Provision of localised services	Intensification and expansion of Port currently in the planning process. Significant additional lands available for development for port- related/ other industrial use/office based industry
Airport/Airport Business Park	Offices/business & technology/ distribution	Impact on city centre docklands capacity / accessibility by public transport	Potential expansion constraints (Flight path). Special Local Area Plan in process of preparation.

Whitegate/Aghada	Industry	Accessibility by public transport / impact on existing residential amenities/Provision of high quality open space and amenities for workers/Provision of localised services	Significant additional lands available for development for industrial use, including lands at Saleen
Carrigtwohill	Business & technology / industry / distribution / Offices/Retail / Commercial	Accessibility by public transport and local roads infrastructure	Significant lands zoned for employment uses which are yet to be developed
Curraheen	Offices/business technology	& Accessibility by public transport and local roads infrastructure/Flooding Relief	Lands identified in the Curraheen Local Area Plan
Ballincollig	Offices/business technology/retail/distribution	& Accessibility by public transport	Significant potential for expansion
Tramore Road	Offices/distribution / business & technology/commercial	Relocation of existing uses/ Site Assembly/ Employment intensification/ accessibility by public transport	Significant potential for expansion

In addition to these strategic employment locations Douglas is an additional employment location which holds brownfield development potential.

3.2.3 The Ring Towns and Rural Areas

The focus for significant development of the Ring Towns in the updated strategy is on **Mallow**, as the hub town, reflecting its strategic population growth projections to 20,000 people by 2020, and reflecting the potential for sustainable commuting patterns and intensification of development to be generated from its existing rail access, as well as planned infrastructural improvements, including the Atlantic Gateway Corridor. The proposal being advanced for the Greencore former sugar factor site have the potential to encourage a significant step-change in the perception of Mallow as a business location.

Area	Indicative Employment Type	Key Planning Issues	Expansion/Intensification Potential
Mallow	Distribution / Retail/Commercial/ Limited office	Accessibility / infrastructure deficits / environmental issues	Significant lands zoned for employment uses which are yet to be developed. Strong potential within town centre also

All other Ring Towns will experience population and commensurate employment expansion, but the focus will be on the urban areas of Ring Towns, countering the growth of the rural areas that has occurred since the adoption of CASP.

County Council analysis undertaken of the preparation of the draft County Development Plan with regard to one off housing indicates:

“Greenbelt policies are generally working in controlling the spread of one off housing in areas under strong urban influence. Approximately 81% of new populations in Metropolitan areas have been accommodated in urban locations.”

The pace of development of one-offs in the rural housing control zone is very significant, and a significant proportion (1/3) of new one offs in the County are occurring outside this zone but within the CASP boundary. Only 36% of new populations in the Ring area have been accommodated in urban locations. This is not consistent with the key CASP Goal of reinforcing the Ring Towns function and role within the sub-region and this is addressed in the updated strategy.

In translating the targeted numbers for the Ring Towns and Rural areas into development targets it would be appropriate for there to be some flexibility in the targets, but the objective should be to ensure the overall population for Ring Towns and Rural areas to be confined to the levels specified and for the focus to be placed on Ring Towns to ensure sustainability.

Table 3.8: Future Population - Ring Towns and Rural Areas

Area	CASP 2020	2006 (Actual)	Updated CASP 2020 Projections
Bandon Town	9,460	9,174	9,460
Bandon Hinterland	8,100	11,289	11,402
Macroom Town	5,080	3,407	5,080
Macroom Hinterland	8,330	9,701	9,798
Mallow Town	17,430	11,211	20,000
Mallow Hinterland	8,970	10,783	10,891
Fermoy Town	9,410	6,551	9,410
Fermoy Hinterland	10,860	12,452	12,577
Youghal Town	9,650	7,167	9,650
Youghal Hinterland	9,410	10,823	10,931
Kinsale Town	5,190	6,117	6,147
Kinsale Hinterland	4,730	6,380	6,414
Ring Towns and Rural Areas	106,620	105,055	121,760

Source: Indecon/RPS analysis

* Mallow was provisionally allocated a population Target of 20,000 as a hub Town under the National Spatial Strategy

Within the Ring Towns and Rural areas it is anticipated that the vast proportion of the growth in employment will occur in Mallow Town with further considerable growth in Fermoy town also. Each of the other sub areas will display moderate job growth to support both the existing and proposed populations.

Table 3.9: Future Employment Growth - Ring Towns and Rural Areas

Area	Original CASP Target - 2020 Jobs	2006 (Actual) - Jobs	Updated CASP Projection 2020 Jobs	Growth in Jobs to Updated 2020 Projection
Bandon Town	3,590	4,285	4,785	500
Bandon Hinterland	3,530	3,431	3,530	100
Macroom Town	1,710	1,837	2,337	500
Macroom Hinterland	3,540	2,018	2,518	500
Mallow Town	6,070	4,866	8,895	4,029
Mallow Hinterland	4,150	2,688	3,188	500
Fermoy Town	3,230	3,968	4,468	953
Fermoy Hinterland	4,230	3,458	3,958	500
Youghal Town	3,360	2,407	3,360	500
Youghal Hinterland	3,720	2,006	2,506	500
Kinsale Town	2,100	2,108	2,308	200
Kinsale Hinterland	1,830	1,133	1,333	200
Ring Towns and Rural Areas	41,060	34,204	43,186	8,982

Source: Indecon/RPS analysis

A number of the Ring Towns have secured impressive growth since CASP was published and have already exceeded their development targets. Some other Ring Towns have not as yet met their original CASP targets and these will need to secure significant development in order to achieve CASP targets. The targets for Mallow are to be increased to 20,000 in line with achieving Hub town status. This will require supportive investment in transport and other infrastructure. The development of the Ring Towns will be consistent with overall CASP development priorities.

3.3 Housing Location

In preparing this Update, account has been taken of the implications for household formation that are implied by the new revised CASP population targets as outlined above. However as discussed below, the original CASP projections for household size have been adjusted in light of the proposed Cork Housing Strategy. The targets presented below utilise these revised density figures taking a CASP area average of 2.41 persons per household by 2020. This represents a lower average density than that which is currently the case; 2.64. The application of this lower density figure by 2020 is used in order to account for likely future trends in household formation patterns.

There is significant uncertainty as to the appropriate long-term assumptions to use for household size. This is influenced by developments in the housing market, investor expectations, social trends and the availability of credit as well as incomes and confidence levels. The level of uncertainty is reflected in the fact that even since CASP was prepared; views on the appropriate long-term household size have changed significantly. In the targets presented in the tables overleaf we believe it is appropriate to use lower projected average household size of 2.41 by 2020, which was included in the draft Housing Strategy. We would, however, highlight the degree of uncertainty on this issue and this may need to be monitored in subsequent CASP updates. In particular, a slowing of the economy, reduced expectations of capital growth in housing values and more restricted credit than when the draft Housing Strategy was proposed, may impact on future household size.

The City

Using sub area population targets for 2020 with the 2.41 average density figure applied, Table 3.10 outlines projected household targets within the City for 2020. Relative to current levels it is now anticipated that the greatest growth in household numbers will occur in the south east of the City where the number of households is projected to increase by almost 10,000 by 2020. Growth in household formation is also envisaged in southwest and north east Cork.

Table 3.10 - Updated Household Formation Targets - Cork City

Area	Original CASP 2020 Target - Households	2006 (Actual) - Households	Updated 2020 Targets - Households
Central Cork	3,570	3,228	4,682
Northeast Cork	9,860	8,278	9,993
Northwest Cork	10,310	9,764	12,539
Southwest Cork	14,290	13,743	16,344
Southeast Cork	13,420	8,958	18,683
Cork City	51,450	43,971	62,241

Source: Indecon/RPS analysis

Rest of Metropolitan Cork

Again applying the average density figure of 2.41 to the revised population targets for 2020 it is anticipated that there will be very significant growth in household formation in the areas of Monard/Rathpeacon in particular Ballincollig and its hinterland, and in Middleton Town to a somewhat lesser extent.

Table 3.11 – Updated Household Formation Projections – Rest of Metropolitan Cork

Area	Original CASP 2020 Target - Households	2006 (Actual) - Households	Updated 2020 Projections - Households
Ballincollig and its Hinterland	9,870	8,656	13,830
Ballyvolane	2,740	2,271	5,596
Blarney and Hinterland	5,580	5,091	9,873
Carrigaline and Ringaskiddy	5,410	4,260	5,926
Carrigtwohill and Midleton Hinterland	6,730	3,326	8,426
Cobh Town	5,520	4,605	6,792
Crosshaven/Myrtleville	1,520	1,145	1,664
Douglas/South City Environs	9,550	9,217	12,490
Carrigaline Hinterland	1,190	1,221	1,736
Glanmire / Riverstown	1,940	1,745	2,434
Glounthane and Little Island	1,820	2,064	2,856
Midleton Town	7,960	3,641	9,722
Monard/Rathpeacon/ Whitechurch	5,630	667	4,628
Monkstown and Passage West	2,170	1,971	2,382
Whitegate/Aghada	830	1,009	1,371
Metropolitan Cork	68,460	50,889	89,726

Source: Indecon/RPS analysis

The Ring Towns and Rural Areas

Using the same approach applied to both the City and Metropolitan Areas above, in relation to the Ring Towns and Rural areas, it is now anticipated that Mallow town will experience a doubling in its number of households by 2020, with moderate growth in household formation also expected to occur in Youghal Town, Fermoy Town and Bandon Hinterland.

Table 3.12 - Updated Household Formation Projections - Ring Towns & Rural Areas

Area	Original CASP 2020 Target - Households	2006 (Actual) - Households	Updated 2020 Targets - Households
Bandon Town	3,590	3,191	3,925
Bandon Hinterland	3,070	3,615	4,731
Macroom Town	1,900	1,244	2,108
Macroom Hinterland	3,160	3,145	4,068
Mallow Town	6,610	4,125	8,299
Mallow Hinterland	3,400	3,470	4,520
Fermoy Town	3,570	2,343	3,904
Fermoy Hinterland	4,120	4,143	5,218
Youghal Town	3,660	2,619	4,004
Youghal Hinterland	3,570	3,640	4,536
Kinsale Town	1,970	2,169	2,551
Kinsale Hinterland	1,790	2,084	2,661
Ring Towns and Rural Areas	40,440	35,788	50,525

Source: Indecon/RPS analysis

3.4 Additional Floorspace and Associated Land Requirements

The estimated net increase of 45,021 additional jobs required to support the projected increase in population in the CASP region necessitates additional floorspace and a corresponding land take. It is estimated that an additional 1,175, 616m² of floorspace will be required to 2020, equating to an additional 286.11 hectares (706.99 acres) of land.

An estimate of required floorspace and land requirements to meet the needs of updated strategy is presented in the table overleaf. The figures should be seen as indicative and will depend in part on the composition of economic activity, as different market segments are likely to have differing space requirements.

Table 3.13 Employment: Indicative Built area and Land use requirements 2006-2020*

Type	Indicative Jobs	Indicative Floorspace m ²	Indicative Site Coverage	Ave. height (storeys)	Land Requirement (ha)
Office	16,085 (35.7%)	514,720	40%	3	42.89
Business & Technology	9,087 (20.2%)	290,784	25%	2	58.16
Distribution	2,698 (6%)	134,900	20%	1	67.45
Industry	6,918 (15.4%)	235,212	20%	1	117.61
Total	34,788	1,175,616			286.11

Source: Indecon/RPS analysis

Note: * This table represents an update of Table 6.4 of the original CASP 2001. It is based on the projected net increase of 45,021 jobs. Office is defined as general offices, headquarters, and back-offices. Business/technology includes office-based industry, small and medium-sized businesses, business-to business services, and R&D activities; distribution includes distribution, warehousing and storage; industry includes large-scale stand alone industry as well as small and medium scale production. Office floorspace is based on a factor ranging from 20m²/job to 34m²/job and this also applies to business/technology floor space. The range is indicative only and reflects the different levels of occupancy rates that can arise in the market. Distribution floorspace is based on 50m²/job; and industry floorspace is based on 34m²/job. These jobs to floorspace ratios are assumptions and therefore the floorspace and resultant land requirement figures are indicative only. Flexibility is required in their application, and they should not be seen as a cap. The actual delivery of floorspace and the resultant land requirement will be determined by economic and employment growth. The remaining jobs are retail/commercial/local services jobs, which we estimate to be 10,224, or 22.7% for the CASP area – an indicative floorspace allocation for retail/commercial/local services is not included in the floorspace calculations in this table.

It is proposed to locate this floorspace as follows:

Offices

For the purposes of this update, offices are defined as general offices, headquarters, and back-offices. A total of 514,720m² office floorspace is required to 2020, the majority of which will be high quality large footprint general offices headquarters and back office uses. The primary locations for these large footprint offices are Cork City Centre, Docklands, Mahon, Blackpool, Eastgate/Little Island, Airport Business Park, Carrigtwohill, Ballincollig and Mallow. These large footprint offices will typically be either stand alone or part of a mixed-use development, and could also be located in business parks. Limited office uses are appropriate at all other strategic employment locations, including Kilbarry, Tivoli, Tramore Road and

Curraheen. Local office uses are appropriate in all other Metropolitan and Ring Towns in the CASP area.

The City Centre and Docklands are the principal new office locations for the CASP region, but it is also necessary to facilitate office development in the suburbs, edge of City locations and elsewhere in the CASP region. The City Centre/Docklands market is different to what is being produced and should be developed and delivered in the suburban market and elsewhere. There are different sectoral characteristics and requirements and there is also a significant difference between the cost in the City/Docklands environment as opposed to suburban and other locations. There are two distinct markets in terms of office space and for some sectors price is a significant factor in terms of general office use and office based economic activity.

Business and Technology

For the purposes of this update, business/technology uses include office-based industry, small and medium-sized businesses, business-to business services, and R&D activities. A total of 290,784m² business & technology floorspace is required to 2020, equating to a land requirement of approximately 58ha (144 acres). There are a number of appropriate locations for these uses across CASP, with Docklands, Blackpool, Mahon and Kilbarry the primary City locations, and Eastgate/Little Island, Airport/Airport Business Park, Carrigtwohill, Curraheen and Ballincollig the primary County Metropolitan Cork locations. Mallow is the most suitable Ring Town location for these uses. Other suitably-scaled business and technology uses are appropriate in all other Metropolitan Cork towns and Ring Towns.

Distribution

For the purposes of this update, distribution uses include distribution, warehousing and storage. A total of 134,900m² distribution floorspace is required to 2020, equating to a land requirement of approximately 67ha (167 acres). There are a number of appropriate locations for these uses across CASP, with Kilbarry and Tramore Road the primary City locations, and Eastgate/Little Island, Airport/Airport Business Park, Carrigtwohill, Ballincollig and Tramore Road the primary County Metropolitan Cork locations. Mallow is the most suitable Ring Town location for this use. Other

distribution uses are appropriate in all other Metropolitan Cork towns and Ring Towns.

It is also envisaged that CASP support the effective development of retailing and in this context it is noted that the CASP Update has been prepared in parallel to the Draft Retail Strategy 2008, which set out the retail hierarchy for Cork City and County. The provision of sufficient convenience and comparison retailing in growing residential areas will be an important issue for the implementation of CASP.

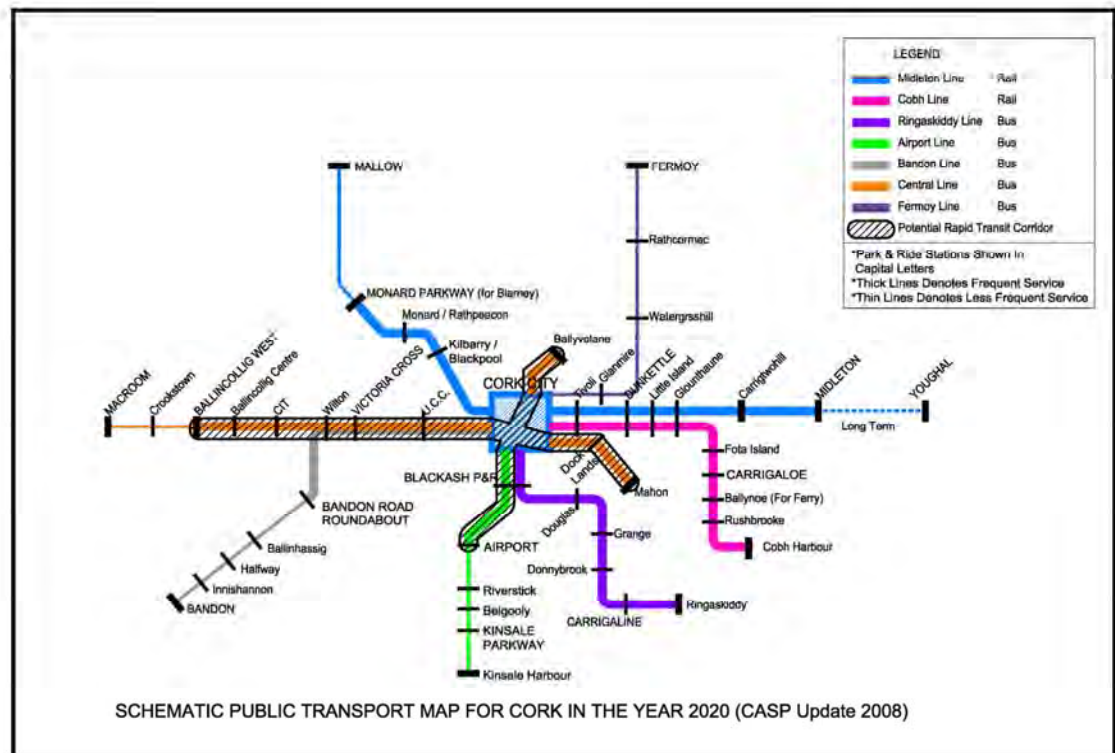
Industry

For the purposes of this update, industry includes large-scale stand alone industry as well as small and medium scale production. A total of 235,212m² industrial floorspace is required to 2020, equating to a land requirement of approximately 117ha (289 acres). The appropriate locations for new large-scale industrial uses include Ringaskiddy, Whitegate/Aghada, and Carrigtwohill. Smaller scale industrial uses are suitable in the remaining Metropolitan Towns and Ring Towns.

3.5 Front Loading of Infrastructure and the Integrated Transport System

In the context of the review of progress to date, it is clear that, despite some notable achievements, there has not been the required step change in the level of shift in transport modal shares towards public transport. The transportation plans must also be supported by the spatial strategy. This is particularly important given that the existing CASP traffic model suggests that by around 2010, roads all around the City Centre will be at capacity in the peak hour suggesting that there is a little spare capacity available going forward in terms of peak hour traffic using routes into the City Centre. However, the Government's NSS spatial targets envisage significant additional population for CASP. To accommodate this, in addition to a refocusing of the spatial strategy, two key challenges will be the front-loading of investment and the creation of the Integrated Transport System. The figure below provides an illustrative outline of the proposed public transport system for CASP by the year 2020.

Figure 3.5: Schematic Public Transport Map for Cork in the Year 2020



Source: RPS

The CASP transport strategy is considered to offer a best practice framework of land use and transport integration allied with a policy of customer focused strategies for the planning design and operation of the transport system incorporating high quality of integration of facilities and high quality of integration and provision of information to the customer to assist them in making the best modal choices for their journeys. It inherently includes sustainable travel and transport principles and includes specific references to many of the key issues and terms that have become ubiquitous in the evolving debate on sustainable travel and transport.

CASP is cited in the recent Department of Transport Public Consultation document (March 2008) as a good example in best practice integrated land use and transport planning.

Nonetheless in recent years some new themes and issues have come more into focus at a national and international level which require consideration of the appropriate adjustment of emphasis at a policy and at an implementation level in the CASP Update.

Principally these are driven by the issues of:

- Sustainability.
- Climate Change.
- Reduction in Carbon (CO₂) Emissions.
- Energy Conservation.

The import of these issues in the context of the CASP Update is to recognise that the CASP Strategy is the correct policy response to these issues at a regional level and to recognise at both regional and local level the importance of redoubling efforts to implement the strategy in order to achieve the desired outcome which is to direct and manage growth in a sustainable manner.

There is little prospect however that CASP Strategy can be fully achieved without improvements in transportation. Whilst increases in public transport services and routes have been introduced, bus patronage levels in the AM journey to work period are not rising, whilst car traffic growth has exceeded forecasts. However the welcome increase in overall bus patronage is noted. Also of note is that a number of important transport initiatives, policies and investments are underway including the Green Routes initiative and the reopening of the Midleton Rail Corridor and these will impact on outcomes. The approach to the provision of transport infrastructure and services in the CASP Strategy should be reinforced by a policy emphasis on implementation along of the following key themes:

- Sustainability.
- Mobility, Accessibility and Connectivity.
- Integration.
- Modal Choice
- Public Transport Corridor Development.
- Soft Measures including better information and communication of service offers
- Parking Policy Management.
- Delivery of integrated local infrastructure packages to support major investments.
- Strengthened dedicated integration structures and implementation resources.

Of all these themes the theme of integration stands out as being the most critical to the implementation of CASP from land use planning to parking management to the delivery of transport information and services.

3.5.1 An Integrated Transport System

A modern, efficient economy needs a modern, efficient transport system to allow the easy movement of people and goods on a daily and ongoing basis.

An integrated transport system means that all elements of the planning, design and operation of the transport system from roads, car parks and cycle lanes to buses, bus stops and train stations are coordinated so that the end user, be it as the passenger, driver or cyclist, has an optimal range of choices for each journey and that each journey can be made easily and without undue impediment or penalty from door to door. The Vision for Cork sees the City, the Metropolitan Area, the Ring Towns and the rural areas as having such an integrated transport system within the timeframe of the study. The modes of transport that make up the integrated system may include road, rail and rapid transit which may include light rail transit (LRT) and bus rapid transit (BRT), bus, ferry, cycling, motorcycling and walking. Other modes may be included in the future if and when their use and development is required in Cork.

3.5.2 Planning and the Integrated Transport System

The key to the integration of the transport system is that the planning for the provision of services for all modes is co-ordinated by and between the respective responsible agencies. For the benefits of this level of integration to be maximised, the whole transport planning process must be closely and directly linked with the spatial and land use planning process so that demand for transport services can be managed at a strategic level and that economies of scale are provided for major investments.

A good example of integrated planning will be the development of a central public transport interchange at Kent Station/Horgans Quay. The provision of an appropriate public transport interchange at Kent Station /Horgan's Quay provides many strategic benefits. Other locations for public transport facilities may be considered in order to meet the total public transport service requirements. The integration of the public transport services and non car modes of travel will be given a special prominence in the planning of the integrated transport system.

The provision and management of roads, parking and facilities for private cars and road based transport must be carefully managed and monitored so that road access is given an appropriate role in the integrated system without compromising, for example, the strategic role of national trunk routes for access to the port and the airport. Equally, consideration should also be given to the provision of dedicated public transport corridors as part of the development of the major orbital and radial routes on the approaches to the City.

It must be recognised that different levels of integration and service provision are possible and practical in the different parts of the Study Area, but the approach and philosophy must be the same. In the urban areas there will, for example, be great emphasis on the provision and use of frequent public transport services. The scope for provision and indeed the demand for services in rural areas will be quite different. The approach to reducing car dependency reflects the differing circumstances and needs of different parts of Cork. It recognises that, in some areas, road transport and car ownership will remain a necessity for many communities, businesses and visitors, whereas in the urban area a major effort to redress car dependency is urgently needed.

In order to reinforce the local authorities capacity to deliver the CASP Strategy on the ground there will be a need to provide strengthened integrated resourcing, including dedicated technical staff in the areas of transport planning and monitoring. The two authorities will need to be complemented by dedicated resource commitments from other key stakeholders including Bus Eireann, Iarnrod Eireann and National Roads Authority and this will need to be supported by the Departments of Transport and Environment Heritage and Local Government. Strong consideration needs to be given to allocating a dedicated resource to marketing and communicating the vision and benefits of the integrated transport system to the wider public. How to best address these resource issues should be considered by the local authorities.

3.5.3 Integrated Transport Planning

The integrated transport system will be best implemented by a balance of infrastructure measures, policy initiatives and active management initiatives that are necessary to integrate decision making across key stakeholders in the planning, design and operation of the transport system.

It is intended that an Integrated Transport System will include the following infrastructure measures:

- High Quality Rail Commuter Services.
- Quality Bus Services in Dedicated Bus Corridors known as the Green Route Corridors
- Rapid transit corridors with consideration for the most appropriate technology for each corridor including Bus Rapid Transit and Light Rail Transit
- Integrated Ticketing , Integrated timetabling and public information systems, Improved Stations and Bus facilities
- High Quality Interchange Facilities between road, rail rapid transit and bus including facilities for cyclists and pedestrians
- Park and Ride Strategies.
- High Quality Road Access on National Routes including development of key strategic interchanges and associated strategic access links to designated development nodes
- High quality road network including the completed ring road and its key interchanges to provide accessibility and connectivity to the Port and Airport from all areas of CASP
- A co-ordinated Parking Policy between local authorities that supports the key goals of CASP including an appropriate and Managed Supply of Car Parking in each urban settlement in Metropolitan Cork.
- Traffic Management and car restraint in the city, Metropolitan and key urban areas to complement public transport provision.
- Local Area Transport Plans including Plans for rural areas.
- Mobility Management Plans for Large Employers and large traffic generating locations. and
- Large Developments to be contingent on Public Transport provision to support the achievement of a high modal share for non car modes

The benefits of the proposed development of an Integrated Transport System outlined above include improving the mobility, accessibility and connectivity of areas where employment, services, recreation and leisure facilities are available. An integrated transport system offers a choice of transport mode which will empower people by giving them the freedom to make more and new choices in the management of their daily lives. The global time savings achieved by a better management of the transport network will translate into a wide range of benefits including improved access to health and social services, for example, or improved access to leisure opportunities. All these improvements in the range of people's daily choices will lead to a real and perceptible improvement in the individual and community quality of life for the people of Cork.

Developers and employers including major institutions and major traffic generators will be required to implement Green Commuter Plans, also known as Mobility Management Plans, which must actively encourage the use of non car modes including bus, train, rapid transit, car sharing, cycling and walking for both travel to work and other work based trips. A sample Green Commuter Plan will be included in the authorities development plans. A range of measures to improve traffic conditions will be encouraged, which could include:

- Piloting alternative school opening hours at key locations;
- Establishing initiatives such as Demand Responsive Transport and Car clubs; and
- Piloting a number of walking to school initiatives.

These benefits will be achieved without significant adverse impact on the environment, either at a local level through increased congestion, noise and pollution, or a global level through increased energy consumption. This will be an inherent part of the planning of a sustainable transport system.

The proposed mobility management plans are part of a comprehensive approach to the development of an integrated transport system as outlined previously. Whilst it is not intended to rely exclusively on such plans, they will play an important role in creating a more sustainable transport system in the CASP area. It is also proposed to implement measures to address the cumulative impact of proposals and at a macro level, this CASP update is a key initiative in this regard.

The CASP Transport Strategy is planned at a strategic level as an integrated network of transport infrastructure and services. Notwithstanding the fact that individual elements or measures bring significant localised benefits the full strategic benefits of the strategy will only be realised when all elements are in place and all elements are fully integrated.

The completion and integration of the system brings with it an added premium in terms of service level options for the consumer. These are referred to as “network effects” and relate to the significant change in the level of choice of service options that is brought about by integration. For example, by linking up bus services to Kent Station, a whole range of new destinations in the city becomes accessible for rail commuters coming from for example Cobh. The reverse is also true for bus passengers arriving at Kent Station who can now catch a train north to Mallow or Dublin or east to Glounthaune and Cobh.

In a similar vein the delivery of the Northern Ring Road around Cork will complete the strategic road network around the city thereby opening up a range of possibilities for both the road user and the road manager (the NRA and An Garda Síochána), in terms of route choice and major incident management. If a major accident or incident occurs in the Jack Lynch Tunnel traffic can be diverted around the west of the city. Without this western section of the Ring Road, the Jack Lynch Tunnel will become the Achilles heel of the road network. The same network management principles apply to transport networks as it does to Broadband networks, water supply networks and electricity and gas networks.

3.5.4 Objectives and Targeted Outcomes of Integrated Transport System

The immediate strategic objective of the integrated transport system is to create conditions that will facilitate a step change in public attitudes towards the use of public transport. This is seen as a strategic necessity not only for reasons of environmental sustainability, but also to be able to accommodate the growth in demand for transport that accompanies economic growth and expansion.

Research carried out as part of this Update indicated that there is a continuing growth in the demand for car travel and that significant congestion is being experienced on parts of the road network including the South Ring Road and the Jack Lynch Tunnel at peak times. Future growth in car based demand for traffic is eroding the capacity of the key national and arterial route network and is not sustainable. between now and 2020. If this growth is not addressed in an integrated way congestion will intensify and spread throughout the City and urban areas bringing average traffic speeds down to as low as 5mph. This must be addressed by providing a choice of mode of travel by public transport and other non car modes including walking and cycling.

By emphasising the provision and expansion of public transport we accommodate growth in a sustainable way and contribute to the overall quality of life for all by improving mobility, accessibility and connectivity in the CASP area,

The CASP strategy identified that motorised public transport provided for 19,750 trips or 22.8% of all travel demand in 2000. Rail travel had a share of 0.5% in the morning am peak rush hour. By 2020, the CASP Strategy identified that public transport will have to increase its share of travel demand by a further 19,000 trips in the morning peak hour in order to bringing considerable relief to congestion caused by car based traffic. Travel demand on rail services will have to increase from 450 trips to 7650 trips in the critical AM travel to work peak period an increase of 17-fold in order to reach the CASP targets. The switch from car based travel to public transport, known as the modal shift or switch will have to be in the order of 7,500 trips in the morning peak rush hour representing some 7.5% of total car demand in the CASP study area in 2020. This equates to 34% of the increase in car based travel demand over the period of the study. Along the upgraded public transport corridors themselves such as the rail or QBC corridors, the scale of the modal shift will need to be significantly higher, being 14% of all demand in the city area and up to 29% of all trips going to or from the city centre. These targets were set as a minimum in the CASP Strategy, and were to be reviewed regularly to ensure that the modal shift away from the private car is as high as possible.

Based on an analysis of the key measures in this Update future demand levels in the key AM travel to work peak period imply that a significant overall mode switch to public transport of motorised travel demand will be required to provide a manageable balance between public transport and car based travel beyond 2020. Research and modelling assessment carried out as part of the preparation of the CASP Update indicates that congestion due to increased car based journey times in the AM peak hour in the CASP area will increase by up to 57% in the absence of the provision of additional public transport measures. Modal share targets of up to 50% will be required as part of an overall programme of integration measures in the key rapid transit corridors in order to provide a manageable balance between public transport and car based transport.

In the key corridors it is estimated that future growth in motorised travel demand to the city centre will need to be met by Public Transport in order to balance mobility in the city and accessibility of the city for its key retail, administrative commercial social and amenity functions.

The provision of real modal choice is a critical milestone in the creation of an integrated transport network. In order to measure progress at a strategic level new modal split targets should be set for each of the radial and orbital corridors. This will require that data is collected and monitored on a structured basis annually in a similar fashion to the Cordon Traffic Counts and Annual September Traffic Counts carried out by both Cork City Council and Cork County Council. It will require public transport service providers and the local authorities to agree to common data sharing protocols.

At a local level the requirement to provide modal split targets and evidence of means to deliver and monitor them as part of a mobility management plan should be included as part of major development planning applications in all local authority areas.

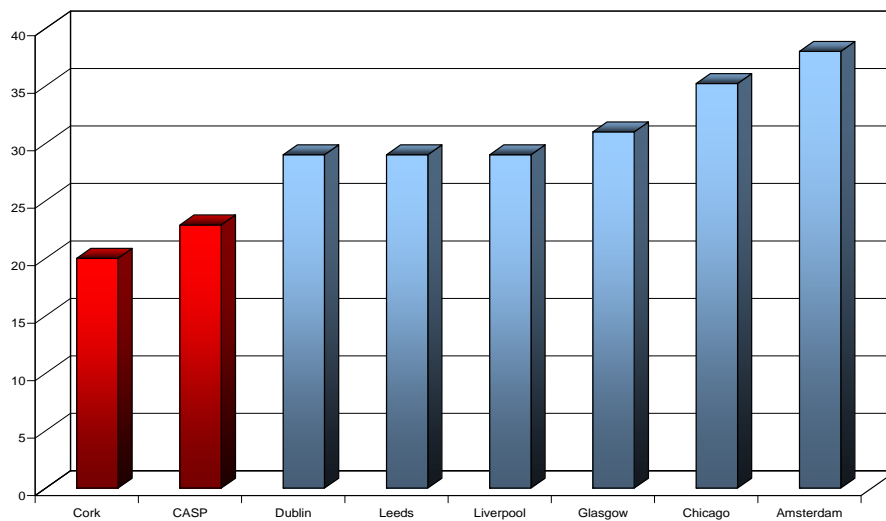
An analysis of the 2006 census data items relating to the travel to work journey has been completed using a MapInfo GIS assessment tool. The following datasets have been examined for both the 2006 data and changes between the 2002 and 2006 datasets where both are available.

- Population
- Modal Share
- Distance to Work
- Journey Time to Work

The key emerging messages in relation to this spatial analysis data can be assessed for the City and Metropolitan Areas and for the CASP region as a whole. The key points are that the current travel to work journey is heavily car dominated, though the city retains higher levels of public transport and pedestrian mode shares. People are willing and are facilitated in travelling longer distances to work by car due to the improved roads infrastructure particularly to the east and south of the city. Over 75% of people in the CASP area have journey to work times of less than 45 minutes which implies that in relative terms congestion and delay is not severe compared to large cities, but is still an issue.

In addition we highlight in the histogram below the comparative travel to work journey times between Cork and the CASP area and a number of other comparator cities. We believe this diagram is strategically significant in that it indicates that the Cork and the CASP region enjoy a relatively high quality of life insofar as less time is spent commuting to work than in other cities. When this is analysed in parallel with increased car ownership and the significant rise in road traffic levels and the relative delays in delivering public transport, it will be a significant strategic challenge to bring about the modal shift of existing car users into public transport. The provision of public transport services therefore needs to be differentiated from car based journeys by a concerted focus on the Total Journey Quality approach.

Figure 3.6: Comparative Average journey time to work, minutes



Source: Eurostat data and local city level statistics from Transport Departments where appropriate.

Research shows that progress on the achievement of the original CASP modal share targets has not been in line with expectations. There has however been some significant progress in the implementation of key measures such as the development of six of the ten designated green routes, the redevelopment of the bus station, provision of additional bus services, the investment by Irish Rail in the recent upgrading of the concourse and other parts of Kent Station, the implementation of improvements to the rail services (including hourly services on the Cork Mallow Dublin route).

In addition, the introduction of new rolling stock on the Mallow Cork Cobh commuter route as elements of an integrated transport system. Irish Rail has also invested in the recent upgrading to the concourse at Kent Station.

There is however a need for a focus on the integration of planning and implementation than might have been desirable, for example in the provision of integrated travel information to the consumer by way of a single transport map or a single transport website.

At the same time there has been considerable progress in the completion of a number of key roads elements including the N8 improvements, the Kinsale Road Roundabout, the Ballincollig Bypass and the Dunkettle Interchange Traffic Signals which while they have served to improve traffic flow capacity at peak hours have served to make car journeys in the key development corridors an easier choice for commuters in the short to medium term. These measures have been implemented in a period of unprecedented economic growth and attendant growth in car ownership and car use. Once patterns and habits of car use are formed they are difficult to change. The challenge for the CASP Update is to formulate an appropriate response which will address and as far as possible reverse the adverse car dependent trends.

3.5.5 Public Transport

“Total Journey Quality”

The development of a high quality, ‘state of the art’ public transport system is central to the achievement of an Integrated Transport System for Cork. It will provide key improvements in terms of mobility, accessibility and connectivity. The planning of all public transport services will be based on the principal of “Total Journey Quality”.

This concept is widely applied in the development of quality transport services, which means more new and improved transport services, more frequent services, improved reliability, low floor accessible vehicles, improved timetabling and availability and distribution of timetable information. The ultimate aim is to improve frequency and reliability so that the need for printed timetables becomes superfluous to regular users. However, the principle of the whole door-to-door travel experience applies equally to bus, rail and rapid transit, and is central to the philosophy of an Integrated Transport System.

Integrated ticketing, whereby a single ticket system is valid for all types of public transport, will be a vital component of the improved system. To be effective, this will require smart card ticketing and the most appropriate system will need to be studied and agreed by the relevant transport operators. Equally significant is the need to provide integrated, well displayed information for all travel modes and Park and Ride facilities. The information system must be easily accessible at all points of embarkation, and via phone and internet, in order to enable people to plan their journeys more easily. The whole experience of using Public Transport will be transformed and made more appealing, attractive and exciting for all potential users. A positive marketing approach will play an important role in changing the perception of public transport. Public attitudes can and do change, and a marketing campaign, possibly targeted at key audiences including younger people, could greatly improve the image of buses and trains over cars.

Figure 3.7: Total Journey Quality Approach

Cork City-Link Quality Bus in the Cork City Area		
A New Travel Concept for Cork		
The new Cork City Link is NOT just an upgraded bus service Cork City Link is a completely new concept that provides for ALL of the customer's needs from fireside to office desk, factory floor or shop counter!		
Component	Customer Needs	City Link will develop in one bus service
The Enquiry	How do I know about City Link?	<ul style="list-style-type: none"> £ High quality route information leaflets/cards £ Information on internet/mobiles £ Displays on and off site £ Links to transport hot line £ Information on ceefax/teletext
The Walk	How do I get to the City Link?	<ul style="list-style-type: none"> £ Footpaths safe, short and well signed £ City Links stops at convenient focal points
The Wait	Where will I wait for the City Link? Will it be uncomfortable? Will I be bored, frightened or unsure?	<ul style="list-style-type: none"> £ High quality, visible stops £ City Link stops integrated with shops £ Local information display £ Comfort and access for all £ Lighting and security £ Telephone £ Boarding - easy access £ Real time information
The Ride	What is the City Link service? How much will I pay and how? Will I be able to get on board Will the staff be friendly and efficient? Will it be a quick journey Will it be held up by other traffic?	<ul style="list-style-type: none"> £ Service is frequent £ Service is reliable £ Payment off vehicle £ Attractive prices £ Level boarding, raised platforms £ Comfortable interior £ Staff trained in efficiency £ Customer care a priority £ Routes match customer needs £ Speed £ Priority to City link, £ Visible advantage
The Walk	Will it take me right to where I need?	<ul style="list-style-type: none"> £ Access to City centre £ Easy link cross centre £ Advantage created
IMAGE	Will I WANT to ride the City Link?	<ul style="list-style-type: none"> £ High design standards to all elements £ Strong branding £ Major promotion programme

Source: RPS/Indecon Analysis

3.5.6 Supporting Initiatives

While the identification and delivery of infrastructure measures is important, of equal importance is the need to identify and implement a range of policy initiatives and active management measures which will deliver and manage the integration of the transport system. These initiatives include

- The integration of planning design and operation of transport services, infrastructure and facilities;
- The Integration of Transport Management Systems including development of the Cork Mobility Management Centre and associated ITS infrastructure;
- An integrated parking policy between City and County reflecting best demand management practice and incorporating zonally based maximum parking standards throughout Metropolitan Cork ;
- Local access infrastructure packages for all key public transport nodes including stations and key interchange points;
- Local area transport plans which identify measures (hard and soft) to support the achievement of the CASP goals in the local area;
- Emphasis on the provision and monitoring of modal choice in the development control system through the local authority development plans including setting mode share targets for towns as well as large scale developments;
- Effective implementation of supportive land use policies in the CASP area;
- A Strategic Review of the City and Suburban Bus Network;
- Strengthened integration structures with committed and dedicated resourcing from all key stakeholders and underpinned by the Department of Transport.

Research carried out as part of the CASP Update indicates that the current level of provision of public transport is not bringing about a step change in the level of transport service provision and consequent required patronage demand increases, although the progress which has been made is noted.

Given the challenge of accommodating the targeted increase in population the following items need to be included in any renewed transport approach for the region:

- The use of rail to transfer goods
- The use of incentivised school transport services
- The use of flexible urban transport services.

The use of rail to transfer goods where feasible would assist in reducing traffic congestion

The use of incentivised school transport services also merits further consideration and emphasis given the significant impact school related traffic has on congestion within CASP.

The use of flexible urban transport services is also likely to be required and this will involve the integration of services and infrastructure as discussed below.

The Integration of Planning Design and Operation of Services, Infrastructure and Facilities

The implementation of the integrated transport strategy will need consideration of the overall strategic direction and leadership for the implementation of the CASP transport strategy and the clarification of the roles and responsibilities in each agency including areas of required mutual cooperation between the various stakeholders in particular the service providers and the local authorities.

The integration of all elements of the planning design and operation of the transport system is crucial to ensure that the maximum benefits are derived from the system and value for money is achieved for the infrastructure investment.

Key modal interchange locations such as Kent Station and other major nodes including train stations and major bus and rapid transit stops should be seen as key infrastructure assets for the CASP area and will require an Integrated Design approach involving inputs from other service providers and the local authorities in order that full consideration is given to the opportunities that interchange design brings. For example, the provision of cycle parking facilities at stations and / or the carrying of bicycles on commuter rail services offers sustainable options for integrated journey planning from a customer perspective.

In order to improve the integration of planning design and delivery strengthened structures and resourcing will be required in the CASP Coordinator's Office and in the relevant technical departments in the local authorities. It will also require dedicated resourcing from key stakeholder organizations including Bus Eireann, Iarnrod Eireann and the National Roads Authority. In this regard a collaborative approach to integrated planning by centrally managed state agencies is required to deliver the required and appropriate flexibility at a local level recognizing that the balance of priorities between national priorities and programmes and gateway priorities and programmes has a regional dimension that is recognised in the NSS and the NDP and that must be fully and appropriately addressed in collaboration with local stakeholders.

Integration of Transport Information Systems (Incl. ITS & Soft Issues)

As set out in the CASP strategy an integrated transport system includes the integration of all elements of planning design and operation. This included the integration and sharing of key planning and monitoring data amongst the key service providers and the local authorities and this can be safeguarded by data sharing protocols if required. On the consumer side, customer information including trip planning, pre boarding and on board information should be integrated between service providers and the local authorities and most importantly this should be communicated clearly and consistently to the consumer throughout the transport system. The "Total Journey Quality" approach provides a conceptual framework for planning the integration of soft and information measures.

In accordance with the Total Journey Quality approach significant investment is required in tools and methods to leverage out the benefits of integration of information management and communication. Developments in Intelligent Transport Systems (ITS) and IT generally in the last decade have revolutionised the scope for management and integration and communication of information to both system managers and users. The development of a state of the art facility to manage and communicate transport information will provide significant added value to the investments being made in transport in the CASP region.

Cork City Council is currently procuring services to develop a state-of-the-art Mobility Management Centre with fully integrated services and functions in support of developing a more efficient and effective transportation system. It wants to consider and investigate the needs and opportunities to provide a range of possible applications and services to travellers within Cork City and beyond. The primary objectives of the Mobility Management Centre include but are not limited to:

- Efficiently and effectively managing the travel of people and freight throughout the City,
- Promoting and improving sustainable 'active' modes (walking, cycling, public transport),
- Informing people about available public transport, cycling routes and walking routes specific to their needs,
- Providing parking management for bicycles and cars, and encouraging car pooling, telecommuting and other innovative arrangements,
- Identifying opportunities to improve existing facilities and services for sustainable modes such as cycling proficiency training, parking management for bicycles and cars, and fleet management for bicycles and motor vehicles - "clean" and safe supporting people in changing their travel behaviour.

We are strongly supportive of the proposed Mobility Management Centre which has potential to have a transformational impact on the City. The steps being carried will be subject to detailed stakeholder discussions and development of recommendations to be carried forward: These will include mobility management strategies and implementation of a detailed strategy plan. The work will also cover technology, communications and monitoring.

Integration of Parking Policy

Cooperation on parking policies across all local authorities in the CASP area is required to apply maximum parking standards. This should underpin the achievement of the CASP goals and in particular the goal of the consolidation of the role of Cork City and the creation of an integrated transport system. This should include consideration of the introduction of graduated area based or zonal maximum parking standards in all urban areas in Metropolitan Cork and in the Ring Towns. Key stakeholders including CIE/ Iarnrod Eireann should be key consultees in the development of such policies. The preparation of the consistent plans will require close co-operation between the authorities and should have particular regard to the provision of parking at employment locations and at park and rides sites and the appropriate levels of parking required at stations and rapid transit locations.

Traffic Management, Parking, Car Restraint and Public Realm Improvements

The introduction of an integrated transport system will include significant initiatives for the management of the demand for road based travel. These initiatives will be operated in tandem and in co-ordination with the improvements to the provision of the public transport network. The three key management tools are: traffic management, parking management, and car restraint. The reduction in car use and car dependency will be achieved through a broad and well managed policy mix of initiatives including better public transport supply, improved land use planning and development control, traffic management and parking supply management.

At a strategic level parking policy needs to be used as a tool to achieve the objective of reduced car dependency. An integrated parking policy underpinned by a zonally-based maximum parking standard throughout the Metropolitan area is vital to manage the sustainability of the CASP transport network, both on the road network and on the public transport network.

It is vital that parking management is closely linked with the introduction of public transport alternatives so that the number of people attracted to the City and major urban areas is not diminished. The introduction of a zonally-based maximum parking standard will provide the framework for the graduated introduction of parking charges in all parts of the Metropolitan area. It is envisaged that the changing system will be graduated with the highest charge in the city and town centre areas and adjacent to public transport corridors. Residential permit systems will be introduced as appropriate in tandem with new parking regimes.

The introduction of congestion charging will work best when there is a sufficient scale and capacity of public transport alternatives available to people travelling to the city centre and when the Northern Ring Road is complete so that all through traffic can avoid the city.

The provision and management of car parking raises two issues which need to be balanced. Firstly, reduced parking availability in urban locations will improve the pedestrian environment locally. More generally, reduced parking availability (or increased charges) is a powerful car restraint measure. More than any other single measure it will encourage a transfer to other modes. The second issue is that parking availability and economic viability and vitality are closely linked. A very vibrant centre requires a strict and well managed parking policy which will support and encourage larger numbers of people by public transport and which will enhance the pedestrian environment and increase public enjoyment and retail spending.

Detailed consideration must be given to managing existing parking supply so as to support the car restraint policy and the proposed public transport measures. Enforcement will be a critical component of parking management. For new City centre developments, only a minimal level of operational parking (space for deliveries and visitors, not for commuters) should be provided, in tandem with strict parking controls for the surrounding streets. New car parks should not be located on the Island, and these provisions should be carefully controlled elsewhere in the City centre.

Local Infrastructure Packages to Complement Key Investments

Key critical infrastructure is currently being delivered in accordance with the CASP Strategy including the Green Routes, Park and Ride sites and the railway infrastructure including the Blarney to Midleton Rail Corridor. It is evident that coordination in the planning and provision of complementary inputs and infrastructure is not always at a level that delivers the best solution for the travelling public.

Major infrastructure investments such as the Blarney to Midleton Rail Corridor should be complemented by the parallel delivery of local infrastructure packages at each of the railway stations that provides ready and easy access by foot, by bicycle, for mobility impaired and by car including the provision for parking. These infrastructure packages should be tailored to improve the local access network within up to 1km of the station and should include road signage and information signage to inform customers of the location, direction and distance to the key transport nodes.

Railway stations provide a key opportunity for modal interchange. The design of the layout of new railway stations including Kent Station should allow for ease of access by bus, on foot, by bicycle and by car and should provide facilities to allow for ease of transfer between these modes. Railway stations and bus stops and rapid transit stops should included up to date location, timetable and service route network information as a minimum. The long term objective should be to provide realtime instantaneous information to the customer at key service stops including realtime information in relation to next available services.

These local access infrastructure packages provide a relatively low cost means of leveraging out the full benefit of key investments such as those in the rail corridors. An example of one such good practice initiative being progressed in Cork is the EU sponsored MIDAS project which seeks to identify a range of soft measures to encourage transport users to switch to more energy efficient transport, and in the first instance the project has focused on the Cork-Cobh rail corridor. The methodology and approach for this initiative should be considered as a pilot project which should be expanded to the entire CASP area.

Examples of good practice in interchange design are highlighted by the DTO guidelines on Public Transport Interchange and by sample designs for stations on the DART network.

Land Use Planning and Development Control

The review of progress on CASP goals indicates that whereas land use policies are consistent with CASP, the outcome in terms of changes in land use and strategic population targets by location was not achieved. Effective implementation of development control policies and in particular those elements that influence travel demand including densities and local transport accessibility and parking standards, have a critical bearing on the viability and success of the integrated transport system.

The implementation of development control policies should be reviewed to ensure that proactive measures are in place to achieve the desired outcomes of sustainable and compact settlements in both the ring and metropolitan areas within the lifetime of the plan. The implementation of effective development control in supporting public transport policies is critical as transport is a derived demand directly influenced by the scale, location and density of developments and in particular by the supply of parking and alternative transport choices.

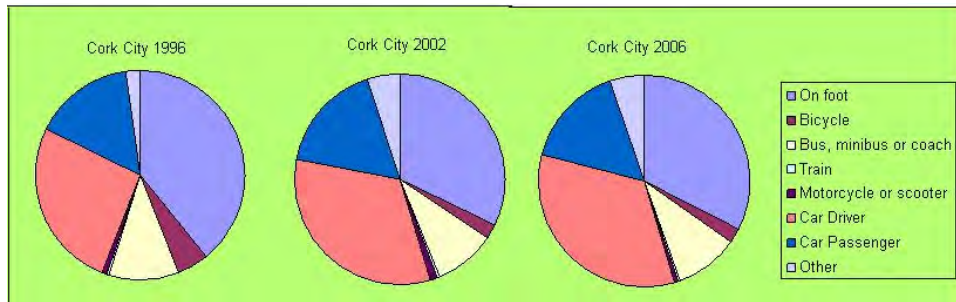
Strategic Modal Choice and Modal Split Targets

The provision of real modal choice is a critical milestone in the creation of an integrated transport network. In order to measure progress at a strategic level modal split targets should be set for each of the radial and orbital corridors. This will require that data is collected and monitored on a structured basis annually in a similar fashion to the Cordon Traffic Counts and Annual September Traffic Counts carried out by both Cork City Council and Cork County Council. It will require public transport service providers and the local authorities to agree to common data sharing protocols.

At a local level the requirement to provide modal split targets and evidence of means to deliver and monitor them as part of a mobility management plan should be included as part of all major development planning applications in all local authority areas.

Currently modal choice information is provided by the Census Data (2006) and the information available is dictated by the structure and format of the census. The figure below describes the mode of transport used by households in the CASP region to travel to work, school or college.

Figure 3.8: Mode of Travel to Work/School/College in Cork City Area within CASP

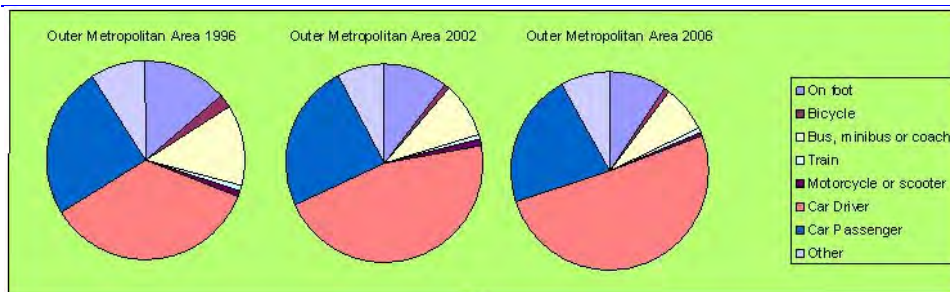


Source: Analysis of CSO Census of Population

The figure highlights the changes in the share of the overall demand for travel to work school and college in Cork City between the census of 1996, 2002 and 2006. In 1996 some 42% of people drove a car or were car passengers on their journey to work school or college, 39% walked and 11% used public transport in the form of bus or train. In 2006 some 49% of persons used a car or were car passengers, 32% walked and 10% used public transport in the form of bus or train. This data relates to people resident in the Cork City and does not include people who travel into Cork City from outside.

The figure below describes the changes in the share of the overall demand for travel to work school and college in the Outer Metropolitan Area of Cork between the census of 1996, 2002 and 2006.

Figure 3.9: Travel to Work/School/College in Outer Metropolitan Area within CASP

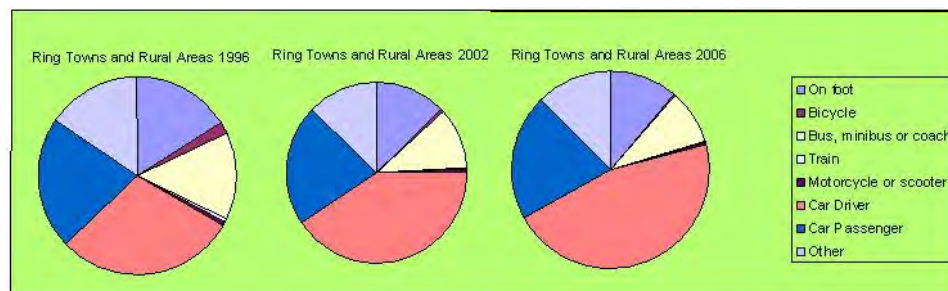


Source: Analysis of CSO Census of Population

In 1996 some 60% of people drove a car or were car passengers on their journey to work school or college, 14% walked and 14% used public transport in the form of bus or train. In 2006 some 73% drove a car or were car passengers, 10% walked and 8% used public transport in the form of bus or train. This data relates to people resident in the Outer Metropolitan Area of Cork.

The figure below describes the recent movements in the share of the overall demand for travel to work school and college in the Ring Towns and Rural areas of the CASP Study Area between the census of 1996, 2002 and 2006. In 1996 some 51% of people drove a car or were car passengers on their journey to work school or college, 16% walked and 15% used public transport in the form of bus or train. In 2006 some 66% used a car or were car passengers, 11% walked and 9% used public transport in the form of bus or train. This data relates to people resident in the Ring Town and Rural Areas of Cork.

Figure 3.10: Travel to Work/School/College in Ring Towns and Rural Areas within CASP



Source: Analysis of CSO Census of Population

Overall, the census data on mode to work shows the city as the most sustainable area in terms of mode of travel, with a substantial proportion of travellers on foot, and around 50% car use which did not increase greatly between 2002 and 2006. The outer metropolitan area is the least sustainable, with the highest car use at nearly 75%.

Current modal split targets for future scenarios are based on the original CASP forecasting model which used the census data as a baseline. As such they do not facilitate the ready means of setting corridor based targets and are focused on generalized targets for motorized travel in the CASP area and for the City and City centre areas. The current mode split targets for 2020 are as follows:

Table 2-14: Transport Modal Shifts Implied by CASP

Mode	2000	2020 target
Rail	450 (0.5%)	7,600 (5%)
Bus	19,300 (22.3%)	31,150 (20.5%)
Car	66,850 (77.2%)	113,500 (74.5%)

Source: CASP (2001)

Review of Bus Networks

The progress on CASP goals indicates that significant investment has been made in the bus fleet, in a redeveloped central bus station and in the Green route infrastructure. Despite this the patronage for the Bus Eireann City and Suburban bus services is not increasing in the AM travel to work peak period.

However, the welcome increase in overall bus patronage is noted. Some success has also been achieved in the introduction of new orbital bus routes in the city, and overall patronage on bus services is rising, including on the outer suburban and rural and inter-city routes. A strategic examination of the bus network in Cork City and suburbs should be carried out, including services to and between towns in the Metropolitan area and in the Ring towns and rural areas of CASP. This review should be carried out in the context of the emerging and planned spatial patterns in the CASP area and should consider the best mechanisms to procure and deliver new services, including the requirements for funding and subvention.

The issue of subvention however raise national policy issues and there are limits to local controls on the level of funding. The review should include in its scope the identification of the critical issues that continue to constrain the achievement of patronage increases particularly in the critical AM travel to work peak period and the range of actions and investments that are required to deliver the levels of service that will bring about a step change in public transport and help achieve the modal split targets. The scope of the review should include consultation with the local authorities, Bus Eireann, Iarnrod Eireann, the Departments of Transport and of Environment Heritage and Local Government, An Garda Siochana and other key stakeholders in the CASP area including the general public. The scope of the review should include a review of the existing network coverage, existing and emerging markets and the resourcing requirements to respond effectively to these markets in the context of achieving the CASP goals in the short medium and longer term.

The provision of sufficient bus vehicles in the city services fleet should be evaluated in order to ensure that the sufficient buses are available at peak times and throughout the day to provide capacity to meet demand in a balanced way so as to provide a more frequent and reliable service and to ensure that the initial investment in the Green Routes corridor and other aspects of the integrated transport strategy is not undermined in the eyes of the travelling public.

In the context of the proposed strategic review of the City and Suburban services all elements of the service provision on the green routes corridors should be reviewed taking note in particular of the "Total Journey Quality" approach. In considering the extent of the bus network consideration may be given in cooperation with other stakeholders and the local authorities to the need to improve service levels and provide additional infrastructural support including facilities similar to those provided in the original Green Route corridors to route corridors which serve new emerging areas that have experienced significant recent growth but have less well developed public transport services. These areas may include Glanmire/Riverstown, Little Island, Rochestown, Carrigaline and Ballincollig. It is noted that Carrigaline and Ballincollig were both included in the original green routes network. In the short term Little Island requires urgent focus on provision of bus based public transport in a balanced response to the over reliance on car dominated commuting in the employment areas in Little Island itself.

The introduction of new rail services from Blarney to Midleton will require a focus on developing complementary bus service networks linking the new rail stations at Midleton, Carrigtohill, Kilbarry, Monard, Blarney and Mallow with their hinterland catchments in order to support the provision of modal choice and integrated bus and rail services in the CASP area.

3.5.7 Upgraded and Improved Green Routes

A network of Green Routes was identified by the CASP Strategy. Green Routes are high quality, high profile public transport corridors where the emphasis is on providing high quality bus services in dedicated road space with suitable priority in the traffic management systems to bias in favour of the movement of large numbers of people rather than large volumes of vehicles.

The planning and implementation of these Green Routes incorporates improved footpath spaces and separation and protection of pedestrians from traffic streams as well as the provision of dedicated road space for cycle lanes and cycle tracks. Waiting facilities at bus stops including the provision of real time information will be greatly improved and boarding facilities will be improved for the mobility impaired by providing higher bus boarding platforms to match the low floor buses.

Considerable progress has been made in terms of the delivery of the first phase of development of the Green routes and significant investment has been made in both the on-street infrastructure and the upgrading of the bus fleet to implement the Green Routes in accordance with the CASP Strategy. The City Council intends to review progress on all on-street prioritisation of the Green Routes when the initial implementation of all ten routes is complete in 2009 with a view to identifying a programme of measures to further improve bus priority and pedestrian and cycle facilities and to improve journey time reliability and average journey speeds.

The planning benefit of these Green Routes includes a more focused direction of resources on the specific network of high grade corridors where the end user benefits are shared by the greatest number of people. Speeds for buses on the Green Routes and routes from the Park and Ride will be as fast as possible and an overall route average speed of 20kph was identified as a performance target in the CASP Strategy. Over time, an increasing level of priority will be given to buses so that they can maintain reliability, speed and competitiveness as congestion builds up. The priority measures chosen will be tailored to the characteristics and requirements of each route. Overall, the CASP strategy proposed the introduction of 10 Green Routes to include the main existing bus routes, and corridors serving Park and Ride sites. A park and ride facility has been developed at Kinsale Road.

The feasibility of green routes for other areas should be considered as part of the strategic review of transport services, and for example, ways of improving the services for public transport users, pedestrians, cyclists and other road users on routes such as the R610 between Passage West and Douglas should be examined.

In this context Cork County Council have indicated they are proposing to commission a Douglas Transportation Study which will commence in September 2008 and the issue of any proposed Green Route from Passage West to Douglas should be evaluated as part of this study.

Orbital Green Routes

Following on from the Committee on Public Transport's Report in 1999, the CASP Strategy envisaged the development of orbital bus routes around the Metropolitan Area as a key component of the integrated public transport system. Two orbital bus routes have been successfully introduced by Bus Eireann, one on the northside of the city running from Mayfield to Bishopstown and one on the southside from Mahon to Bishopstown.

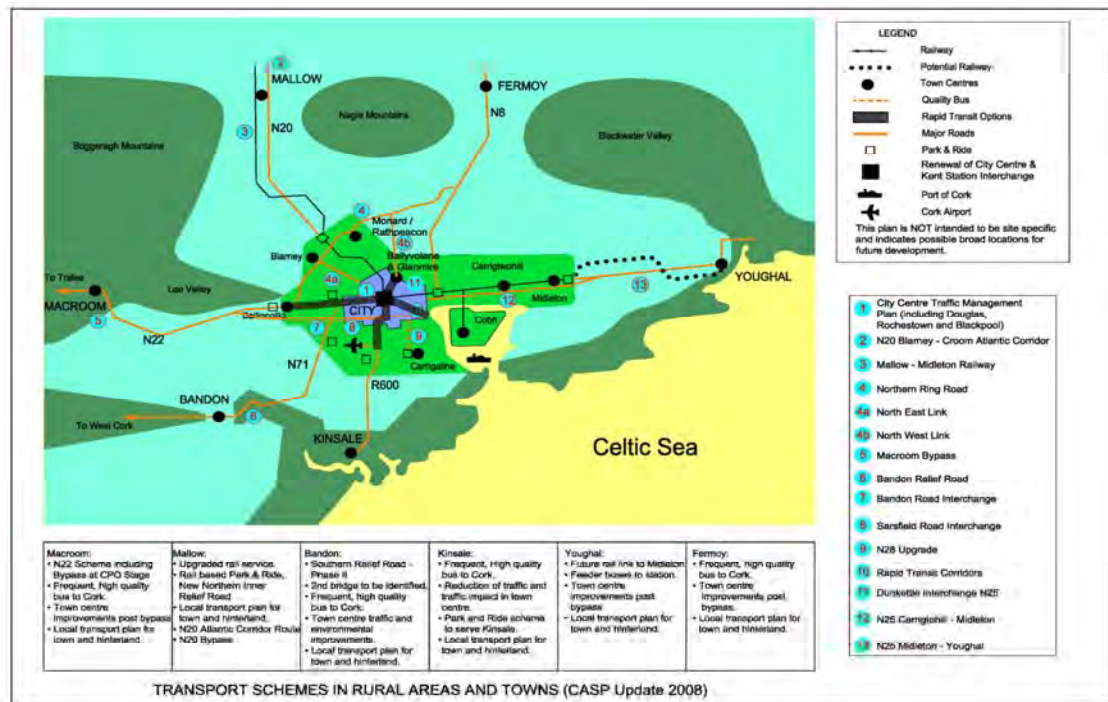
Consideration should be given to identifying Orbital Green Route corridors based on these routes including identifying the range of priority measures that will support an increased level of service, frequency and higher average speeds particularly in the critical AM travel to work peak period. Consideration should be given to other potential orbital corridors including a corridor linking the north east of the city with the south east of the city taking in Silversprings, Docklands and Mahon by introducing public transport priority measures in the corridor and on all new cross river bridges.

Bus Services to the Ring Towns and Rural Areas

Improved frequency bus services have been introduced between the Ring Towns and the City reflecting an increased demand and growing patronage generally on the bus network. The introduction of hourly bus services between Cork and other major cities including Dublin Waterford Limerick and Galway underpins the high quality bus services to the main ring towns.

The successful redevelopment of the Parnell Place Bus Station now provides a high quality facility for bus passengers in the City Centre. These services currently integrate with the City services at the city centre Bus station and they can avail of the priority and timesavings of the Green Routes on the last leg of the journey into the city centre. Higher frequency services have been introduced to the towns of Kinsale, Bandon, Macroom and Fermoy along radial road corridors not served by rail and further improvements will be introduced in line with growing demand. These high frequency routes will benefit from the planned development of dedicated public transport corridors on the major radial roads approaching the city as well as on the orbital routes. Other bus services in the Ring Towns and the rural areas will be introduced as required as part of the local integrated transport plans.

Figure 3.11: Transport Strategy for Ring Towns & Rural Areas



Source: RPS GIS Mapping

3.5.8 Commuter Rail Services

The provision of commuter rail services will be substantially upgraded with the reopening of the rail line to Carrigwohill and Midleton, the introduction of new services from Mallow and Blarney into Cork, and the upgrading of the rolling stock and frequency on the Cobh rail service as the demand increases over time. The provision of a service to Youghal may in the future depending on population sizes be feasible and this should be kept under review, together with the potential for incremental extension of the rail east towards Midleton.

Mallow-Blarney-Cobh-Midleton

The existing railway corridor from Mallow to Kent Station and from Kent Station to Cobh is a key transport infrastructural asset. Significant progress has been made in the upgrading and improvement of the permanent way and signalling infrastructure as well as station and car parking improvements at

Mallow, Kent Station and intermediate stations. More remains to be done. The reconstruction of the Glounthaune to Midleton section is underway and is due for opening in 2009. Development of additional rail stations at Carrigtwohill West and Midleton west are also recommended.

This corridor provides the railway operating capacity to deliver frequent commuter trains between Mallow and Cobh and Midleton serving all stations in between including the key interchange at Kent Station. It is planned to initially operate the services to Midleton using train sets similar to those used on the Cork Cobh service, i.e. two car Diesel Multiple Units. These have the capability to be extended to four or six car units in the future as demand increases. The Cork Suburban Rail Feasibility Final Report (2002) provides the basis for the operational planning for the new commuter railway, and there is adequate scope to increase the service levels on the suburban rail route in response to additional growth in the corridor. The investment in the rail corridor and rail stations should be complemented in a coordinated way by investment in the local road access network to provide for access by foot, by bicycle, mobility impaired, local bus interchange and car access.

The preferred option outlined in the Cork Suburban Rail Feasibility Study included the re-opening of the Midleton line with new stations at Midleton and Carrigtwohill with a 15 minute frequency using 2 car diesel multiple units (DMUs) and a through half hourly service from Cobh to Mallow also operated by 2 car DMUs with new stations at Dunkettle, Kilbarry and Blarney. The following would be introduced in line with development and associated demand: increased car park capacity at Blarney, Dunkettle, Carrigtwohill and Midleton and services would be upgraded to 3 car DMUs. An additional station at Monard would also be provided to coincide with the first phase of the major housing development planned for the area.

The study obtained a Net Present Value of €275 million based on detailed financial and economic evaluation; however the conclusions were dependent on the full implementation of the CASP land use strategy. Key points of a sensitivity analysis were that rail investment would not be viable unless 75 to 85 % of the planned development occurred and failure to restrain car parking in Cork City Centre would reduce the economic NPV by approximately 50% and an enhanced bus network in the railway corridor would reduce the NPV by approximately 20%.

It is noted that the preferred option was based on the Study Option 3 and the options that included for higher frequencies and additional stations were not considered economically or financially optimal by the study. Option 3 caters for 4497 passengers in the AM peak period in 2020 and a 340% increase in overall patronage over the baseline scenario by 2020 and the enhanced option with additional stations and rolling stock caters for 5145 passengers in the AM peak period in 2020 and a 450% increase in overall patronage.

Construction has commenced on the redevelopment of the railway line new track and signalling from Glounthaune to Midleton. The scheme includes new stations at Carrigtwohill, and Midleton. An additional station is to be built to cater for Park and Ride demand at a suitable location close to Dunkettle. On the Cobh branch, a new station may be required, as identified in CASP, to cater for the growth of Cobh including provision of a rail based Park Ride at Ballynoe. The new commuter service to the north of the City will use the existing mainline rail between Cork and Mallow. Three new stations are planned at Kilbarry, Monard/Rathpeacon, and a Park and Ride station is planned to the north of Blarney, to be located near Blarney station.

During the morning peak period the following rail service frequency is envisaged pending publication of the operational timetable when the new Midleton route is opened in early 2009:

- Mallow - Blarney Hourly, then every 30 minutes in the longer term
- Blarney - Cork Every 15 minutes
- Cork - Glounthaune Every 15 minutes initially, then every 7.5 minutes in the longer term
- Glounthaune - Cobh Every 30 minutes, then every 15 minutes in the longer term
- Glounthaune - Midleton Every 30 minutes, then every 15 minutes in the longer term

A substantial increase in Rail Patronage in Metropolitan Cork was forecast in the CASP Strategy as follows:

Table 3.15: Forecast Rail Service Patronage

Frequency	2000	2006	2013	2020
Daily Patronage	3,000	16,300	24,100	30,900
Yearly Patronage	800,000	4,300,000	6,400,000	8,200,000

Source: CASP (2001)

Table 3.16: Scenario Based Rail Service Patronage

Frequency	2006			2020		
	Annual (m)	Trips	% Change on Baseline	Annual (m)	Trips	% Change on Baseline
Baseline	1.243	-	-	1.811	-	-
Preferred Option 3	3.79		205%	7.985		341%
Enhanced Option 6	4.993		302%	9.943		449%

Source: Cork Suburban Rail Feasibility Study

Research carried out as part of the CASP Update suggests that there may be additional peak period patronage of up to 50% on the rail line when the full CASP Update population and employment scenario is in place. The Cork Suburban Rail Feasibility Study indicates that there is sufficient flexibility in the scenarios considered and in the operating model to allow consideration of the expansion of service levels and addition of stations in the corridor in response to demand. It is recommended that the demand forecasts in the Cork Rail Study be reviewed following the opening of the Midleton Corridor taking into account the additional population and economic growth forecast in the CASP Update

It is important to emphasise that the benefits of investment in the improved rail system for Metropolitan Cork depends upon development along the rail corridors going ahead as proposed in CASP.

Kent Station Re-Development

Kent Station was identified in the CASP Strategy as the hub of the integrated public transport. Draft proposals have been in preparation and discussion for a number of years. Further proposals have been made in line with CASP that a rapid transit route through Docklands is routed to the Kent Station Interchange (these proposals are discussed in the following paragraph).

The proposals for implementation of the Kent Station Interchange including the redevelopment of the concourse building to face the river should be expedited with urgency and should incorporate provision for a dedicated rapid transit route to interchange with all other transport service within the concourse curtilage so as to minimise interchange time penalties to all public transport consumers.

Proposals for the redevelopment of Kent Station have been prepared by Iarnrod Eireann in partnership with private developers. The redevelopment will include:

- The reconfiguration of the platforms to allow through-running of trains from the Mallow line to the Cobh and Midleton lines.
- Better integration of the station with the City centre and Docks by re-modelling the station building to provide the main entrance to a new concourse to the south with safe and direct walk links to the City and fast reliable rapid transit and bus links to the City and major destinations.
- Multi-modal interchange between rail, rapid transit, bus, cyclists pedestrians and car users.

The Kent Station development will be the hub of the integrated transport network and all aspects of the planning design and operation of Kent Station should reflect this. In particular the total journey quality ethos should be at the heart of planning the layout and the information systems.

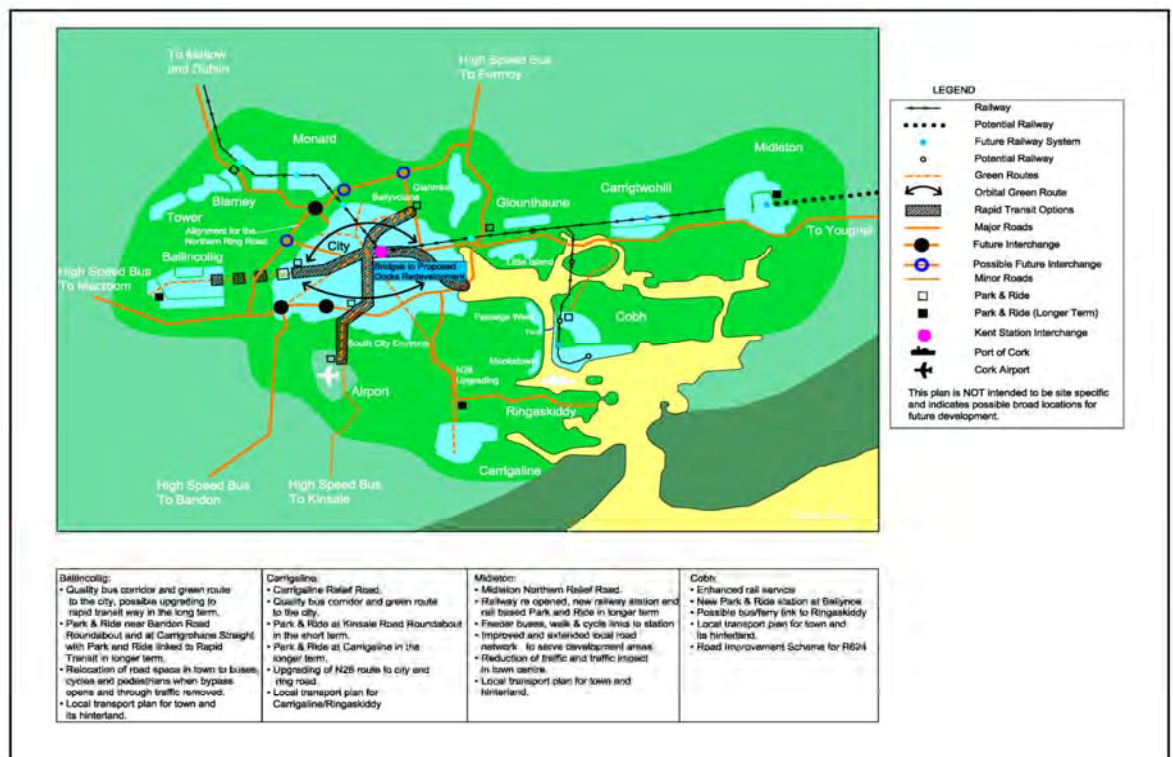
The planning of complementary infrastructure including car parking at Kent Station should be integrated with other aspects of the Integrated Transport System including the proposed integrated parking policy. The provision of parking at Kent Station should focus on provision for transport system users and not undermine land use and parking policies in the surrounding areas.

Intercity Services

Significant progress has been made in implementing a clock face hourly timetable for Intercity trains between Cork and Dublin. The provision of improved frequency of connecting services to other gateways and hubs at key junctions such as Mallow, Limerick Junction and Portarlington should be progressed to provide a wider choice and range of alternatives to road transport.

The focus for the development of intercity services should now focus on delivering all aspects of the total quality journey for intercity users and in particular the planning of connections and interchange at Kent Station as well as developing integrated ticketing products that allow customers to travel from Skibbereen to Stillorgan or Sligo on one ticket.

Figure 3.12: Transport Strategy for Rest of Metropolitan Cork



Source: RPS GIS Mapping: Note that there are no decisions at this stage on future potential interchanges and that these will be inter alia informed by NRA's interchange review which is currently underway.

3.5.9 Rapid Transit Corridors

The economic case for the development of rapid transit corridors is very dependent upon having sufficiently high population densities close to potential routes to support frequent, high volume services. Although the forecast demand in the CASP Strategy did not originally support the further extension or construction of new light rail or rapid transit routes, this has been conducted as part of this CASP Update. A separate detailed feasibility study of this is being commissioned by Cork City Council.

It is important to outline the timelines to which the detailed feasibility study into rapid transport routes will be completed. The targeted date for completion is end October/November 2008. The findings on this will feed into Government investment decisions and into the on-going planning of transport by public authorities. This may involve adjustment to the implementation of the detailed CASP Transport Plans as presented in the Update.

The detailed feasibility studies undertaken by Cork City Council will determine the nature, location and extent of any proposed rapid transit corridors proposed in the Updated CASP Strategy.

It is recognised that public transport has to be targeted as the key transportation mode to service anticipated growth in the CASP area. The ambitious targets for population growth for CASP, which have been set by Government as part of its National Spatial Strategy, will have implications for traffic movement, however, the Updated CASP Strategy is focused on the delivery of additional population in close proximity to the City and on the rail corridor, along existing or potential public transport corridors, minimising as far as possible the impact of car borne commuters on the National Road Network.

The updated Strategy gives a high priority to a concerted effort to identify and develop opportunities for producing strengthened public transport choice through a combination of new public transport routes/infrastructure and other appropriate measures.

In considering plans for public transport it is important to ensure that this includes providing an efficient transport system to facilitate the movement of students to key hubs including at UCC, CUH and CIT. This is also important in enabling transport infrastructure to meet the needs of the expanded skill base proposed for CASP.

The development of the public transport corridors should be provided as early as possible as high density development in areas such as the Docklands is predicated on the provision of public transport.

Rapid transit can be defined as an urban public transport system which provides a “turn up and go” service. This requires a maximum headway between vehicles of 10 to 15 minutes or a minimum frequency of 4-6 services per hour over core sections of a route. The approach to assessment of rapid transit corridors should be progressed in a structured framework and decision making process that identifies clearly the high level need for the service and then identifies the problems that the rapid transport system is intended to address, the policy objectives to which the rapid transit is intended to contribute, the context within which the rapid transit system will be implemented and operated and the physical opportunities and constraints that will influence the design of the rapid transit system.

A key strategic assessment and design parameter for the development and design of rapid transit systems is underpinned by the concept of “Level of Service”. This is entirely consistent with the “Total Quality Journey” approach advocated in CASP as it basis the approach to designing the transport system on the customer’s requirements. The level of service is determined principally but not solely by the certainty of journey time which the rapid transit system can provide. It is also in turn determined by the frequency and reliability of the service and the levels of comfort and information provided at all stages of the journey. In urban environments, this journey time certainty is determined by the level of segregation and priority given to the rapid transit service over other urban activities. Therefore there is a spectrum of service level provision between bus and LRT which involves trade offs between investment and running costs on the one hand and level of service provision on the other. It is recommended that the CASP Update seeks to provide the highest level of priority and enforcement possible on all rapid transit corridors, balancing this with the need to maintain and manage the vibrancy and vitality of the City and the achievement of the CASP goals.

The CASP Strategy required that in the interim potential rail or light rail corridors are not severed or blocked by development. In developing the high quality bus corridors, such as that proposed between Ballincollig and Mahon via the City Centre and Docklands, the possibility of upgrading to light rail in the long term should be considered at the planning stage. The planning and development of all major orbital and radial roads, including the N8, N22, N25, N27, N28, N71 should consider the future need to accommodate dedicated public transport corridors in urban areas. This requires urgent consideration by the Department of Transport and the two local authorities and other stakeholders including the NRA. Such consideration needs to take account of the costs, effectiveness and value for money of such provision and the various options available to achieve the desired outcomes while satisfying the financial, project approval and approval requirements of the Department of Transport.

As part of the CASP Update the requirement for Rapid Transit including Light Rail Transit and Bus Rail Transit has been considered and two potential corridors have been identified. It is recommended that a detailed study be carried out expeditiously to confirm the technical feasibility and the economic case for investment for these corridors. It is recommended that the study considers a wide range of transport technologies including bus, quality bus, bus rapid transit and light rail transit and that particularly consideration is given the compatibility and integration with existing public transport and to the level of service targets that are appropriate to a high quality public transport service in Cork. Cork City Council is currently procuring the feasibility study and it is anticipated that the feasibility study will be complete in autumn of this year.

Rationale

The strategy for additional economic and population growth has set out a rationale for the location and distribution of future population and employment growth. This rationale adheres to and is consistent with the achievement of the original CASP goals and the national and regional policy context.

To complement the preferred spatial strategy we have identified two principal potential rapid transit corridors. These are in addition to the existing and planned railway corridors which are also considered as high quality, high capacity public transport corridors. It is intended that these two additional rapid transit corridors should become the basis for the planned location of significant new population and employment locations at densities appropriate to support the case for the provision of high quality infrastructure including public transport.

It should, however, be noted that the economic case for the development of rapid transport corridors is very dependent upon having sufficiently high population densities close to potential routes to support frequent high volume services. A separate detailed feasibility on potential rapid transit corridors is being commissioned by Cork City Council and the potential corridors identified are subject to this proposed feasibility review. It is also important to note that there are varying levels of service which may be appropriate on any corridor ranging from green route/quality bus corridor to bus rapid transit and light rail transit.

In considering which system and technologies are appropriate it is important that clarity is achieved at a strategic level as to the function and objective of the investment so that the case for funding may be structured appropriately. In the case of CASP it clear that the overarching goal is the achievement of the strategy goals, but an investment in a rapid transit corridor may include important sub goals such as urban redevelopment in the Docklands. It is important that the case for rapid transit has a leader or champion at political and executive level.

Timing and Sequencing

The case for developing rapid transit will be intrinsically linked with the implementation of the economic and spatial strategy. Clearly this strategy has to be formulated around the development of an integrated transport system.

Currently the investment in the railway corridor is the current driver of sustainable development in the CASP area and should continue to build on this momentum in the short to medium term and this is therefore the only current corridor that supports sustainable transport goals. In support of the preferred spatial option the following corridors warrant further detailed investigation based on the appropriate allocations of population and employment. These corridors are consistent with the CASP Integrated Transport System.

A key strategic issue in the implementation of the rapid transit corridors is the timing and sequencing of their implementation as investment in these corridors will have a critical and strategic impact on the location scale and direction of development in the CASP area. It is noted that current development is continuing in the Northern and Eastern corridors to support the investment of the railway and a momentum has been developed and this momentum should not be diluted.

The timing and sequencing of the potential rapid transit corridors should be planned in a manner that conveys to the market and the broader public the importance attached to adhering to and achieving each of the CASP goals.

The potential corridors as described comprise a corridor width of approximately 1000m. The catchment areas of rapid transit corridors typically are between 250m and 1000m from the station or stop locations depending on the level of service offered. These corridors are not specific or prescriptive about particular street route or alignment options, though clearly given the nature of the existing urban structure there will be a limited number of feasible options that do not require significant urban restructuring.

Corridor 1 - Blarney to Midleton and Cobh Rail Corridor

This corridor is the current CASP proposed rail corridor from Blarney through to Midleton with proposed new stations at Blarney, Monard, Kilbarry, Dunkettle, Carrigtohill and Midleton. This corridor was subject of a detailed feasibility study by Iarnrod Eireann in 2002 and a number of the recommendations have been progressed including through trains from Mallow to Cobh and the construction of the Midleton line.

It is currently estimated that this corridor has a current population catchment of 29,700 within 1000m of the centre of the indicative and existing station locations based on a detailed assessment of the CSO census data. The corridor length is 29km from Blarney to Midleton and 10km from Glounthaune to Cobh.

The future levels of population and employment in the corridor and accessible by the integrated transport system will underpin the demand for transport services in this corridor.

The recommended CASP Update Spatial development option has identified Corridor 1 as the key growth corridor in short term to support the continued investment in the railway line. Additional population growth of 48,500 has been allocated between 2006 and 2020 to settlements along the corridor including Blarney, Monard, Kilbarry, Glounthaune, Carrigtohill and Midleton. This gives an estimated total population in the corridor of nearly 80,000 in 2020. Additional employment growth of approximately 7,500 has been targeted for other settlements in the corridor, including Midleton and Carrigtohill. However the employment growth will be targeted principally at the city centre and the Docklands, where employment growth in the order of 15,500 is envisaged. The integration of the transport system will be critical particularly at Kent Station in order to provide realistic competitive journey time alternatives to car based commuters. It is recognised that development along the rail corridor is a sustainable option.

Research and transport modelling assessment carried out as part of the preparation of this Update has indicated that the additional growth in population and employment in the CASP area could lead to an increase of up to 50% in the level of patronage demand on the railway corridor in the 2025 AM peak hour over that envisaged by the Cork Suburban Rail Feasibility Study (2002) which is the current basis for planning of the rail system operation. It should be noted that the Rail Feasibility Study identified a level of services (and hence capacity) for the rail corridor which can be expanded by the provision of additional frequency, additional rail car lengths and the provision of additional stations for example at Waterrock, Carrigtohill West and Ballynoe which were not deemed justifiable in 2002. An additional station at Tivoli to support the future redevelopment of this area may also be required. It is recommended that the demand forecasts for the railway corridor be reviewed and updated after the opening of the Midleton Rail Corridor in 2009 taking into account the CASP Update Strategy.

Corridor 2 - Mahon-Docklands - City-UCC-CUH-CIT/Bishopstown

This corridor will link the Docklands with Mahon to the south and with the City Centre including the key interchange point at Kent Station. To the west it will link the city centre with the key major trip attractors at University College Cork, University College Hospital and the Cork Institute of Technology at Bishopstown and will take in other major travel demand generators such as FAS and the IDA Business Park on Model Farm Road.

It is currently estimated that this corridor has a current population catchment of 31,650 within 500m of the centre of the indicative corridor line based on a detailed assessment of the CSO census data. The corridor length is 10km from Mahon to CIT.

The future levels of population and employment in the corridor and accessible by the integrated transport system will underpin the demand for transport services in this corridor.

The CASP Update has identified this corridor as a key transport corridor linking major growth and development areas with existing major institutional trip generators and the transport interchange hub at Kent Station. This corridor has the potential to be developed as a Rapid Transit corridor.

Additional population growth of 26,000 has been allocated between 2006 and 2020 to areas within the corridor. This gives a total catchment population of over 51,000 in 2020. Additional employment growth of 15,500 has been targeted at the city areas including the Docklands, City Centre and Mahon and an additional 4,000 jobs has been targeted for Ballincollig.

Research and modelling assessment carried out as part of the preparation of this Update indicates that congestion due to increased car based journey times in the CASP area will increase by up to 57% in the absence of the provision of additional rapid transit corridors. Based on an assumption that 50% of the car based trips in the corridor catchment (500m each side of Rapid Transit Line) will be the key market for modal switch to an enhanced integrated public transport system it is estimated that the corridor from Mahon through the Bishopstown and Ballincollig will generate a patronage of the order of 3200 trips in the AM peak hour in 2025 with the future levels of population and employment. The modelling approach used the existing CASP traffic model which forecasts travel demand for a future year of 2025.

It should be noted that this level of peak hour trip generation would indicate that a Rapid Transit service may be justified on this corridor. However this will need to be verified by further detailed consideration of all day patronage potential, revenue streams, capital and operational costs and technical feasibility of detailed route options in the corridor. A key source of future levels of patronage for the rapid transit will be determined by the level of integration that can be achieved in the transport system particularly at the Interchange Hub at Kent Station.

Corridor 3: Airport-Tramore Rd-City-St. Lukes-Ballyvolane

This corridor will link the airport with the key employment zones at the airport business park with the City Centre. It will link the City Centre with the development areas to the north and north east of Ballyvolane. The Transportation Strategy being carried out by Cork City Council will investigate this route options for this corridor in greater detail.

It is currently estimated that the corridor population catchment is 21,313 within 500m of the centre of the indicative corridor line based on a detailed assessment of the CSO census data. The corridor length is 11.5km from the Airport to Ballyvolane.

The future levels of population and employment in the corridor and accessible by the integrated transport system will underpin the demand for transport services in this corridor.

The CASP Update has identified this as a key transport corridor linking the Airport with the identified growth area at Tramore Road and linking the City Centre with the designated growth areas on the northside at Ballyvolane. This corridor has the potential to be developed as a Rapid Transit corridor including BRT.

Additional population growth of 12,400 has been allocated between 2006 and 2020 in the corridor principally at Ballyvolane, City Centre and Tramore Road area in both city and county. This gives a total catchment population of over 33,000 in 2020. Additional employment growth of 15,500 has been targeted principally in the City and Docklands area with some 2000 additional jobs in the Ballyvolane area and 3000 in the Tramore Road area in both city and county. The Airport is a key transport hub and employment area including the nearby business park which currently support in the order of 4000 jobs. The integration of the transport system particularly at the city centre and Kent Station is needed in order to provide realistic competitive journey time alternative to car based commuters.

Research and modelling assessment carried out as part of the preparation of this Update indicates that congestion due to increased car based journey times in the CASP area will increase by up to 57% in the absence of the provision of additional rapid transit corridors. Based on an assumption that 50% of the car based trips in the corridor catchment (500m each side of Rapid Transit Line) will be the key market for modal switch to an enhanced integrated public transport system it is estimated that the corridor from Airport through the City Centre to Ballyvolane will generate a patronage of the order of 2400 trips in the AM peak hour in 2025.

It should be noted that this level of peak hour trip generation would indicate that a Rapid Transit service such as BRT could be justified on this corridor. However this will need to be verified by further detailed consideration of all day patronage potential, revenue streams, capital and operational costs and technical feasibility of detailed route options in the corridor. A key source of future levels of patronage for the rapid transit will be determined by the level of integration that can be achieved in the transport system particularly in the city centre and at the Interchange Hub at Kent Station.

The Black Ash Park and Ride site is located in this corridor and it currently provides an excellent service and performs an important role in removing car based trips from the city centre. It is envisaged that the P&R site will continue to play its key role in the corridor and a future feasibility study of the rapid transit options should consider how services could complement each other. In the longer term it is envisaged that role of the P&R sites closer to the city may evolve and change as P&R sites further from the city linked to rail and rapid transit take on a key role of intercepting city bound traffic.

Extension Corridors

The case for the development of additional corridors or extension of other rapid transit corridors should be investigated taking into account the scale location timing and sequencing of growth and development as follows:

- A green route to Ringaskiddy should be developed to support its role as a strategic employment growth area.

- An extension of Corridor 2 to Ballincollig should be considered to support additional allocation of growth to the town. This would increase the corridor catchment within 500m by 6,700 approx noting that the town of Ballincollig has a population of approx 26,000 people. The length of this extension would be approximately 5km. The timing and sequencing of this extension will be critical to the strategic management of the CASP spatial strategy.
- In the longer term consideration should be given to direct public transport links between the major development and employment zones at Mahon, Docklands, Tivoli and Little Island. Currently access to Little Island is predominantly car based and is therefore unsustainable and physically restricted by its existing accesses and the topography. Similarly the road based access options to Tivoli (including bus or BRT) are restricted by topography and the railway. In the long term there are opportunities to provide public transport links between Little Island with Mahon via Tivoli and the Docklands to complement the railway and other public transport and specifically to provide a competitive public transport alternative to car based access to the Docklands. This would provide a strategic sustainable public transport alternative to the major traffic movements through the Jack Lynch Tunnel which access the south east of the city through Mahon Interchange.

3.5.10 Park and Ride Strategy

Park and Ride facilities were identified in CASP on each of the major radial routes approaching Cork. These will have the benefit of reducing the number of cars entering the City and will hence ease congestion.

The Black Ash site near the Kinsale Road Interchange has been an outstanding success however progress on the remaining locations have been limited in delivering facilities on the ground. Where further locations are being investigated consideration should be given to locations that maximise the interception of city bound traffic and where possible they should intercept road traffic before it reaches the Cork Ring Road system, either the existing South Ring Road or the proposed Northern Ring Road.

Further opportunities for Park and Ride sites linked to the transport corridors should be considered in the context of the overall Integrated Transport Strategy.

The potential for the integration of the proposed Harbour Ferry Service within the rapid transport corridor to the Docklands should be considered as part of the detailed feasibility study.

This has the dual benefit of relieving the demand on the Ring Road and reducing the number of car based trips into the city centre. It is envisaged that the importance of the P&R sites at the outer locations such as Dunkettle, Blarney and Carrigaline will increase over time as demand for travel increases and the benefits of the integrated transport system are harnessed. An important element of these outer P&R sites will be the need to provide adequate priority for the P&R Bus services through the Ring Road junctions. In addition to these dedicated Park and Ride sites the parking provision made at the railway stations provides de facto rail based Park and Ride sites at Mallow and other intermediate stations in East Cork including Little Island and Glounthaune. Kent Station provides de facto Park and Ride for rail customers travelling to Dublin and elsewhere. In managing the overall parking provision in the CASP area, intercity passengers should be encouraged to use feeder rail and bus services to get to Kent Station as is envisaged by the vision for the Integrated Transport Strategy.

The preparation of the joint integrated parking policy should have particular regard to the provision of parking at park and rides sites and the appropriate levels of parking required at stations and rapid transit locations.

The key identified P&R locations include:

- Dunkettle & East Cork (rail based).
- Blarney and N20 (rail based).
- Northern Ring Road - there is scope to provide access to a potential P&R site at Ballyvolane based on the development of the North East Link to the Northern Ring Road
- N22 Carrigrohane Rd - this site has recently been identified by Cork City/Cork County Councils.
- N22 Ballincollig - there is potential to provide enhanced P& R at Ballincollig linked to the possible rapid transit corridor.
- South Western Suburbs

- Carrigaline – a site for P&R was identified as a requirement in CASP though recent studies have supported an alternative non bus based approach to meeting demand. This should be given further consideration in considering the extension of rapid transit to Ringaskiddy and Carrigaline.
- Glounthaune/Little Island - Current Park and Ride is limited to the parking capacity within the railway lands. The scope for additional parking should be considered within the framework of the joint parking policy.
- Kent Station - This currently serves intercity commuters but the current operating and pricing policy conflicts with the Park and Ride function and city parking policy. The future function, management and quantum of parking provision at Kent Station should be considered within the framework of the integrated parking policies and Kent Station should be secured for intercity travel.

The location, configuration and operation of each of these Park and Ride sites should be verified by more detailed studies as part of CASP implementation.

3.5.11 Slow Modes Infrastructure

Pedestrian and cycling facilities are an intrinsic part of the planning and implementation of the integrated transport network. A joint cycling and walking strategy is required for the CASP area which will ensure the delivery of the original CASP target to increase cycle use to 10 per cent of all journeys by 2020. The planning and implementation of pedestrian and cycle facilities as well as mobility impaired facilities should be an integral part of the preparation of the local road access infrastructure packages that are proposed for areas within 1km of existing and future commuter rail stations and rapid transit stops.

An initial measure identified in CASP was the development of 50km of dedicated cycleways in Cork City. There are key opportunities to develop an extensive cycle and walking network in each of the satellite towns and ring towns in the CASP area and these should be progressed through the local area plans.

There are additional opportunities for developing leisure and amenity cycleways including the development of an extensive cycle and footway network around Cork Harbour as part of a planned amenity corridor.

Both the cycling and pedestrian networks should be integrated with the joint strategy for the development of regional parks and amenity areas. A dedicated walking and cycling resource in the CASP office and in both City and County would strengthen the implementation of the CASP Strategy in this regard.

Cork City has a relatively high modal share for walking and cycling compared to other cities, reflecting the historical compact layout and form of the city. Census data however has shown that bicycle use as mode of transport to work school or college is declining. The provision of cycle networks and facilities is supported by the policy documents of both City and County and the City Council have identified a city cycle network and dedicated resource has been allocated to the implementation of cycling pedestrian and other soft measures.

As part of the programme to promote public transport and reduce car dependency, the proposed Green Routes network will be promoted as safe and accessible for cyclists. A cycling initiative will address the decline in cycling, in partnership with organisations with an interest in the promotion of cycling both for local transport, and for leisure/tourism. The approach will promote the use of the improved infrastructure to be offered by the Green Routes, greater integration with public transport, education/training and marketing. Bicycle parking will be provided on this network, and at key destinations in the City centre and towns. Within their Commuter Plans (or Mobility Management Plans), major employers will provide measures to ensure safe access to the work place by bicycle and will provide secure bicycle parking/ storage. Development Control policies to reflect this through planning conditions will be applied. Cycling is cost-effective, non-polluting, reduces congestion in urban areas, fosters improved health, and is accessible to young people.

In common with cyclists, motorcyclists are vulnerable road users and require specific consideration. They are also more efficient road users than low-occupancy cars and as such justify some priority.

Walking is cost-effective, healthy, non-polluting and reduces congestion. Most trips, even by car, have a walking component. As an activity in its own right, walking improves residents and visitors enjoyment of both the City and the countryside. Enhancement of the pedestrian environment is a cornerstone of any successful urban renewal initiative. Initiatives such as the Safe Routes to Schools project should be introduced throughout the Study Area in conjunction with the Department of Education and local schools.

Mobility and the Visually Impaired

A central part of the Integrated Transport System philosophy is the improvement of access and accessibility for all. The provision of suitable facilities for all transport users, whatever their physical ability will be mainstreamed within the planning design and operation of all transport services, particularly where these issues may not have been given prominence to date.

Waterbuses and Ferries

Waterbuses will be encouraged as commuter, tourist or leisure oriented venture possibly as part of the redevelopment of the Docks and also welcomed as part of Green Commuter Plans developed by or in partnership with the major employers in the Harbour. The existing Passage West Ferry will continue to play an important role, bolstered by the proposed Ballynoe Station on Great Island providing easy access between the rail network and Passage West

3.5.12 Road Transport

Strategic National Roads

Road improvements will be carried out as part of the Integrated Transport System. This means that their planning and provision will be co-ordinated with the provision of other transport modes.

The NRA has a statutory function in relation to the procurement and management of the national roads network which provides strategic road links between the gateways and hubs and other major urban areas and links to the major ports and airports.

The NRA has also published policy set out in “Policy Statement on Development Management and Access to National Roads” (May 2006) which provides policy guidance in relation to the management and control of development access onto the national roads network.

There is a considerable amount of committed road planning underway at present in the Study Area. The National Roads Authority (NRA), in conjunction with the local authorities, has proposals to upgrade all the radial routes into and out of Cork, and to upgrade the South Ring Road. The development of the N20 Blarney to Croom Route as part of the Atlantic Corridor to link the Gateway Cities of Cork, Galway, Limerick and Waterford will provide a high quality road network linking Cork with Limerick and Waterford.

These proposals have been included in the transport strategy. A Northern Ring crossing the River Lee and linking the N22 (Cork – Killarney road) to the N20 (Cork – Limerick road) and eventually to the N8 (Cork – Dublin road) has been developed to Preferred Route Stage and the NRA has identified as a priority the need to build the northern section between the N20 and the N8 as part of the Atlantic Corridor.

The CASP update recognises that the eastern section of the North Ring Road is extremely important and will be put in place as part of the Atlantic Corridor. There is also likely to be a need for appropriate strategic interchanges. The final decisions on any interchanges will be informed by the NRA review of interchanges currently underway and the findings of this updated strategy which identifies the economic development requirements of the CASP area.

Future possible interchanges will be dependent on on-going assessment and statutory processes which have yet to be undertaken for national road scheme proposals, including their consideration by An Bord Pleanála. The NRA believes that the inclusion of any specific possible interchanges is premature at this stage

The western link of the North Ring Road between the N20 and N22 is also important but it is accepted that this has a longer timeframe but should follow the delivery of the Eastern section.

The completion of the Northern Ring Road is important to the management of strategic through traffic which currently uses the city street network and provides a constraint on the implementation of a number of traffic management and urban improvement schemes. When the Northern Ring Road is in place there will be further scope to introduce more pedestrian and public transport friendly management schemes in the city centre, including consideration of the removal of through traffic on St Patrick Street and restricting it to public transport and taxis only.

The importance of access to and from the south and west areas of County Cork, to the ferry ports and to the airport is acknowledged. The improvements to the N71 as set out in the Road Needs Study, the improvement of the R586 and the upgrading of the N22 are considered a significant requirement of the transport policy to achieve balanced development of the Ring Towns.

HGVs and Strategic Traffic – Accessibility of Port and Airport

The Port of Cork and Cork Airport are two major economic actors in the CASP region and their efficient operation at a strategic level is based on their accessibility and connectivity with the wider region, primarily though not exclusively by the national roads network

The Port of Cork relies heavily on HGV traffic to deliver and distribute goods by the national roads network and is thus strategically reliant on the provision of a high quality national road network in the CASP area. Of particular importance are the implementation of the N28 and the full completion of the North Ring Road (East and West sections) in order to relieve pressure on the Jack Lynch Tunnel and the provision of grade separation at the Sarsfield and Bandon Road Interchanges.

The City Council has completed an Urban Freight Management Strategy which identifies a range of proposals to manage access and delivery of freight in the City Centre in particular. In the context of the relocation of Port of Cork activities to Ringaskiddy a HGV management strategy for the CASP area should be developed jointly by the County Council and City Council in consultation with the NRA, Port of Cork, Cork Airport and other key stakeholders including Bus Eireann and Iarnrod Eireann. HGV management needs are also relevant in the context of non Port related developments and a HGV strategy for the City has been prepared.

Critical Roads Infrastructure

The following road schemes are considered to be critical and essential to the growth and development of the CASP region and the achievement of the CASP goals:

- N28 Ringaskiddy Port Access Route;
- Eastern section of the North Ring Road;
- Appropriate Interchanges;

- N20 Cork Limerick –this route should be given priority as part of the Atlantic Corridor development policy;
- N72 Mallow Fermoy including key links to the N20 Atlantic Corridor;
- Jack Lynch Tunnel and Dunkettle Interchange Upgrade;
- N22 Macroom to Baile Bhuirne including Macroom Bypass;
- N8 Cork Dublin Motorway to be complete by 2010.

We would also suggest that consideration be given by the NRA to developing a future optimal layout at Dunkettle Interchange in order to address future capacity requirements.

The list of critical roads infrastructure identified for the CASP area identifies the principal schemes currently being considered by the National Roads Authority (NRA). In addition, various other schemes in the CASP area are also being considered by the NRA.

Non-National Roads Infrastructure

Non national roads infrastructure comprises over 95% of the route network in Ireland. Investment in non-national roads is critical to facilitate local mobility and accessibility. In order to leverage out the full benefits of investment in major elements of critical infrastructure appropriate parallel and complementary investment must be made in the non national roads network including provision for local access networks for pedestrians, cyclists and buses. The key elements of the non national roads infrastructure includes:

- Local Road Network Accessibility Packages focussed on Rail Access Nodes.
- Docklands Roads and Bridges Infrastructure.
- Access to Little Island, Tivoli and Docklands.
- Midleton Northern Relief Road.
- Mallow Northern Relief Road (former N72 proposal).
- Carrigaline Relief Road
- R634 Cobh Access Road

Docklands Infrastructure

The Docklands Local Area Plan sets out a clear programme of infrastructure requirements for the delivery of the plan. This should be prioritised in the short term to support the development of the Docklands. The key transport elements are:

- The Eastern Gateway bridge.
- Bridge at Water Street.
- Public transport bridge at Mill Road.
- Local roads infrastructure.
- The provision of a rapid transit link with the City Centre.

3.5.13 Port Infrastructure

The Port of Cork is a world class deep water harbour and the only port in Ireland that provides a deep sea facility, with a direct ro-ro service to the UK, Scandinavia, the Mediterranean and West Africa. The recently launched Cork Harbour Integrated Management Strategy outlines a strategy to bring all those involved in the development management and use of Cork Harbour together in a framework which encourages the integration of their interests and representatives to achieve common objectives in a sustainable manner.

It is also important to ensure that sufficient focus is given to the regional benefits which can be attributed to the scenic value of Cork Harbour. The resources of the harbour and waterways are significant not only in terms of transport but also in terms of developing leisure and amenity projects and meeting the requirements of the fishing community.

The Cork Area Strategic Plan and the Port of Cork's Strategic Development Plan are mutually reinforcing. Effective partnership of Cork City Council, Cork County Council and the Port of Cork is essential to the accomplishment of the both strategies. Within its Strategic Development Plan, which was completed in 2002, the Port of Cork sought to have the following sites included in the Cork Area Strategic Plan as areas for port use:

- Oyster Bank, Ringaskiddy;
- Ringaskiddy ADM Jetty;
- Ringaskiddy Basin;
- Dunkettle;
- Marino Point.

Intensification measures at Tivoli container terminal and at Ringaskiddy Deepwater Terminal could only provide short term relief and the Study (2002) concluded that in the medium term, the following new facilities would be required;

- A facility at Ringaskiddy Deepwater Terminal, incorporating the existing ADM jetty to cater for trades which were likely to be displaced from The City Quays to facilitate Docklands re-development;
- A new container terminal at the Oyster Bank, Ringaskiddy to replace the existing container terminal at Tivoli then reaching capacity;
- A new multi-purpose Ro Ro Berth within Ringaskiddy Basin.

Flexibility should be retained at the other sites to possibly develop new facilities in the longer term, should trade demands require them.

The Port of Cork contributes significantly to the well being of commerce, industry and tourism, not just of the Cork sub-region, but beyond, to the entire country. It impacts greatly on the heritage, cultural, environmental and recreational character of its hinterland. The Port of Cork is committed to its responsibility for promoting and regulating water based leisure facilities and activities. It is important that the harbour is utilised efficiently, enjoyed and managed for the benefit of all.

The Port of Cork Strategic Plan was aligned with the CASP goals and the CASP Strategy articulated the key linked benefits of the Port's strategy of relocating the Container Terminal from Tivoli to Ringaskiddy. Substantial progress had been made in advancing proposals for the new Container Terminal and multi-purpose Ro Ro Berth at Ringaskiddy.

The relocation of the container terminal would have the knock on strategic benefits of releasing lands for redevelopment at the Docklands and at Tivoli thereby supporting the CASP goals of consolidating the role of Cork City.

The Port of Cork is one of the major economic actors in the CASP region and its efficient operation at a strategic level is based on their accessibility and connectivity with the wider region, primarily though not exclusively by the national roads network.

The Port of Cork relies heavily on HGV traffic to deliver and distribute goods by the national roads network and is thus strategically reliant on the provision of a high quality national road network in the CASP area. Of particular importance are the implementation of the N28 and the full completion of the Northern Ring Road (East and West sections) in order to relieve pressure on the Jack Lynch Tunnel.

A recent decision by An Bord Pleanála, relating to a proposed container terminal at Ringaskiddy, has identified concerns regarding traffic impact at key locations on the road network and the lack of potential for the future transport of freight by rail in the Ringaskiddy area. The maintenance of modern port facilities and the need to release port related land in the Docklands and at Tivoli for mixed-use development formats are both critical to the overall strategy for the sustainable development of the CASP area and to the achievement of the target populations for the City.

The Planning Authorities in conjunction with the Port of Cork will need to carefully assess the issues raised by An Bord Pleanála in relation to Ringaskiddy regarding the scale and nature of future port development and possible alternatives.

3.5.14 Airport Infrastructure

The development and expansion of Cork Airport is crucial to the development and future prosperity of Cork. The economic development of the region will depend on inward investment and in-migration of labour. Continued improvements in air links and ease of access to both the UK and European hubs, is essential to fostering and promoting the Cork region as a high quality destination for inward investment and tourism.

Air services to and from Cork Airport currently provide vital links for business and tourism, and play a key role in attracting and retaining inward investment. Air freight is important for high value and perishable products. Owing to increased economic prosperity and the introduction of low-cost airlines, residents of the Cork area increasingly use the airport to access a wider range of social, cultural and leisure opportunities than is available locally. The airport's business is growing rapidly.

The area immediately adjacent to the airport is a key location for employment uses that would depend upon the proximity of the Airport for their viability. A quality bus corridor from the airport to the City centre and Kent Station will be developed with a high frequency service. Swift journey times and reliability will be ensured by the introduction of priority measures at the Kinsale Road Roundabout and the South City Link.

Cork Airport is currently managed under the auspices of Dublin Airport Authority pending the setting up of an independent Cork authority. The airport has benefited from a substantial development programme in recent years. Future capital expenditure will be towards maintaining appropriate service levels allowing for projected traffic at the Airport. The airport has currently only one road access and this presents difficulties due to congestion and lack of alternative access routes.

In terms of airport employment uses these are being dealt with in the Special Area Local Plan which is being prepared for Cork Airport to examine future needs and opportunities arising out of the development of Cork Airport. In this way the growth of Cork Airport can be ensured and its economic potential maximised.

The accessibility of Cork airport is a key issue for travelling passengers and key service providers. Access is currently predominantly by road including car drivers, car passengers (drop offs) and taxis. The airport currently manages a parking supply of some 4,600 spaces with the majority being long term. Access by road to the airport is currently dominated by the congestion and delay at Kinsale Road Roundabout though the recent completion of the Grade Separation scheme has brought some time savings, the key benefits were intended for the traffic on the N25 South Ring Road.

The introduction of the Green Route corridor has improved the level of public transport service level access although the key areas of demand growth has been related to the nearby employment centre at the airport business park.

In the future improved accessibility and connectivity to the wider region will be required by prioritising national road improvements including in particular:

- Cork Northern Ring Road (East and West).
- Cork South Ring Road Interchanges (Bandon and Sarsfield Road), subject to the funding of the NRA study.

A future rapid transit corridor linking the airport with the City Centre and Ballyvolane with interchange at the City Centre would improve the accessibility of the airport by public transport from the wider CASP area.

3.5.15 Water Services

The Water Services Act 2007 (SI30/2007) is a major update and consolidation of water services legislation in the state. The Act requires that each water services authority make a water service strategic plan with regard to the provision of water services in its functional area.

The Cork Strategic Water Plan provides recommendations for upgrading and improving infrastructure for delivery of potable to cater for demand over the next 20-25 years. A similar strategic plan is required for wastewater, to ensure an integrated and co-ordinated approach to the upgrading of the wastewater infrastructure to accommodate future demand in the CASP region. "City Environs (CASP) Strategic Study - Northern Catchment Feasibility Study", the first portion of this study, is expected to commence in 2008.

The implementation of recommendations contained in current and future strategic plans must be prioritised as it is key to ensuring that water and drainage services, are provided in advance or in tandem with housing and other development.

The single most important potable water source within the CASP boundary is the Treatment Plant in Inniscarra.

Construction has commenced on a capacity upgrade, which will increase plant output to approximately 40% of source capacity (90 MI/Day).

Planning for Water Supply infrastructure for Monard has already commenced with the project due for delivery prior to North Ring Road Construction. Plans to expand the Cork Harbour & City Scheme to service Midleton, Blarney, Rathpeacon suggests that planning for the modular expansion of the plant beyond the 90MI/Day capacity should now commence.

Of equal importance is the proposed upgrade at the Lee Road Treatment Works which has been delayed but which is now anticipated to proceed to construction in 2009. This is critical to facilitate future development within the City in the short to medium term, but in the long term treatment capacity will need to be extended to full source capacity.

The construction of a new trunk main to supply water from Glashaboy WSS to the Docklands is critical to facilitating development. Construction is scheduled to commence in 2008. To ensure future security of supply to the Docklands, a main from the Cork Harbour and City scheme at Mahon is being considered, although it is questionable whether this can currently be considered as critical infrastructure. The main from Glashaboy WSS to the Docklands will also serve Tivoli.

Major new water supply infrastructure is required to facilitate the future development of Monard. The Cork Harbour & City scheme has been identified as the supply headworks, and large investment in trunk mains, storage, and a distribution network are required. It was envisaged that the trunk main construction would coincide with the route and construction of the western section of the proposed North Ring Road. However contingency arrangements to deliver an adequate supply to Monard are being considered.

The proposed trunk mains would also facilitate a future supply to Blarney, required to provide for the long-term development of the Blarney SLAP area. This area would require an interim supply from the Blarney scheme, including a new reservoir.

In the medium to long term, an extension of the Cork Harbour and City scheme trunk mains will, will be required to facilitate development in Middleton, as well as providing additional storage. The trunk main extension has been included as part of a recent Gateway Innovation Fund proposal.

The completion of identified improvements to existing water supply schemes in Youghal, Mallow and Middleton is also critical to the success of the CASP strategy.

The Cork Lower Harbour Sewerage Scheme which was recognised as being urgently required in CASP, has progressed slowly through the design and planning stages. Its construction, now forecast to commence in 2010, will provide much needed treatment capacity, facilitating development in the settlements of Carrigaline, Ringaskiddy, and Cobh.

In addition the implementation of proposed treatment/network upgrades in Middleton, Kinsale, Ballincollig, Youghal, and Carrigtohill is urgently required.

3.5.16 Telecommunications

Advanced and competitive telecommunications is critical to support the CASP area's development.

Cork's emphasis on high technology industries and the proposed new focus on knowledge-intensive services, means that advanced telecommunications infrastructure is strategically important for both domestic and overseas manufacturing and services enterprises. In addition, in an increasingly knowledge-intensive economy, companies within the region are harnessing technology to drive productivity improvements and add value. In this context, on-going monitoring of the appropriate telecommunications infrastructure and services should be undertaken by the CASP office. It may also be important for CASP to respond to any consultations which will arise from the Government's 'Review of Broadband Strategy'. Issues which should be given attention are international connectivity, region wide wi-fi and broadband connectivity, a national NGN Broadband network, and access to MANS. The feasibility of a second international connectivity link for Cork is relevant in this context. The telecom requirements of all significant locations for growth should be identified. A useful model for this is the Draft Telecom Strategy for Cork Docklands which has been presented to the Docklands Policy Committee.

3.5.17 Waste Management

The provision of waste management infrastructure is critical to support the sustainable development of all sectors in the CASP region including the industrial, commercial, service and residential sectors. The provision of waste infrastructure, as outlined in the Cork City and County Waste Management Plans, should be prioritised in line with the EU Waste Hierarchy.

3.5.18 Summary of Infrastructural Requirements

As noted above, in considering the spatial option as part of the Update of CASP, it is essential to adopt a realistic and policy driven economic strategy and to ensure that the recommended strategy is supported by adequate infrastructure. A summary of some of the key infrastructural requirements have been presented in the Report.

The prioritisation of projects is indicated in a table in the appendix, as well as indicative costings for these projects where the information is available. In some cases, detailed costings require further analysis. For example, in relation to the rapid transit corridors estimates of costs and funding will form part of the feasibility study which is underway. The costs of some of the national road projects and possible interchanges will be evaluated by the NRA at the appropriate stage. The main source of funding for the infrastructure projects will be the NDP and the current and future rounds of the Gateway Innovation Fund (GIF) and Local Development Contributions. There is also some potential for PPP financing

There is also potential for private sector funding for certain projects, although public sector infrastructural support will be required. One of the priority tasks for the CASP implementation team will be to secure funding for the critical strategic infrastructure.

It is essential that the CASP implementation teams work to ensure that the infrastructure is developed. This is necessary as the CASP update should form the basis of a working business plan that provides the template for ensuring Cork's continued growth and prosperity well into the future.

4 Phasing the Strategic Plan

4.1 Introduction

Whilst the original CASP strategy presented incremental phasing towards the achievement of the 2020 targets across four tranches, as part of this Update we confine our analysis to the two remaining phases out to 2020, namely Tranche 2 (2007-2013) and Tranche 3 (2014-2020). The proposed Phasing behind the household development required in order to achieve population (and thus household) 2020 targets, as part of this Update reflects a number of planning considerations and therefore differs in its precise tranching allocation by sub area to those proportions suggested in CASP (2001).

The proposed tranching of households out to 2020 presented below represents a change on the original CASP phasing in that it imposes an incremental decline in average housing densities across the two remaining tranches, such that the overall stock of households by 2020 posits an average density of 2.41. Details of the proposed phasing of necessary household formation across these two tranches are outlined by CASP sub-area in the tables below.

It is proposed that a tranche system would continue to be employed to direct growth to particular locations within given timeframes. This essentially sees the updating of the existing CASP Tranches 2 and 3 with revised population and employment targets for specified locations based on the agreed spatial development strategy.

The Spatial Strategy envisages that growth would first (under an updated Tranche 2) be directed to locations along the heavy rail line to the north and east of the City, as well as to the Docklands in order to allow growth to be delivered in these locations as projected under the original CASP. Growth in the next tranche (an updated Tranche 3) would then be directed to other locations. This approach would essentially allow for the growth envisaged under the original CASP to occur before any strategic adjustments put forward in the Update would come into effect.

It is considered that all locations will accommodate a certain level of natural and incremental growth in population and employment over the period. In addition, while the proposed spatial development strategy would see the direction of development and growth focused on identified employment locations; this is not to say that other existing employment locations will not continue to fulfil their strategic roles within the sub region's economy.

The rationale for redirection of growth to south, north and west of the City in Tranche 3 2014-2020 is premised on the following objectives:

- It supports the viability to deliver a new potential rapid transit public transport corridors in the city, one focused on linking Docklands with Mahon, the City Centre and the west of the city and the other linking the airport with the city centre and the new development area at Ballyvolane on the northside of the City;
- The opportunity to consolidate growth in more sustainable areas, approximate to the City Centre;
- The desirability to create a more integrated public transport system in the city capable of moving significant volumes of population between population and employment centres, both existing and emerging;
- The emerging difficulties in delivering high quality public transport to the south and west of the city. (i.e. the capacity of the Green routes to deliver the envisaged modal shift to public transport and the need to change the perception of public transport in these areas);
- The proximity of existing and emerging employment nodes on this southwest – southeast axis, specifically Mahon, Docklands and Bishopstown;
- The desirability to provide high quality public transport to existing educational and health institutions in the southwest of the City and enhance their connectivity with the rest of the city and the CASP area

Updated Tranche 2: 2007-2013

Tranche 2 should see the consolidation of existing growth on the rail corridor to the north and east of the City to build on the significant momentum gained through committed public investment and avail of the favourable planning policy provisions that have been put in place.

This tranche would see the densification of existing growth locations at Midleton, Mallow, Carrigtwohill and Cobh with some expansion to each of these towns.

It would see large-scale redevelopment of the Docklands area as envisaged in both the South and North Docks Local Area Plans with the delivery of significant populations in both areas. Blackpool (employment and residential uses) and Mahon (employment) should also see strong growth in this period.

The resolution of a number of critical infrastructure issues would need to be progressed in the immediate short term, particularly in relation to the Docklands and Mallow. There is a need for the provision of rapid transit option early in the development of the Docklands in particular. Two impediments to the development of Docklands are the cost of infrastructure works and the timeframe for their implementation.

It is vital that there is certainty on the costs arising from the infrastructure required to service the Docklands area and these include certainty around the overall capital costs, public funding supports and methodology for applying development contributions to capture the remainder. This is a priority to be tackled through the Docklands Forum and of equal importance is the need to commit to vital infrastructure in a timely manner. In addition, difficulties experienced in the delivery of development on the rail corridor would need immediate resolution particularly with regard to infrastructure provision and masterplanning.

The delivery of development along the rail corridor needs to progress and in this regard there are critical infrastructural deficits are urgently resolved. This is particularly relevant for Blarney given recent experiences. It is noted that the rail line to Midleton will open in 2009 and the first phases of the Midleton relief road has commenced construction. There is a need for the delivery of a Masterplan for the new residential development at Waterrock. This same issue applies to the new neighbour planned at Carrigtwohill. Drawing on lessons learned from the Blarney experience, the Council should take a leading role in organising and preparing the required Masterplans.

Mallow has the benefit of a new Special Local Area Plan, but there are obstacles to the significant delivery of development in newly identified neighbourhoods, namely the provision of the appropriate Road infrastructure and connection to the rail network is needed. These issues coupled with water and wastewater infrastructure are fundamental to the delivery of growth aspirations for Mallow as set out in policy at all levels. We note that Flood relief works at Mallow are under construction.

Tranche 2 would also see the expansion and consolidation of the Airport Business Park, and the delivery addition airport-related services at the Airport itself, in the context of the Airport Special Local Area Plan.

In this tranche policies would also be put in place to prepare for the delivery of growth targets in Tranche 3. In this the preparation of Local Areas Plans or Masterplans for identified growth locations would be progressed, as would measures to ensure development is infrastructure led.

Updated Tranche 3: 2014-2020

This Tranche would see the development of growth areas approximate to the City, namely Ballyvolane, Ballincollig, and Tramore Road. Lands identified for development would at this stage ideally have the benefit of local areas plans or other planning policy objectives similar to the special local Area Plans put in place for towns on the rail corridor.

Similarly, development within the City would continue to be advanced. Docklands and Blackpool would be the focused of strong continued growth as would Mahon and Tramore Road. Each again would have strong planning policy provision in place to guide development over the period.

Development in this Tranche would essentially be geared towards supporting the establishment of two further potential public transport corridors in the City Region: an east-west corridor running from Mahon, through Docklands, to Ballincollig and a north-south corridor from the Airport, through Docklands to Ballyvolane. Growth in the towns along the heavy rail would in this tranche now be fully realised, as envisaged.

Given that most of the local area plans for the region will be undertaken in the next two to three years, there should be some flexibility to bring forward some the of the Tranche 3 development, particularly of suburban business parks. In addition, the proposed LAP for Tivoli will be prepared in this updated Tranche 3.

4.2 Overall Strategy

Across the CASP area as a whole development will be spread roughly evenly over the Tranches; between Tranche 2 (47%) and Tranche 3 (53%).

Table 4.1 - Phasing Programme for Housing -CASP Area

Area	Current No. Households (2006)	Proposed 2020 Projection	Additional No. of Households Proposed	
			Tranche 2 Ave density 2.61	Tranche 3 Ave. density 2.41
Cork City	43,971	62,241	6,396	11,874
Rest of Metropolitan Cork	50,889	89,726	18,906	19,931
Ring Towns and Rural Areas	35,788	50,525	7,230	7,507
CASP Total	130,648	202,492	32,532	39,312

Source: Indecon/RPS analysis of CSO SAPS Data, CASP 2001 Targets. These household target calculations are formulated using the average household density figure of 2.61 implied within the Draft Housing Strategy (Blackwell) for Tranche 2 and a somewhat lower figure of 2.41 as suggested in the Strategy by 2020.

The proposed population for each tranche in the CASP area is as follows:

Table 4.2 - Phasing Programme for Population - CASP Area

Area	Current Population (2006)	Proposed 2020 Projection	Additional Population Proposed	
			Tranche 2	Tranche 3
Cork City	119,522	150,000	11,935	18,543
Rest of Metropolitan Cork	153,019	216,240	29,145	34,076
Ring Towns and Rural Areas	105,055	121,760	7,221	9,484
CASP Total	377,596	488,000	49,186	61,218

Source: Indecon/RPS analysis of CSO SAPS Data, CASP 2001 Targets.

4.3 Phasing Programme for Cork City

Allocating the required additional number of households by sub area within the City, it can be seen from the Table below that there will be a greater concentration in household development in the northwest of the City during Tranche 2. In contrast, southeast cork will require a greater concentration household formation in the later Tranche 3 reflecting a number of planning considerations. Each of the remaining sub-areas within the City, are envisaged as experiencing a fairly balanced approach toward the achievement of their 2020 target across the two remaining tranches.

Table 4.3 - Phasing Programme for Housing - Cork City

Area	Current No. Households (2006)	Proposed 2020 Projection	Additional No. of Households Proposed	
			Tranche 2	Tranche 3
Central Cork	3,228	4,682	545	909
Northeast Cork	8,278	9,993	668	1,047
Northwest Cork	9,764	12,539	1,331	1,444
Southwest Cork	13,743	16,344	923	1,678
Southeast Cork	8,958	18,683	2,929	6,796
Cork City	43,971	62,241	6,396	11,874

Source: Indecon/RPS analysis of CSO SAPS Data, CASP 2001 Targets. These household target calculations are formulated using the average household density figure of 2.61 implied within the Draft Housing Strategy (Blackwell) for Tranche 2 and a somewhat lower figure of 2.41 as suggested in the Strategy by 2020.

The proposed population for each tranche in Cork City is as follows:

Table 4.4 - Phasing Programme for Population - Cork City

Area	Current Population (2006)	Proposed 2020 Projection	Additional Population Projected	
			Tranche 2	Tranche 3
Central Cork	8,094	11,283	1,753	1,436
Northeast Cork	22,387	24,084	964	733
Northwest Cork	26,601	30,218	2,356	1,261
Southwest Cork	37,120	39,390	1,157	1,113
Southeast Cork	25,320	45,025	5,705	14,000
Cork City	119,522	150,000	11,935	18,543

Source: Indecon/RPS analysis of CSO SAPS Data, CASP 2001 Targets.

4.4 Phasing Programme for Metropolitan Cork

Delay in the delivery of some of the necessary supporting infrastructure elements has left the current Phase outlined in the original CASP strategy (end T1+) somewhat behind target. It is anticipated that greater household development will be concentrated within Tranche 2 in the areas of Carrigtwohill and Midleton Hinterland, and Blarney. It is proposed to allocate moderately more households under Tranche 3 in the areas of Monard Rathpeacon and Whitechurch.

Table 4.5 - Phasing Programme for Housing - Rest of Metropolitan Cork

Area	Current No. Households (2006)	Proposed 2020 Projection	Additional No. of Households Proposed	
			Tranche 2	Tranche 3
Ballincollig and its Hinterland	8,656	13,830	2,128	3,045
Ballyvolane	2,271	5,596	945	2,380
Blarney and Hinterland	5,091	9,873	3,364	1,418
Carrigaline and Ringaskiddy	4,260	5,926	904	762
Carrigtwohill & Midleton Hinterland	3,326	8,426	3,087	2,013
Cobh Town	4,605	6,792	776	1,412
Crosshaven/Myrtleville	1,145	1,664	210	309
Douglas/South City Environs	9,217	12,490	1,585	1,688
Carrigaline Hinterland	1,221	1,736	344	171
Glanmire / Riverstown	1,745	2,434	447	242
Glounthane and Little Island	2,064	2,856	510	282
Midleton Town	3,641	9,722	3,826	2,255
Monard/Rathpeacon/Whitechurch	667	4,628	341	3,620
Monkstown and Passage West	1,971	2,382	212	199
Whitegate/Aghada	1,009	1,371	227	135
Metropolitan Cork	50,889	89,726	18,906	19,931

Source: Indecon/RPS analysis of CSO SAPS Data, CASP 2001 Targets. These household target calculations are formulated using the average household density figure of 2.61 implied within the Draft Housing Strategy (Blackwell) for Tranche 2 and a somewhat lower figure of 2.41 as suggested in the Strategy by 2020.

The proposed population for each tranche in the rest of Metropolitan Cork is as follows:

Table 4.6 - Phasing Programme for Population of Rest of Metropolitan Cork

Area	Current Population (2006)	Proposed 2020 Projection	Additional Population Projected	
			Tranche 2	Tranche 3
Ballincollig and its Hinterland	26,419	33,330	1,728	5,183
Ballyvolane	7,118	13,495	1,275	5,102
Blarney and Hinterland	16,043	23,793	6,025	1,725
Carrigaline and Ringaskiddy	12,677	14,280	802	801
Carrigtwohill & Midleton Hinterland	9,685	20,303	7,052	3,566
Cobh Town	12,880	16,370	1,163	2,327
Crosshaven/Myrtleville	3,061	4,010	475	474
Douglas/South City Environs	27,716	30,102	477	1,909
Carrigaline Hinterland	3,985	4,184	100	99
Glanmire / Riverstown	5,583	5,862	139	140
Glounthane and Little Island	6,555	6,883	164	164
Midleton Town	10,315	23,429	9,174	3,940
Monard/Rathpeacon/Whitechurch	2,183	11,153	448	8,522
Monkstown and Passage West	5,650	5,740	45	45
Whitegate/Aghada	3,149	3,306	78	79
Metropolitan Cork	153,019	216,240	29,145	34,076

Source: Indecon/RPS analysis of CSO SAPS Data, CASP 2001 Targets.

4.5 Phasing Programme for Ring Towns and Rural Areas

Unlike CASP (2001), which anticipated Mallow town would receive the greater portion of household development during Tranche 2, due to outstanding planning considerations it is now considered prudent that Mallow experience more growth in households during Tranche 3.

Table 4.7 – Phasing Programme for Housing – Ring Towns & Rural Areas

Area	Current No. Households (2006)	Proposed 2020 Projection	Additional No. of Households Proposed	
			Tranche 2	Tranche 3
Bandon Town	3,191	3,925	379	355
Bandon Hinterland	3,615	4,731	732	384
Macroon Town	1,244	2,108	382	482
Macroon Hinterland	3,145	4,068	590	333
Mallow Town	4,125	8,299	1,421	2,753
Mallow Hinterland	3,470	4,520	682	368
Fermoy Town	2,343	3,904	715	846
Fermoy Hinterland	4,143	5,218	652	423
Youghal Town	2,619	4,004	603	782
Youghal Hinterland	3,640	4,536	527	369
Kinsale Town	2,169	2,551	180	202
Kinsale Hinterland	2,084	2,661	367	210
Ring Towns and Rural Areas	35,788	50,525	7,230	7,507

Source: Indecon/RPS analysis of CSO SAPS Data, CASP 2001 Targets. These household target calculations are formulated using the average household density figure of 2.61 implied within the Draft Housing Strategy (Blackwell) for Tranche 2 and a somewhat lower figure of 2.41 as suggested in the Strategy by 2020.

The proposed population for each tranche in the Ring Towns & Rural areas is as follows:

Table 4.8 – Phasing Programme for Population– Ring Town & Rural areas

Area	Current Population (2006)	Proposed 2020 Projection	Additional Projected Population	
			Tranche 2	Tranche 3
Bandon Town	9,174	9,460	143	143
Bandon Hinterland	11,289	11,402	56	57
Macroon Town	3,407	5,080	836	837
Macroon Hinterland	9,701	9,798	48	49
Mallow Town	11,211	20,000	3,265	5,524
Mallow Hinterland	10,783	10,891	54	54
Fermoy Town	6,551	9,410	1,429	1,430
Fermoy Hinterland	12,452	12,577	63	62
Youghal Town	7,167	9,650	1,241	1,242
Youghal Hinterland	10,823	10,931	54	54
Kinsale Town	6,117	6,147	15	15
Kinsale Hinterland	6,380	6,414	17	17
Ring Towns and Rural Areas	105,055	121,760	7,221	9,484

Source: Indecon/RPS analysis of CSO SAPS Data, CASP 2001 Targets.

5 Implementing the Strategic Plan

It is essential that there is a sufficiently empowered implementation system responsible for driving forward the objectives of CASP. Implementation needs to take account of the fact that CASP requires not only effective spatial planning integration, but also co-ordinated policies on employment, transport, education and infrastructure. The key is to ensure that the City and its Metropolitan area are developed as a single unit, in order to ensure that the CASP area becomes a real driver of the economy. A clear mechanism for implementing the strategy has been specified to ensure the objective of enhancing the economic performance of CASP will be achieved. For this reason, the updated CASP Strategy has focused not only on developing the appropriate Strategy, but on outlining clear mechanisms for implementation and on how to achieve the targets set. These are outlined in more detail below.

It is critical as part of implementation that the proposed phasing of development is adhered to, that planning decisions are consistent with the policies agreed in the CASP update, and that effective monitoring arrangements are in place to give early warning of unsustainable trends. The CASP Plan and phasing is dependent on implementation of all the CASP proposals. Front-loading of infrastructure is essential to implementation of the phasing proposed.

As part of the implementation plan, a key first task is for the CASP Steering Committee is to assign ownership of specific issues to individual organisations who have a regional representation within the areas relevant to CASP, such as employment growth, skills strategy, transport planning, place marketing etc. This would include formal recognition of the role of the CASP collective partners beyond that of the local authorities, as CASP cannot be implemented by the local authorities on their own.

There is a need for Cork to speak with one voice on CASP issues and the need to identify mechanisms to strengthen co-operation between the relevant stakeholders is a critical output of the CASP Update.

The prioritisation of development based on sustainability is reflected in the phasing, whereby growth will be first directed along the rail line and in the City and Docklands.

The proposed update of CASP requires action in a number of key areas including, spatial and land use planning, economic and investment strategy, infrastructure and transportation, Docklands development and labour force skills. The key to success lies in the structures and processes adopted to implement the various elements of the Strategy. It also requires national support in addition to initiatives within CASP. A number of issues will be critical to the successful implementation of this update strategy including the overall CASP governance structures, the effective marketing of the CASP area, funding availability and an appropriate monitoring framework. Key issues include:

- ❑ The institutional processes and arrangements to oversee the implementation of the Strategy that need to be put in place or revised;
- ❑ The marketing of the CASP region;
- ❑ Issues concerned with the funding of major infrastructural projects required for the successful implementation of the Strategy;
- ❑ The indicators to be used to monitor the implementation of the CASP.

5.1 Institutional Processes

5.1.1 Existing Arrangements

On foot of the original CASP Strategy, a number of structures were put in place to oversee the co-ordination and implementation of the Strategy. These include two committees – the CASP Policy Committee (or Monitoring Committee) and the CASP Steering Committee. These committees are supported by the CASP Office which is headed-up by a CASP Co-ordinator post and which is supported by both the Cork County and City Councils.

The CASP Policy Committee is comprised of 10 elected members of both the City and County Councils. The Committee meets four times a year with the Chairmanship function rotating between the two authorities. The aim of the Committee is to consider policy issues associated with the delivery of the CASP Strategy and to make recommendations to and solicit the support of the respective Councils for these policies. The Committee also has a role in interacting with both government departments and agencies to secure funding commitments to CASP projects and to ensure timely delivery of such projects.

The CASP Steering Committee is chaired by the County and City Managers, again on a rotating basis. This Committee includes representatives from key government departments and agencies and other stakeholders in the CASP area as follows:

- ❑ Department of Transport;
- ❑ Department of the Environment, Heritage and Local Government;
- ❑ Construction Industry Federation;
- ❑ Cork Chamber;
- ❑ Enterprise Ireland;
- ❑ Iarnrod Eireann;
- ❑ Bus Eireann;
- ❑ ESB;
- ❑ Cork Institute of Technology;
- ❑ IDA;
- ❑ UCC;
- ❑ NRA;
- ❑ Port of Cork;
- ❑ Cork Airport.

This Committee again meets on a quarterly basis. Its role is to monitor and drive plan implementation, with a particular focus on delivering CASP infrastructure projects to timescale. It also has a role in supporting separate agencies and authorities operating within the Region and, where necessary, taking steps to secure Government commitment.

Both of these committees are serviced by the CASP Co-ordinator operating out of the CASP Office. The Co-ordinator also acts as a liaison point between the various departments of both local authorities and between other agencies operating in the CASP area. The Co-ordinator also prepares CASP monitoring reports for the Policy and Steering Committees and other local authority committees and has a role in disseminating the CASP through presentations to conferences, seminars etc.

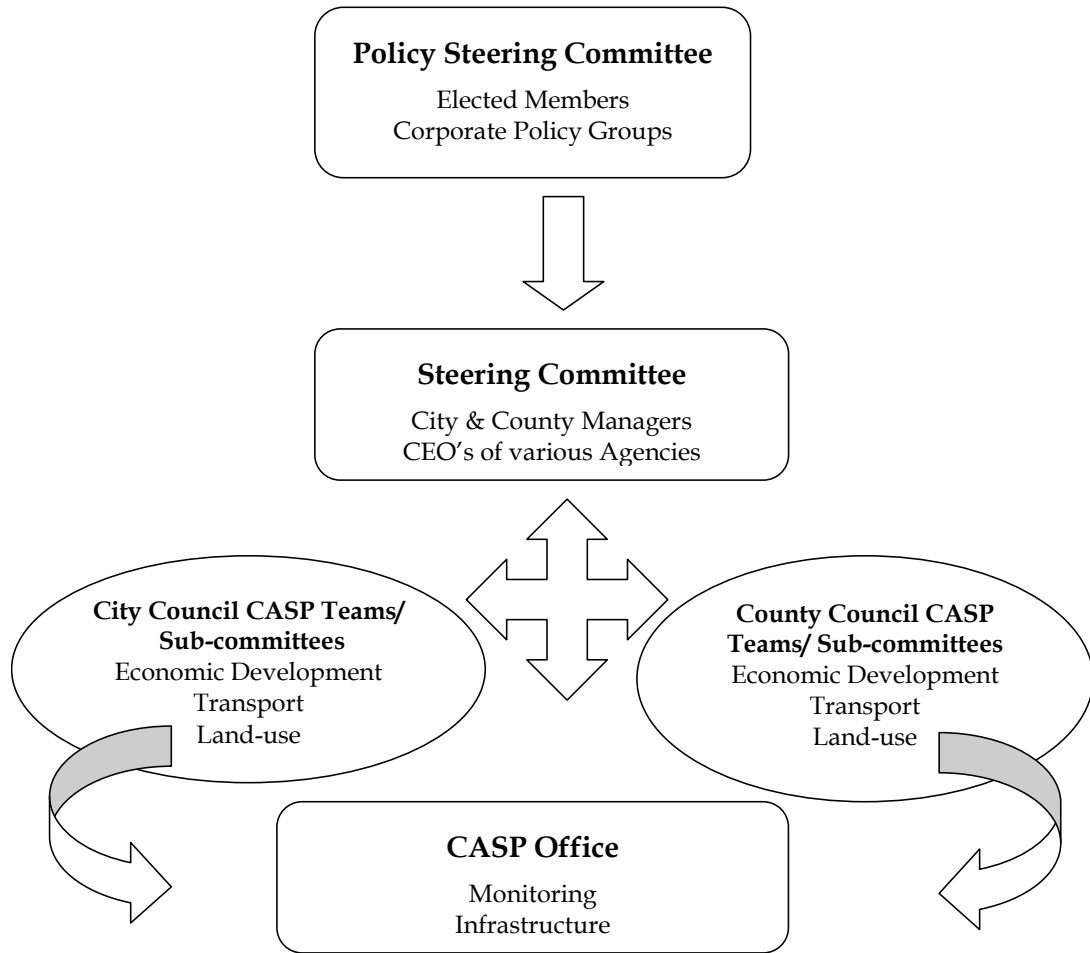
5.1.2 Proposed Institutional Enhancements

The structures described above have been important in providing dedicated CASP structures and an ongoing focus for the implementation of the CASP Strategy. The arrangements are also characterised by a number of innovative features in an Irish public administration context, including the joint City/Council representation and chairmanship of the Policy and Steering Committees, the involvement of relevant Government departments and agencies and other local stakeholders and the presence of a dedicated CASP Office and Co-ordinator. However, building on the experience and progress made to date, there is a need to upgrade and enhance the structures if the ambitious targets for the Strategy are to be met. A number of specific enhancements are proposed.

A key requirement is to put in place nominated CASP-specific teams in both the City and County Councils dealing with the core aspects of economic development, transport and land use issues. Additional high quality professional skills in economic development will be needed to ensure strategies take account of economic and market realities. It is proposed that officials dealing with economic development, transportation and land use policies would be attached to their respective local authority but would be focused on CASP implementation. These teams would work closely with relevant departments in the local authorities and with other agencies, as appropriate. Their work should be overseen by committees with representatives of each local authority and of other relevant government departments and agencies. These committees would, in effect, act as sub-committees of the CASP Steering Committee. In line with current arrangements, the work of these sub-committees would be co-ordinated and serviced by the CASP Office. This might require some additional staff to be allocated to the CASP Office.

A summary of the proposed revised CASP implementation structure is presented below.

Figure 5.1: Proposed revised CASP Implementation Structure



Source: Indecon analysis. Note the proposed structure involves additional joint working initiatives and we envisage significant linkages for communication between the CASP Office and the City and County Councils.

5.1.3 Policy Development

As identified in the original CASP Strategy, the preparation of local area plans is an important tool in the implementation of the Strategy.

This will be of particular importance in areas where a substantial level of development is envisaged, in order to ensure that the required services are put in place at the appropriate juncture and that development proceeds in a co-ordinated and sustainable manner. It is also essential that integrated local transport plans are implemented.

With regard to implementation, and in recognition that the physical extent of urban areas do not always correlate with administrative boundaries, a key area will be the co-ordination of new policy development between the various local authorities, particularly the City and County Councils and between the County Council and the various Town Councils. Acknowledging the success of the both the Joint Retail and Housing Strategies in co-ordination and guiding development in their respective areas, it is envisaged that there will be liaison between local authorities in addressing and responding to key issues of mutual interest, including;

- Local Area Planning at Ballyvolane and Tramore Road;
- Car Parking Strategies; and
- Recreation and Amenity.

The promotion of partnership and joint working relationships between the local authorities by the joint preparation of new Local Area Plans for identified growth areas. The preparation of joint LAPs should also allow for the development of more integrated thinking with regard to recreation and parking policy and zoning objectives. In a similar fashion the preparation of Town and Environs Plans between the County and Town Councils merits consideration. It is also clear given difficulties with identified growth locations that Local Authorities will have to take a lead in the preparation and finalisation of masterplanning.

In light of the emergence of pressures on sports facilities within the City administrative area and the threat of their relocation to County areas it is essential that there is close co-operation and integration of responses from both Councils. The need for such co-ordination is also affirmed given the revised population targets for the city urban area. A revised population target of 150,000 for the city proper along with growth within areas contiguous to the administrative area will require the co-ordinated provision of recreation and amenity facilities of high quality. Continuity between City and Council Joint Recreation Strategies would necessarily address the following the role and function of Greenbelts to provide for the passive and active recreational needs of the urban populations both in the City and in Metropolitan and Ring towns. Adjustments may need to ensure sustainable development being close to key infrastructure areas. Consideration should also be given to the development of regional parks close to the City in the following locations:

- The extension of the Lee fields to Ballincollig Regional Park to create a park of real regional significance and recognition of the need to replace existing sports facilities to the west of the City, recently rezoned.
- The extension of the Glen Amenity park into the new growth location at Ballyvolane to create a park of significant size in the northeast of the city and provide for amenity linkages into Blackpool
- The consolidation of the parklands in the Mahon area and the development of linkages with the proposed park in the South Docklands
- The development of a regional park in the northwest of the City beyond Knocknaheeny in the Kilnap area
- The redevelopment of the City landfill site as a regional park and the development of amenity linkages along the Tramore River through the new identified growth location in Tramore.

The Strategy should also address the potential loss of amenity value and recreational need arising from relocation. It is considered that the retention of such facilities in close proximity to existing populations is in line with the original CASP Goal of social inclusion and the overall aim of providing for a high quality living environment within the region. This is a significant issue going forward given that the revised strategy looks at directing significant population growth to city proper and adjoining urban locations. The Strategy should also look at the development of co-ordinated local plans or increased co-operation for each of the metropolitan and ring towns to ensure that recreational facilities are firstly provided at a scale commensurate with the level of growth envisaged and secondly accessible to all.

The development of office strategies for Cork City and County Councils should be co-ordinated to be consistent with CASP goals and this will require close co-operation and liaison in the preparation of individual City and Council policies. This should build on the economic strategy outlined in this document creating a hierarchy of strategic locations and identifying an appropriate distribution of employment functions across the sub region. Its preparation can be considered even more relevant in light of the trends evidenced in the 2000-2007 period, which saw the establishment of a suburban office market contrary to the vision outlined in the original CASP. The management and development of this suburban office market must be co-ordinated with the delivery of significant office functions within the primary growth locations of Docklands and the City Centre while also responding to the changing requirements in terms of business locations, the need to development accessible strategic employment locations and the overall aim of developing a well structured and robust economy in the sub region.

With regard to one-off housing development and the subsequent growth of populations in rural areas of the Ring towns, it is clear that the rural control zone as defined in the Draft County Development Plan and the unzoned areas outside of this and within the CASP region are now under significant urban pressure. It is also clear that existing policy has not been effective in achieving the targets set out in the original CASP to control such growth as articulated through the aims of the County Settlement Strategy. The continuation of existing trends and the subsequent population distributions would undermine the achievement of key CASP Goals and lead to a highly unsustainable pattern of development across the region. This needs to be addressed as part of the implementation of the proposed updated CASP.

Other areas of policy development, some of which have arisen out of the revised CASP Strategies Strategic Environmental Assessment (SEA), include the adoption of policies to ensure the development of compact, functional and sustainable urban centres looking at densification and mechanisms for the achievement of higher densities, particularly in locations close to public transport corridors; the development policies in relation to renewable energy and sustainable building practice including the preparation of sustainability checklists to further embed the concept and goals of sustainable development in the regions planning process and the creation of environmental datasets to aid the implementation of environmental policy and monitor environmental impacts of development.

5.2 Marketing and Branding

The original CASP Strategy placed particular emphasis on the need for effective place marketing of the Cork area. A number of key elements were deemed necessary, including an annual benchmarking programme which would measure Cork's performance and ongoing development against leading European sub-regions, the building of a set of Cork brand values and the development of flagship projects. Innovation, broadly defined, was also seen as an important element in a Cork place marketing programme.

A number of marketing initiatives have been put in place in recent years. The *CASP Progress Report 2006* refers to the production of separate brochures by Cork City and County Councils, entitled *Strategic Cork* and *Bringing Your Business to Cork is Plain Sailing* respectively. Both brochures contain a comprehensive list of agencies and are distributed through international agencies.

While these developments represent significant progress, there is a widely held view that there is a need for a more effective and integrated effort to market the Cork area. As emphasised in CASP, this needs to build upon a strong brand for Cork which will resonate with external actors and which conveys to entrepreneurs and key corporate decision-makers the benefits of doing business in Cork. Such an initiative should build on the work of the Cork Marketing Partnership, launched in 2007 which brings together a representative range of local government, business and tourism organisations, including the City and County Councils, Irish Hotel Federation, Cork Chamber, Port of Cork, Failte Ireland, Cork Business Association and Cork Airport. This initiative aims to create a co-ordinated marketing model designed to develop Cork as the premier economic, commercial and visitor destination in the south of Ireland.

The proposed marketing of CASP is consistent with the strategic focus of the Cork Marketing Partnership which is in three areas; economic marketing, business tourism and promotions and projects. The marketing should take account of the background research completed as part of this Update, which included analysis and forward mapping of the kinds of economic activities that will lead to growth in Cork, as well as the work completed on the international benchmarking of Cork's competitiveness.

The CASP Updated Strategy recognises the steps forward which have been made in the preparation of the Economic Marketing Plan for Cork, by Cork Marketing Partnership. Collective support is needed from all CASP parties in implementing the marketing of Cork and in advocating the CASP region as a place in which to live and work.

5.3 Funding

The original CASP Strategy included a detailed outline of the public sector funding regime in Ireland and of potential funding sources for CASP projects. The main funding sources identified were the relevant programmes and measures under the National Development Plan (NDP) 2000-2006, and in particular the transport and sanitary services elements of the latter. The CASP also referred to an increased level of private sector interest in infrastructure investment and envisaged there to be "considerable potential" for a Public Private Partnership (PPP) approach to the delivery of CASP projects.

The overall public sector funding regime or framework remains more or less in line with that outlined in the original CASP Strategy. A key recent development was the formulation of the Government's latest National Development Plan *Transforming Ireland - A Better Quality of Life For All*, which covers the period 2007 to 2013. This Plan provides for a major commitment of public resources to capital investment over the Plan period and represents the key potential source of public funding for CASP projects.

In total, the NDP provides for total investment of €183.7 billion over the 2007 to 2013 period. This is broken down into a number of key investment areas of priorities as per the Table overleaf.

Table 5.1 - Key Investment Priorities identified within NDP 2007-2013

Area	€ billion Investment (current prices)
Economic Infrastructure	54.7
Enterprise, Science & Innovation	20.0
Human Capital	25.8
Social Infrastructure	33.6
Social Inclusion	49.6
Total	183.7

Source): National Development Plan 2007-2013 *Transforming Ireland*,

As identified in the CASP, the key areas of investment from a CASP perspective relate to areas such as transport and environmental services. The NDP 2007-2013 provides for a total investment of some €54.660 million under the Economic Infrastructure Priority of the Plan. The table below provides a breakdown of the main investment programmes under this priority.

Table 5.2 – Sub-Programme Commitments within Economic Infrastructure Priority

Programme	Sub-programme	2007-2013 Total € million (current prices)
Transport	Roads	17615
	Public Transport	12951
	Airports	1868
	Ports	481
	Total	32,914
Energy	Strategic Energy	1240
	Sustainable Energy	276
	State Energy Companies	7010
	Total	8,526
Environmental Services	Water Services	4,748
	Waste Management	753
	Climate Change	270
	Total	5,772
Communications & Broadband	Broadband	435
	Total	435
Government Infrastructure	Decentralisation	833
	Government Sites & Buildings	580
	Total	1,413
<i>Development Contributions</i>		2,100
<i>Unallocated Reserve</i>		3,500
Economic Infrastructure Priority Total		54,660

Source: National Development Plan 2007-2013 Transforming Ireland, Appendix 1

It is also important to highlight that the NDP sets out an overall strategy for the development of each of the designated National Spatial Strategy (NSS) Gateways including the Cork Gateway. Specifically, the NDP highlights the following key development and investment priorities for “Cork and its wider environs” over the period of the Plan.

Table 5.3 – Key Development Priorities for Cork Gateway identified in NDP 2007-2013

- Completion by 2010 of the M/N8 Dublin-Cork road to full motorway standard and other road and public transport aspects of Transport 21.
- The development, as part of the CASP Strategy of an integrated public transport system built along the Green Route programme of improved bus priority, the re-opening of the Cork City – Midleton rail services by 2008 and the development of commuter rail services on the Mallow-Midleton corridor.
- Introduction of hourly rail services on the Cork-Dublin route.
- Roads, water services, port relocation and associated infrastructure to facilitate docklands regeneration.
- Improved road and bus-based public transport links to Cork airport.
- Enhancement of road links to other Gateways along the Atlantic Road Corridor.
- Upgrading of N28 road access to Ringaskiddy Park and its associated industrial zone.
- Pedestrianisation and similar urban renewal activity, building on recent progress in this area.
- Enhancement of tourism, cultural and recreational facilities.
- Lands at Ringaskiddy and Carrigtwohill to be developed by IDA Ireland as part of its Strategic Sites Initiative.
- Continued development of the City’s R&D capacity such as the recently opened Tyndall Institute.

Source: National Development Plan 2007-2013 Transforming Ireland, p.69

In addition to the development priorities listed above other key development priorities include:

Critical Roads Infrastructure

- Eastern section of the North Ring Road as part of the Atlantic Corridor.
- Appropriate Interchanges.
- N20 Cork Limerick –this route should be given priority as part of the Atlantic Corridor development policy.
- N72 Mallow Fermoy including key links to the N20 Atlantic Corridor.
- Jack Lynch Tunnel and Dunkettle Interchange Upgrade
- N22 Macroom to Baile Bhuirne including Macroom Bypass
- N8 Cork Dublin Motorway to be complete by 2010.

The western link of the North Ring Road between the N20 and N22 is also important but it is acknowledged will take place on a longer timeframe and should follow delivery of the eastern section.

It is also suggested that consideration should be given by the NRA to developing for a future optimal layout at Dunkettle Interchange in order to address future capacity requirements.

Non-National Roads Infrastructure

The key elements of the non national roads infrastructure include:

- Local Road Network Accessibility Packages focussed on Rail Access Nodes.
- Docklands Roads and Bridges Infrastructure.
- Access to Little Island, Tivoli and Docklands.
- Midleton Northern Relief Road.
- Mallow Northern Relief Road (former N72 proposal).
- Carrigaline Relief Road
- R634 Cobh Access Road

Docklands Infrastructure

The key transport elements are:

- The Eastern Gateway bridge.
- Water Street bridge.
- Public transport bridge at Mill Road.
- Local roads infrastructure.
- The provision of a rapid transit link with the City Centre.

Further consideration should be given to public transport links to Tivoli and Little Island and onward to Mahon in light of the emerging spatial options which identifies them as major locations of growth for population and employment

The NDP provides for a very substantial commitment of investment in public infrastructure for the 2007-2013 period and represents the main source of funding for key CASP infrastructure projects. The NDP also indicates a strong commitment to addressing a number of key CASP investment priorities over the 2007 to 2013 period. In addition to the development priorities outlined above the N25-Sarsfield Road/Bandon Road should also be noted.

Ensuring sufficient funding to frontload the required infrastructure is a key challenge for CASP implementation and requires national and regional support.

5.4 Monitoring of Progress

In line with the original CASP Strategy, a mid-term review would be appropriate and it is suggested the most suitable time would be following the publication of the 2011 Census. An important and innovative feature of the CASP Strategy was the articulation of a detailed monitoring framework with the inclusion of a set of accompanying indicators. The intention was that these indicators would form an input to the ongoing process of monitoring the progress of the Strategy.

However, it would appear that the CASP indicator framework may not have functioned exactly as intended. Some of the indicators do not appear to have been utilised as an input to the ongoing CASP monitoring process. This reflects a number of difficulties evident across a number of the indicators. These difficulties include the following:

- ❑ Data for a number of the indicators has not proved readily available at CASP level; examples include the indicators relating to GDP (only available at NUTS III regional level), long-term unemployment and the proportion of population living within 1km of an open or green space;
- ❑ In the case of a number of the indicators, the definition of the indicator was somewhat ambiguous or unclear; an example includes the indicators relating to “Ratio of employment in centre to centre” and the indicators concerned with infrastructure;
- ❑ More broadly, the overall number of indicators included may have been excessive.

With a view to addressing these difficulties, a set of revised indicators is set out in the attached table. The proposed indicators have been selected, having regard to the principles or desirable indicator characteristics highlighted in CASP, including those of acceptability, availability, comparability and clarity.

As part of the CASP implementation there is a commitment to monitoring development in the Villages and Rural areas of the CASP ring, with a view to securing adherence to the broader CASP Strategy.

This Update of CASP is subject to a Strategic Environmental Assessment (as required by SEA Directive 2001/42/EC). The resulting Environmental Report recommends additional environmental policy objectives and monitoring indicators, in line with recent development in EU and national environmental legislation and policy.

Institutional Processes

The key mechanism which will be used to ensure the updated CASP strategy is delivered will be the alignment of the strategy with the County Development Plans for the two local authorities.

The City Development Plan and the County Development Plan are the key policy documents which will have a direct impact on the achievement of the updated CASP Balanced Spatial Development Goal and ensuring a concentrated rather than a dispersed population settlement. Ensuring an alignment between these plans and the updated CASP strategy is essential to effective implementation. This is also critical in ensuring that the spatial strategy provides the basis for public transport and other infrastructural investment. Once finalised the new County Development Plans and the subsequent City Development Plan needs to be vigorously implemented and where appropriate supported by supplementary development guidance. One issue of concern is that the revised population targets for the hinterland of the ring towns are already close to being achieved and the local authorities will need to address this issue because of its implications for growth elsewhere.

Table 5.4: Proposed Monitoring Framework

Goal	Policy Objective	Suggested Monitoring Indicator	
(1) Economic Growth Create a highlight competitive quality location so as to facilitate the growth of an innovative and advanced (but balanced and robust) economy.	01. To promote an innovative, advanced, high-value added and high wage economy.	<ul style="list-style-type: none"> ▢ Total employment in CASP area ▢ Employment by main sector ▢ Employment in IDA-supported companies in CASP area 	
	02. To retain a robust, well balanced economic structure.		
	03. To create an internationally oriented and high competitive location.		
	(2) Social Inclusion Promote social inclusion (especially within Metropolitan Cork) by improving access to public transport, education and jobs.	04. To create access to employment opportunities for the most disadvantaged members of the community.	<ul style="list-style-type: none"> ▢ Unemployment rates by main area ▢ Proportion of population with less than 2nd level education
		05. To improve access to facilities and services including education, health, community services and utilities.	
	(3) Environment* Enhance the environmental quality and landscape setting of the Cork sub-region, minimise impacts on ecologically sensitive areas and on built heritage and cultural landscapes.	06. To minimise impact on ecologically sensitive areas.	<ul style="list-style-type: none"> ▢ Number of Nature Conservation Areas ▢ No. of buildings listed ▢ No. of beaches with Blue Flag Status ▢ Hectares of land which have been re-zoned ▢ Share of municipal and industrial waste disposed via landfill ▢ Investigate feasibility of Co2 targets
		07. To minimise impact to cultural heritage, character, and setting of the City, towns and villages.	
		08. To improve the sustainable use of resources.	
		09. To minimise the effects on rural landscape character.	
		10. To ensure ready access to open space and natural landscape.	
		11. To implement the objectives and measures of the National Climate Change Strategy 2007-2012	
		12. To implement the objectives and measures of the Water Framework Directive (2000/60/EC).	
(4) Balanced spatial development Include the City, its satellites and rural settlement as part of a balanced settlement system with all levels of development in accordance with varying economic potential.		13. To deliver equivalent benefits to the entire area.	<ul style="list-style-type: none"> ▢ Population by area ▢ Number of households by area ▢ Number of Jobs by area ▢ Difference in unemployment rates between best and worst areas ▢ Distance taken to travel to work, school and college by area
	14. To locate appropriate economic activity in smaller settlements or centres.		
	15. To avoid excessive routine commuting.		
	16. To create a polycentric location pattern within Metropolitan Cork.		
(5) Urban Renewal Recognise City as the heart of the sub region... Promote a high level of economic activity in the City centre and ensure that the housing stock and urban services retain their attractiveness in general balance with the suburbs. Synthesise urban renewal with conservation of historic form and character.	17. To promote the City centre as the major area of comparison shopping, services and culture in the region	<ul style="list-style-type: none"> ▢ New net retail floorspace in City Centre ▢ Office development in City Centre 	
	18. To promote regeneration of the run-down urban areas of the City		
	19. To provide high quality public transport to reinforce the role of the City centre		
(6) Transportation Maximise the use of fully accessible public transport by co-ordinating building form, use and density with high quality bus and train services as well as regulating cars and other traffic. Promote walking by improving the pedestrian environment.	20. To ensure the provision of a well functioning, integrated public transport system	<ul style="list-style-type: none"> ▢ Public transport share of means of travel to work, school and college ▢ Level of public transport investment ▢ Morning peak hour bus and rail patronage ▢ Time taken to travel to work, school or college by area ▢ No. and km length of new bus routes 	
	21. To ensure the provision of a defined standard of the public transport, at reasonable cost		
	22. To ensure the timely and cost effective delivery of the accelerated investment in infrastructure		
	23. To reduce car dependence		
(7) Infrastructure Minimise the cost of providing water, sewerage, electricity, gas and telecommunications services to the population.	24. To maximise the use of existing infrastructure	<ul style="list-style-type: none"> ▢ Proportion of projects completed on time ▢ Proportion of projects completed within budget. 	
	25. To minimise the cost of new service provision and operation		

Source: Indecon analysis. Note: * Environmental monitoring should be carried out in accordance with the CASP Strategic Environmental Assessment Report and in line with the recommendations of the Environmental Reports prepared for the SEAs of the Updated Cork County Development Plan and the Updated Cork City Development Plan.

Conclusions

With effective policy implementation, the updated economic strategy for CASP provides the basis for Cork to develop as a sustainable competitive knowledge intensive city economy region which will attract investment nationally and internationally. The region has many underlying strengths and with effective policies and a commitment to achieving the goals set, the future for the Cork area is promising. There is, however, a challenge for national and local stakeholders to ensure that the building blocks underlying the updated CASP strategy are implemented as a priority.

ANNEXES

Annex 1 Glossary and Definitions

Business Land: Any land zoned for the purposes of New Industrial, New Commercial, New Town Centre and New Special Usage under the Cork County development Plan (2003).

Dwelling: Set of rooms normally occupied by a household, dwellings may also include vacancies.

Household: Group of people sharing a common budget.

Housing Completions: The number of new houses completed in any given period inclusive of units converted from non-residential to residential usage.

Housing Stock: The total number of housing units (or dwellings if otherwise stated).

Metropolitan Cork: Cork City, the satellite towns of Ballincollig, Blarney, Carrigaline, Douglas, Glanmire, Glounthaune, Carrigwohill, Middleton and Cobh together with a number of smaller settlements located between these and the city.

Ring Towns: Taken to include the towns of Kinsale, Bandon, Macroom, Mallow, Fermoy and Youghal.

Satellite Towns: Ballincollig, Carrigaline, Middleton and Blarney

Study Area: The CASP covers the areas of Cork City and its immediate area of influence which radiates out from the city to include the Ring towns of Kinsale, Bandon, Macroom, Mallow, Fermoy, Youghal and the towns closer to the city including Cobh, Passage West, Middleton, Blarney, Ballincollig and Carrigaline.

Net Density: The number of housing units which are exclusive of allowances for additional facilities roads, leisure areas and social facilities.

Annex 2 List of Submissions Made prior to Draft

List of written Submissions received Prior to Draft Publication

Submitted by	On behalf of
Little Island Safety and Access Group (LISA)	Little Island Community Association
Louise Oppermann, Community Timebank Business Network	Owners/Occupiers of Euro Business Park
Louise Oppermann, Community Timebank Business Network	Glounthaune Community Association
Cunnane Stratton Reynolds	Castlelands Construction Ltd.
Cunnane Stratton Reynolds	Lynwyn Developments Ltd.
Cunnane Stratton Reynolds	FSC Property
Cunnane Stratton Reynolds	Rossdale Enterprises Ltd.
Cunnane Stratton Reynolds	Fota Retail and Business Park
Cunnane Stratton Reynolds	Howard Holdings Ltd.
Cunnane Stratton Reynolds	Tesco Ireland Ltd.
Tom Phillips & Associates	Seamus Geaney, Ibis Hotel, Dunkettle
Tom Phillips & Associates	Templeford Ltd, owners of Marina Commercial Park.
Cunnane Stratton Reynolds	Rostellan Development Group
McCutcheon Mulcahy	Jerry Deane
M F Dineen & Co. Ltd.	Unnamed Developer
McCutcheon Mulcahy	Beamish & Crawford
John Spain Associates	Alvonway Investments Ltd., owner of Wilton Shopping Group
John Spain Associates	Greencore Developments Ltd.
Dennehy & Dennehy Designs Ltd.	Seamus Geaney
Dennehy & Dennehy Designs Ltd.	Ruden Homes
Dennehy & Dennehy Designs Ltd.	Ann Roper
Dennehy & Dennehy Designs Ltd.	Henry O'Brien
Dennehy & Dennehy Designs Ltd.	Robert/Gerard Forrest
Dennehy & Dennehy Designs Ltd.	John McCarthy
Dennehy & Dennehy Designs Ltd.	John Kingston
Dennehy & Dennehy Designs Ltd.	Eddie Barrett
Dennehy & Dennehy Designs Ltd.	Gretta Cronin
Dennehy & Dennehy Designs Ltd.	Maurice & John Walsh
Dennehy & Dennehy Designs Ltd.	Bill Mahony
Dennehy & Dennehy Designs Ltd.	Gerard Corkery
Dennehy & Dennehy Designs Ltd.	Mary Ryan
Dennehy & Dennehy Designs Ltd.	Patrick & Martin O'Connell
Dennehy & Dennehy Designs Ltd.	Patrick McCarthy
Dennehy & Dennehy Designs Ltd.	Michael O'Mahony
Dennehy & Dennehy Designs Ltd.	Whitebon Developments
Dennehy & Dennehy Designs Ltd.	Patsy O'Mahony
Dennehy & Dennehy Designs Ltd.	D & J Builders (Cork) Ltd.

Dennehy & Dennehy Designs Ltd.	D & J Builders (Cork) Ltd.
Dennehy & Dennehy Designs Ltd.	D & J Builders (Cork) Ltd.
Dennehy & Dennehy Designs Ltd.	Tony Horgan
Dennehy & Dennehy Designs Ltd.	John & Mary Burke
Dennehy & Dennehy Designs Ltd.	John Horgan
McCutcheon Mulcahy	O'Flynn Construction
DMA Ltd.	Rossdale Enterprises Ltd.
	Cork Airport
	Port of Cork Company
	Castlelands Construction Ltd.
	Niall O'Dowling
	Michael Kearney
	Cork Social Housing Forum
Margaret O'Neill	VM Development Co.
RKD Architects	Murnane O'Shea Ltd.
McCutcheon Mulcahy	Crystal Partners
McCutcheon Mulcahy	Moloney Family
McCutcheon Mulcahy	D&J Builders (Cork) Ltd.
McCutcheon Mulcahy	D&J Builders (Cork) Ltd.
McCutcheon Mulcahy	D&J Builders (Cork) Ltd.
McCutcheon Mulcahy	Murnane O'Shea Ltd. and Manor Park Homes
McCutcheon Mulcahy	Jim & Peter Horgan
McCutcheon Mulcahy	O'Flynn Construction
McCutcheon Mulcahy	Pat Murphy, Fox & Hounds
McCutcheon Mulcahy	O'Flynn Construction Co.
McCutcheon Mulcahy	John J. Fleming Construction Co.
McCutcheon Mulcahy	McCarthy Developments
McCutcheon Mulcahy	Lands at Carrigrohane
McCutcheon Mulcahy	Construction Industry Federation
McCutcheon Mulcahy	Fleming Developments Ltd.
McCutcheon Mulcahy	Mr. Bill Keary
McCutcheon Mulcahy	O'Flynn Construction Ltd.
McCutcheon Mulcahy	Dublin Airport Authority
McCutcheon Mulcahy	John J. Fleming Construction Co.
McCutcheon Mulcahy	O'Flynn Construction Ltd.
McCutcheon Mulcahy	Indaver Ireland
McCutcheon Mulcahy	Coleman Brothers Development/John Fleming Construction Co.
McCutcheon Mulcahy	John Fleming Construction Co.
McCutcheon Mulcahy	Blarney Castle Estate
McCutcheon Mulcahy	Ricky Walsh, The Walsh Group
Arup Consulting Engineers	Interested Parties in Bandon
Matrix Associates	Landowners in Airport Hill Area
Tiros Resources Ltd.	Ankra Developments Ltd.
Jim Power Economics	Aguila Properties Ltd. / Sisk
	Patrick J. O'Connor
	ANKRA Developments Ltd.
Tiros Resources Ltd.	
Platinum Asset Managers	DTZ Sherry FitzGerald
	Cork Chamber
	Cork Development Forum

Source: Indecon & RPS analysis

Annex 3 List of Submissions Made post Draft

Submitted by	On behalf of
Carrigaline Community Association	Carrigaline residents
Cork County Council	Mallow residents
McCutcheon Mulcahy Planning Consultants	Beamish & Crawford
Harbour Cat Ferries Ltd.	Harbour Cat Ferries Ltd.
Cork Development Forum	Cork Development Forum
Cork Chamber	Cork Chamber
Construction Industry Federation	Construction Industry Federation
Construction Industry Federation	Construction Industry Federation
Andy Cullen Assist. Secretary	Department of Transport
Cllr. Seamus McGrath	Passage West Town Council
John Spain Associates	Alvonway Investments Ltd.
Tara Spain, Snr. Policy Advisor	National Roads Authority (NRA)
Denis Healy, Manager Engineering Services	Port of Cork
Joseph O'Brien, Director	Construction Industry Federation (CIF)
Barrett & Cahill Property Consultants	Togher Community Association Ltd.
Dennehy & Dennehy Designs	Gerard Corkery
Dennehy & Dennehy Designs	O'Shea Farm at Scott's Farm, Curaheen, Model Farm Rd.
Dennehy & Dennehy Designs	Dennehy & Dennehy Designs
Dennehy & Dennehy Designs	Tony Horgan, Laherdane, Ballyvolane
Dennehy & Dennehy Designs	John Horgan, Kilmoney, Carrigaline
Dennehy & Dennehy Designs	Seamus Geaney, Waterrock, Middleton
Dennehy & Dennehy Designs	J & M Burke, Ballyhesta, Carrignavar, Blarney.
Dennehy & Dennehy Designs	D & J Builders Ltd. Lands at Arderrow, Ballyvolane.
Dennehy & Dennehy Designs	D & J Builders Ltd. Lands at Greenagh Co. Cork.
Dennehy & Dennehy Designs	Whitebon Developments Ltd. Blarney.
Dennehy & Dennehy Designs	Michael O'Mahony, Berrings, Co. Cork
Dennehy & Dennehy Designs	Patrick McCarthy, Banduff, Ballyvolane.
Dennehy & Dennehy Designs	P & M O'Donnell, Laherdane, Co. Cork.

Dennehy & Dennehy Designs	Mary Ryan, Monkstown, Co. Cork
Dennehy & Dennehy Designs	Bill Mahony, Walterstown, Cobh
Dennehy & Dennehy Designs	M & J Walsh, Watergrass Hill, Co. Cork
Dennehy & Dennehy Designs	Gretta Cronin, Dublin Pyke, Co. Cork
Dennehy & Dennehy Designs	Eddie Barrett, Caherlag, Co. Cork
Dennehy & Dennehy Designs	John Kingston, Rathmacullig West, Cork Airport
Dennehy & Dennehy Designs	John McCarthy, Kileens, Co. Cork
Dennehy & Dennehy Designs	Henry O'Brien, Ballyvolane
Dennehy & Dennehy Designs	D & J Builders, Tower, Blarney
Dennehy & Dennehy Designs	Ann Roper, Cloughphillip, Co. Cork
Dennehy & Dennehy Designs	Patsy O'Mahony, Kilmoney, Carrigaline
Midleton & Area Chamber	Midleton & Area Chamber
Matrix Associates, Urban Strategy & Development	Land owners in the Airport Hill area of Cork City
McCutcheon Mulcahy Planning Consultants	Pat Murhpy
McCutcheon Mulcahy Planning Consultants	O'Flynn Construction Ltd. Ballincollig.
Cork Environmental Forum	Cork Environmental Forum
McInerney Homes	McInerney Homes
FEASTA Foundation for the Economics of Sustainability	FEASTA Foundation for the Economics of Sustainability
Phoebe Enright	Vivid Logic Environmental Consulting
Cunnane, Stratton, Reynolds	Interested land owners in Ballyvolane.
Cunnane, Stratton, Reynolds	Tesco Irl. Ltd.
Cork Marketing Partnership	Cork Marketing Partnership
Construction Industry Federation	Construction Industry Federation
Cork Docklands Directorate, Cork City Council	Cork Docklands Directorate
Tom Philips and Associates	Robert and Gerard Forrest

Tom Philips and Associates	Templeford Limited
Tom Philips and Associates	O' Callaghan Properties
Tom Philips and Associates	Seamus Geaney
McCutcheon Mulcahy	Global Liquid Storage Ltd.
McCutcheon Mulcahy	O' Flynn Construction
McCutcheon Mulcahy	McCarthy Developments
McCutcheon Mulcahy	McCarthy Developments
McCutcheon Mulcahy	Tommy Maher
McCutcheon Mulcahy	Jim, Peter and Tony Horgan
McCutcheon Mulcahy	O' Flynn Construction
McCutcheon Mulcahy	Mr. Bill Keary
McCutcheon Mulcahy	Jerry Deane
McCutcheon Mulcahy	Mr. Ricky Walsh
Cunnane Stratton Reynolds	JJ Casey Project Management Ltd.
Cunnane Stratton Reynolds	Rostellan Development Group
Cunnane Stratton Reynolds	JJ Casey Project Management Ltd.
Cunnane Stratton Reynolds	Castlelands Construction Company
Cunnane Stratton Reynolds	FSC Property Ltd.
Cunnane Stratton Reynolds	Rossdale Ltd.
Cunnane Stratton Reynolds	Castlelands Construction Company
Cunnane Stratton Reynolds	SMCMC Ltd.
RKD Architects	Owners of Vernon Mount Property
Youghal Chamber of Tourism & Commerce	Youghal Chamber of Tourism & Commerce
Great Island Inshore Fisherman's Association	Great Island Inshore Fisherman's Association
Pat Walsh	Pat Walsh
Cork Marketing Partnership	Cork Marketing Partnership
Cork City Council	Cork Docklands Directorate

Source: Indecon & RPS analysis

Annex 4 CASP Infrastructure Capital Investment Expenditure

Measure	Cost (€m ex VAT)	Tranche 2 (€m ex VAT)	Tranche 3 (€m ex VAT)	Funding Source	Funding Secure
Commuter Rail Project*	115	89.6	25.4	NDP	Yes
Kent Station Interchange Redevelopment****	38	38	-	TBA	No
Docklands Infrastructure**	439	239	200	Various	No
Eastern Gateway Bridge***	80	80	-	GIF	No
Port of Cork Relocation *** (ADM/DWB Ringaskiddy)	56	56	-	GIF	No
Midleton Northern Relief Road***	18	18	-	GIF	No
East Cork Watermain Extension***	8.5	8.5	-	GIF	No
Green Routes/ Traffic Management****	112.8	64.5	48.3	NDP/local authority	TBA
Local Area Integrated Transport Plans****	38	18.3	19.7	DOT/DoEHLG/local authority	No
Water Supply Schemes+	205	142	63	DoEHLG	No
Waste Water Treatment Facilities+	285	270	15	DoEHLG	No
Total (€m ex VAT)	1395.3	1021.9	371.4		

Sources: * Cork Suburban Rail Feasibility Study (2002)

** South Docks Local Area Plan (2007) – excludes Gateway Bridge and LRT costs

*** Cork Gateway Innovation Fund Proposal (2007)

+ Cork Strategic Water Study

**** CASP (2001)

Annex 5 CASP Infrastructure Priorities

CASP Transport Priorities 2008 - 2020

Work Element	Proposed Phasing	
	Tranche 2 2008-2013	Tranche 3 2014-2020
Key Transport Proposals		
Development of a central public transport interchange at Kent Station/Horgans Quay	√	
Integration of Public Transport services and non-car modes of travelling	√	√
Dedicated public transport corridors as part of the major orbital and radial routes on the approaches to the city	√	√
Integrated Local Transport Planning		
High quality rail commuter services	√	
Quality bus services in dedicated bus corridors	√	
Integrated ticketing, improved stations and bus facilities	√	√
High quality interchange facilities between road, rail and bus	√	√
Park and Ride strategies	√	√
High quality road access on national routes	√	√
An adequate and managed supply of car parking	√	√
Traffic management and car restraint in city centre areas	√	√
Local area transport plans including plans for rural areas	√	√
Commuter planning for large employers and large developments linked to public transport availability	√	√
Create conditions that will facilitate a change in peoples attitudes towards the use of public transport	√	√
Transport Strategy for Metropolitan Cork		
Ballincollig		
Quality bus corridor and green route to the city, possible upgrading to guided busway in the long term	√	
Park and Ride on Carrigrohane Road	√	
Relocation of road space in town to buses, cycles, and pedestrians when Relief Road opens and through traffic discouraged. Implementation of Parking Strategy.	√	

Work Element	Proposed Phasing	
	Tranche 2 2008-2013	Tranche 3 2014-2020
Local transport plan for town and its hinterland	√	
Carrigaline		
Quality bus corridor and green route to the city	√	
Park and Ride at Carrigaline in the longer term	□	√
Upgrading of the N28 route to city and ring road	√	
Implement Local transport plan for Carrigaline	√	
Construct Inner Western Relief Road	√	
Construct Outer Western Relief Road		√
Midleton		
Complete Midleton Northern Relief Road	√	√
Railway re opened, new railway station	√	
Feeder buses, walk and cycle lanes to station	√	
Improved and extended local road network to serve development areas	√	
Reduction of traffic and traffic impact in town centre	√	
Implement Local transport plan for town and hinterland	√	
Cobh		
Enhanced rail service	√	
New Park and Ride station at Ballynoe		√
Possible bus/ferry link to Ringaskiddy	□	√
Implement Local transport plan for town and its hinterland	√	
Transport schemes in Rural Areas and Towns		
Macroom		
N22 Macroom Bypass at CPO stage	√	
Frequent, high quality bus to Cork	√	
Town centre improvements post bypass	□	√
Implement Local transport plan for town and hinterland	√	

Work Element	Proposed Phasing	
	Tranche 2 2008-2013	Tranche 3 2014-2020
Mallow		
Upgrade Rail Service	√	
Rail based Park and Ride, possible relief road to north of town (N72 Mallow-Fermoy)	√	
Development of N20 Atlantic Corridor Bypass	√	√
Implement Local transport plan for town and hinterland	√	
Provision of Public Transport Interchange	√	
Provision of Inner Relief Road	√	
Bandon		
2 nd bridge to be studied	√	
Frequent, high quality bus to Cork	√	
Town centre traffic and environmental improvements	√	
Implement Local transport plan for town and hinterland	√	
Kinsale		
Frequent, high quality bus to Cork	√	
Reduction of traffic and traffic impact in town centre	√	
Implement Local transport plan for town and hinterland	√	
Provision of Northern and Western Relief Roads	√	√
Fermoy		
Frequent, high quality bus to Cork	√	
Town centre improvements post bypass	√	
Implement Local transport plan for town and hinterland	√	
Youghal		
Future rail link to Middleton	√	
Feeder buses to station	√	
Town centre improvements post bypass	√	

Work Element	Proposed Phasing	
	Tranche 2 2008-2013	Tranche 3 2014-2020
Implement Local transport plan for town and hinterland	√	
Future rail link to Middleton		√
Feeder buses to station		√
Green Routes		
High quality, high profile public transport corridors where the emphasis will be on	√	
Providing high quality bus services in dedicated road space. 9 green routes to include the	√	
existing bus routes, and corridors serving Park and Ride sites that will be developed at the	√	
Kinsale road roundabout, the Bandon road roundabout and in Carrigaline	√	
<u>Green routes network (Phase II - Improvements)</u>	√	
<u>Dismantled Railway</u> - Blackrock, Ballintemple, Mahon	√	
<u>South City Link</u> - Kinsale Road Park and Ride, City Buses only	√	
<u>Bishopstown</u> - Ballincollig, Bishopstown, Bandon, Macroom Services to West Cork and Kerry	√	
<u>Douglas Via South Douglas Road</u> - Grange, Donnybrook, Ballyphehane, Carrigaline, Monkstown	√	
<u>Douglas Via Main Douglas Road</u> - Donnybrook, Carrigaline, Monkstown, Passage West, Crosshaven, Ringaskiddy	√	
<u>Mayfield</u> - Mayfield, Ballyvolane, Glenthirn, Carrignavar, Glenville	√	
<u>Faranree/Blackpool</u> - Faranree, Blarney, Tower, Cloghroe, Mallow	√	
<u>Knocknaheeny/Gurranbraher</u> - Knocknaheeny, Gurranbraher, Holyhill	√	
<u>N22</u> - Ballincollig, Macroom	√	
<u>Kinsale Road/ South City Link</u> - Kinsale, Ballinhassig, Airport, Kinsale Road Roundabout	√	
Commuter Rail Services	√	
Re opening of the rail line to Carrigtwohill and Middleton	√	
Introduction of new services from Mallow and Blarney into Cork	√	
Upgrading of the rolling stock and the frequency on the Cobh rail service	√	
Kent Station will be redeveloped as a major partnership between Iarnrod Eireann, private developers and the city council	√	□
Increased frequency of service to meet commuter demand		

Work Element	Proposed Phasing	
	Tranche 2 2008-2013	Tranche 3 2014-2020
Waterbuses and Ferries		
Waterbuses will be encouraged as tourist or leisure oriented ventures, possible as part of the redevelopment of the docklands.		
The existing Passage West Ferry will continue to play an important role, bolstered by the Proposed Ballynoe Station on Great Island, providing easy access between the rail network and Passage West	√	
Park and Ride strategy		
The key identified P&R locations include:		
Dunkettle and East Cork (rail based)		
Blarney and N20 (rail based)	√	
Northern Ring Road	√	
N22 Carrigrohane Road		√
N22 Ballincollig post implementation of Green Route	√	
South West City Approaches to service non-city centre areas	√	
Carrigaline in the longer term		√
Cycling	√	
The proposed green routes network will be promoted as safe and accessible for cyclists	□	
Road Transport	√	√
Strategic Roads – NRA has proposals to upgrade all the radial routes into and out of Cork, also upgrading the South Ring Road		
Improvements to the N71 (Cork-Bandon) as set out in the Roads Needs Study, the improvement of the R586 and the upgrade of the N22 (Cork – Killarney)	√	√
N8 Dublin - Cork motorway		
Northern Ring Road (East) from N20 (Cork - Limerick) to the N8 (Cork - Dublin)	√	
Northern Ring Road (West) from N20 (Cork - Limerick) to the N22 (Cork - Tralee)	√	
South Ring Road Interchanges	√	
N25 East Cork improvements between Carrigtwohill and Midleton	□	√

Work Element	Proposed Phasing	
	Tranche 2 2008-2013	Tranche 3 2014-2020
A new road bridge across the River Lee is proposed to provide access to the Docks redevelopment as well as integrating with the North West Link	√	□
Traffic Management Parking and Car Restraint	√	√
Includes measures to volumes of traffic in the road network in the city centre and urban areas	√	
Port		
Redevelopment of Ringaskiddy, development of Curlane Bank	√	√
Docklands		
The Gateway Bridge		
Road Bridge at Water Street	√	√
Public Transport Bridge at Mill Road	□	□
Local Roads Infrastructure	□	□
The provision of a rapid transit link with the City Centre	√	□

Source: RPS analysis

CASP Water and Drainage 2008 - 2020

Work Element	Proposed Phasing	
	Tranche 2 2008-2013	Tranche 3 2014-2020
Youghal WSS		
Increase treatment plant capacity at Boola to achieve a capacity of 4.47 Ml/d.	√	
Dower to Youghal (with provision for E1-3))	√	
Regional Scheme (following from E1-2)		√
1.5Ml Reservoir at Boola WTP	√	
2.0Ml Water Tower at Sweetfields		√
Midleton WSS		
Increase Midleton abstraction and treatment capacity	√	√
4.5Ml reservoir at Broomfield	√	
4.5Ml reservoir at Broomfield		√
Glashaboy WSS - (Little Island, Carrigtwohill, Cobh, Glounthaune)		
Extending the Harbour & City Scheme to Carrigtwohill (Works ongoing and scheduled for completion in 2008)	√	
Trunk main from Little Island to the City Docklands (Works Tendered & due to commence in 2008)	√	
Supply to Riverstown Hill Reservoir	√	
Supply the North City environs		√
4.5Ml reservoir at Springhill Upper	√	
4.0Ml reservoir at Springhill Lower	√	
4.5Ml reservoir at Springhill Upper		√
4.0Ml reservoir at Springhill Lower		√
Increase capacity of Ballard Hill pumps (Work Complete)	√	
Reinforcement of main from Springhill upper serving Carrigtwohill rural		√

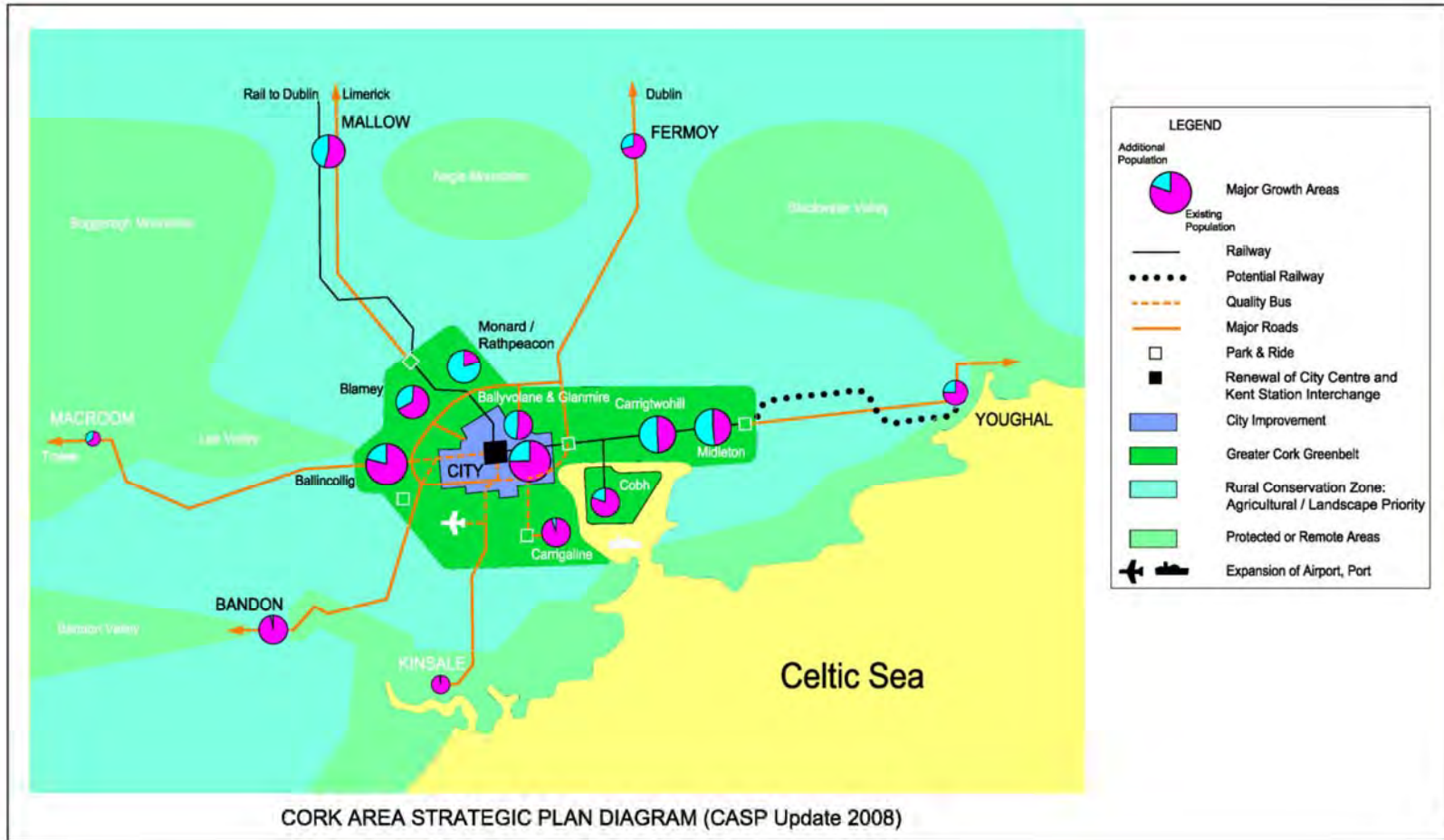
Work Element	Proposed Phasing	
	Tranche 2 2008-2013	Tranche 3 2014-2020
Innishannon WSS (Kinsale, Carrigaline)		
Upgrade raw water pumps at the intake to deliver 12.3 ML/d	√	
Prove and develop the Brinny aquifer, Supply Ballinrea and Monsktown Reservoirs from Carrs Hill reservoir, with further extension to Ballea	√	
Supply west of Bandon Estuary (20 km of main and 410 m3 storage)	√	
Supply to Belgooly (4.6 km of 150mm diameter main and 515 m3 reservoir)	√	
2.5 ML high level storage reservoir in Kinsale Town (Being advanced as SLI initiative)	√	
Rationalise Kinsale town distribution network (Currently in progress)	√	
2.25 ML balancing reservoir at Innishannon WTP	√	
200mm DI reinforcement of existing main to west of Bandon supply area take-off	√	
Bandon WSS		
Upgrade raw water pumps at the intake to deliver 6.4 ML/d	√	√
Regularise Abstraction to achieve a raw water intake of 7.15ML/d		√
Upgrade raw water pumps at the intake to deliver 7.15 ML/d		
Upgrade treatment plant to achieve a capacity of 7.15 ML/d		
1.25 ML storage reservoir on south side of Town with associated pumphouse and rising main		√
Strategic link from Innishannon WSS		√
Cork Harbour & City (Carrs Hill Section) (Carrigaline, Ringaskiddy)		
Supply from CH&C trunk to Passage West (1.25 ML reservoir)	√	
Complete Carrs Hill ring Main	√	
Transfer of areas from Mouth Emla High to Rochestown Tower	√	
350 mm Carrigaline south ring main	√	
150 mm rising main and 2.5 ML storage for Carrigaline South	√	
1.25 ML reservoir at Mount Emla High	√	
1.25 ML ground level reservoir at Goats Cross	√	
9.1 ML reservoir at Carrs Hill	√	
1.25 ML reservoir at Ballinrea		√

Work Element	Proposed Phasing	
	Tranche 2 2008-2013	Tranche 3 2014-2020
New pumps at Carrs Hill capable of delivering 69.35ML/d		√
Macroom WSS		
Construct new 3.8 ML/d Treatment Plant in Macroom		√
Cork City WSS (Lee Road)		
Upgrade Lee Road Plant to deliver 57.5ML/d (incl. 10 ML balancing storage)	√	
Upgrade Plant to deliver 80 ML/d		√
2.1 km of 600 mm diameter trunk main from Sarsfields Road to the Lee Road	√	
Replace pumps and rising mains to Shanakiel and Harbour View reservoirs	√	
Complete link from Churchfield reservoir to Shanakiel and Harbour View reservoirs	√	
Cork Harbour & City WSS (Ballincollig, Blarney, Cork City & Environs, Monard, Little Island, Carrigtwohill, Cobh, Midleton)		
Upgrade Plant to treat 90 ML/d (Lamellae)	√	
Upgrade Inniscarra WTP to treat 160 ML/d. (including additional 18.2 ML balancing storage)	√	□
Upgrade Inniscarra WTP to treat 200 ML/d	√	
Construct 12.5 ML Ballincollig Regional reservoir	√	
Transfer Bishopstown supply to Chetwynd and decommission Ardrostig branch	√	
Construct 12.5 ML Chetwynd high level reservoir	√	
Transfer Curraleigh supply south of the River Lee to Ballincollig regional reservoir	√	
Construct 28 ML Chetwynd low level reservoir	√	
Construct 0.5 ML reservoir at Kerry Road	√	
Construct 2.0 ML reservoir at Knockacorbally	√	
350 mm trunk main from Ballincollig to Aherla and development of Bride Valley scheme to Cloughduv, Crookstown, Kilmurray and Farran. (Development of local sources is proceeding as part of private developments which, if successful, may remove the necessity for trunk main supply from C & H scheme)	√	
Booster pumping and 250 mm trunk main from Inniscarra WTP to Dripsey and extension to Coachford (Scheduled to commence construction in 2008)	√	

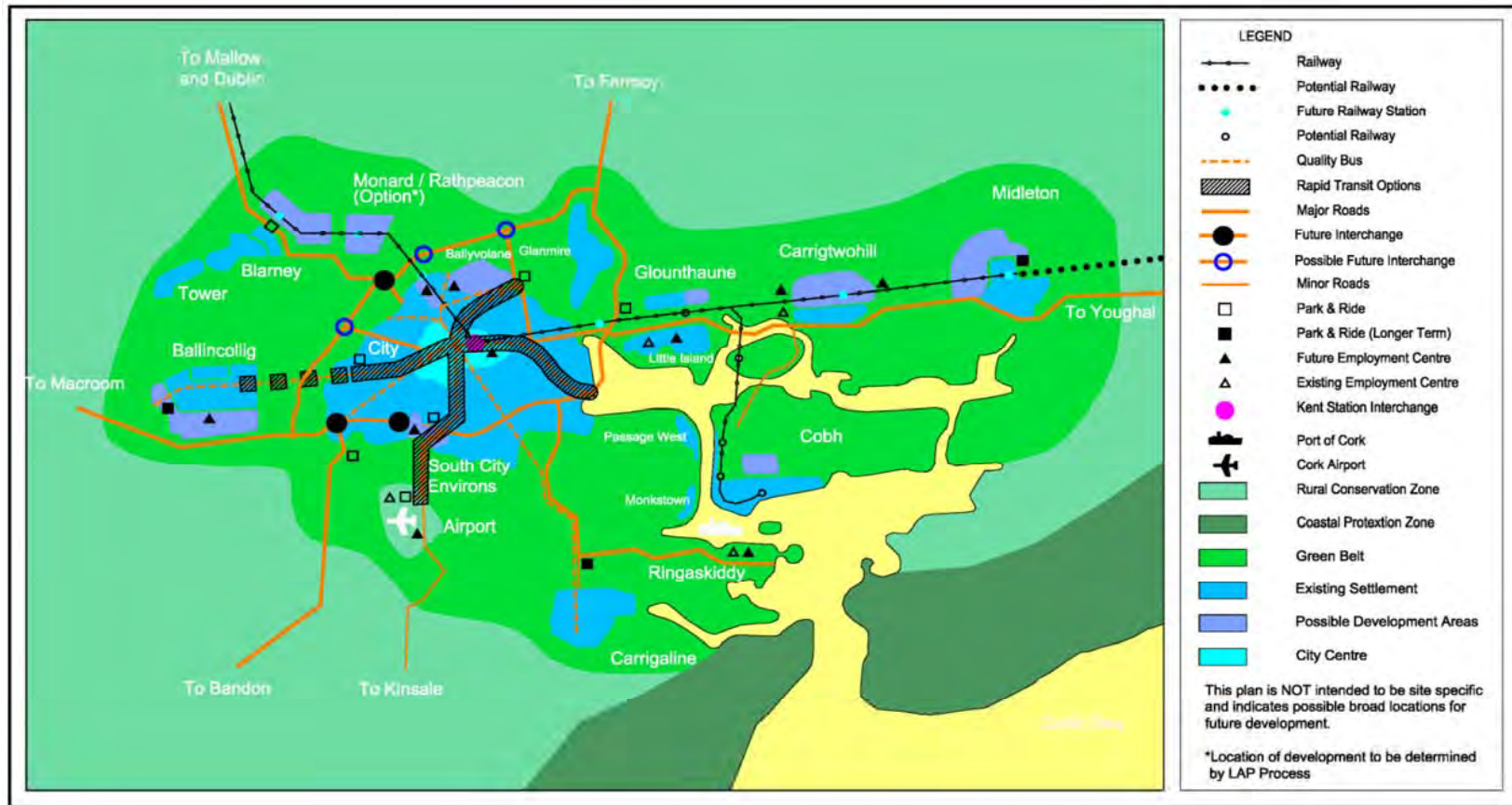
Work Element	Proposed Phasing	
	Tranche 2 2008-2013	Tranche 3 2014-2020
Booster pumping and 200 mm rising main from Monacnappa to Coolowen and 2.5 Ml reservoir	√	
900 mm north ring trunk main from Ballincollig to 10Ml reservoir at Monard and a 600 mm trunk connection to Tivoli.		√
300 mm branch from north ring main to Coolowen reservoir		√
600 mm link main from North Ring main to Churchfield reservoir		√
150 mm trunk main from Monard to Tivoli link to Banduff and Coole East		√
Booster pumping and 200 mm trunk main from Coolowen reservoir to Whitechurch	√	
Booster pumping and 150 mm trunk main from Coolowen reservoir to Grenagh	√	
Supply Monacnappa and Knockacorbally reservoirs from North ring main and provide 200 mm trunk main to Stuaque/Donoughmore		√
Fermoy WSS		
Assess current capacity of the Deerpark infiltration gallery	√	
Mallow WSS		
Upgrade Ballyellis WTP to 5.0 Ml/d capacity. (Scheduled to commence construction in 2008)	√	
3.5 ML storage reservoir at Ballyellis.	√	
Develop Box Cross well field and construct regional scheme to serve Mallow and northern hinterland.(Scheduled to commence construction in 2008)	√	

Source: RPS analysis

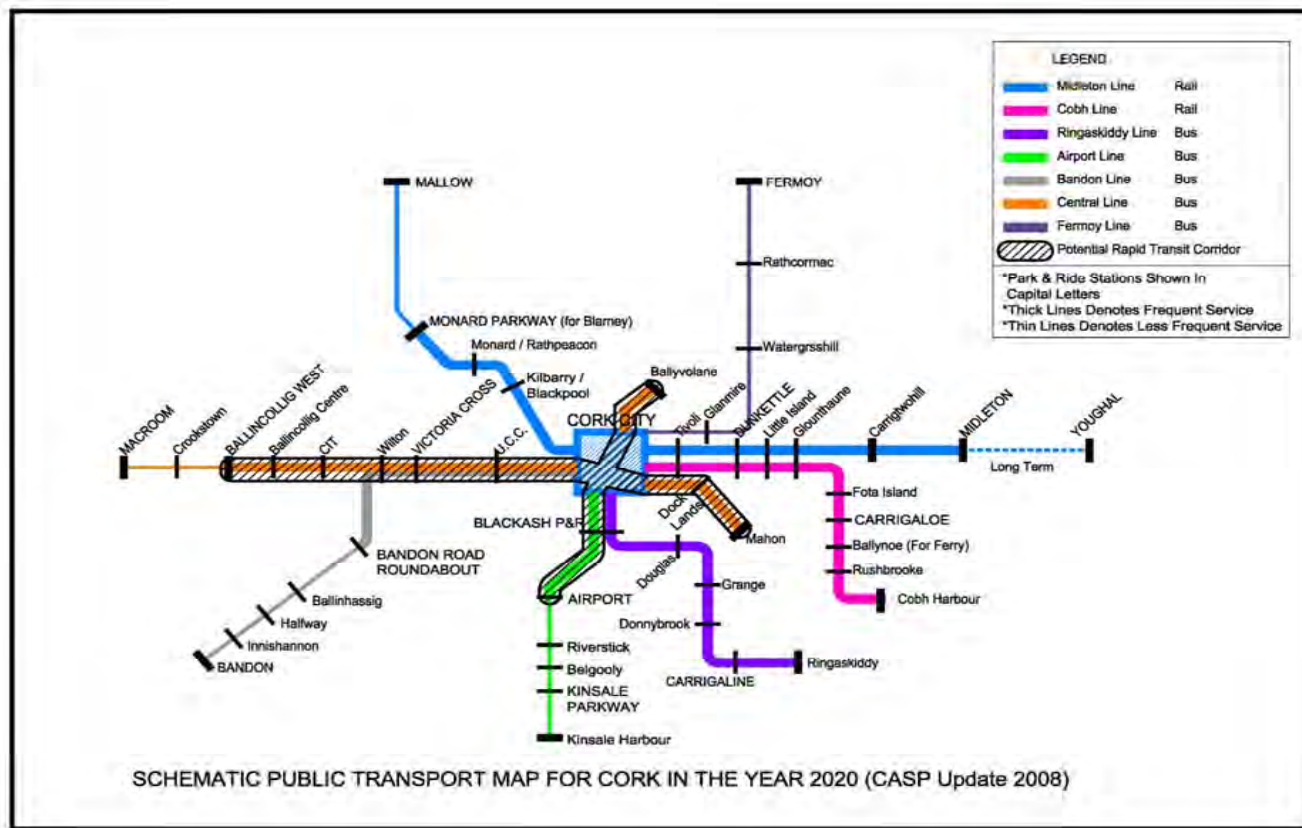
Annex 6 Larger Scale Maps



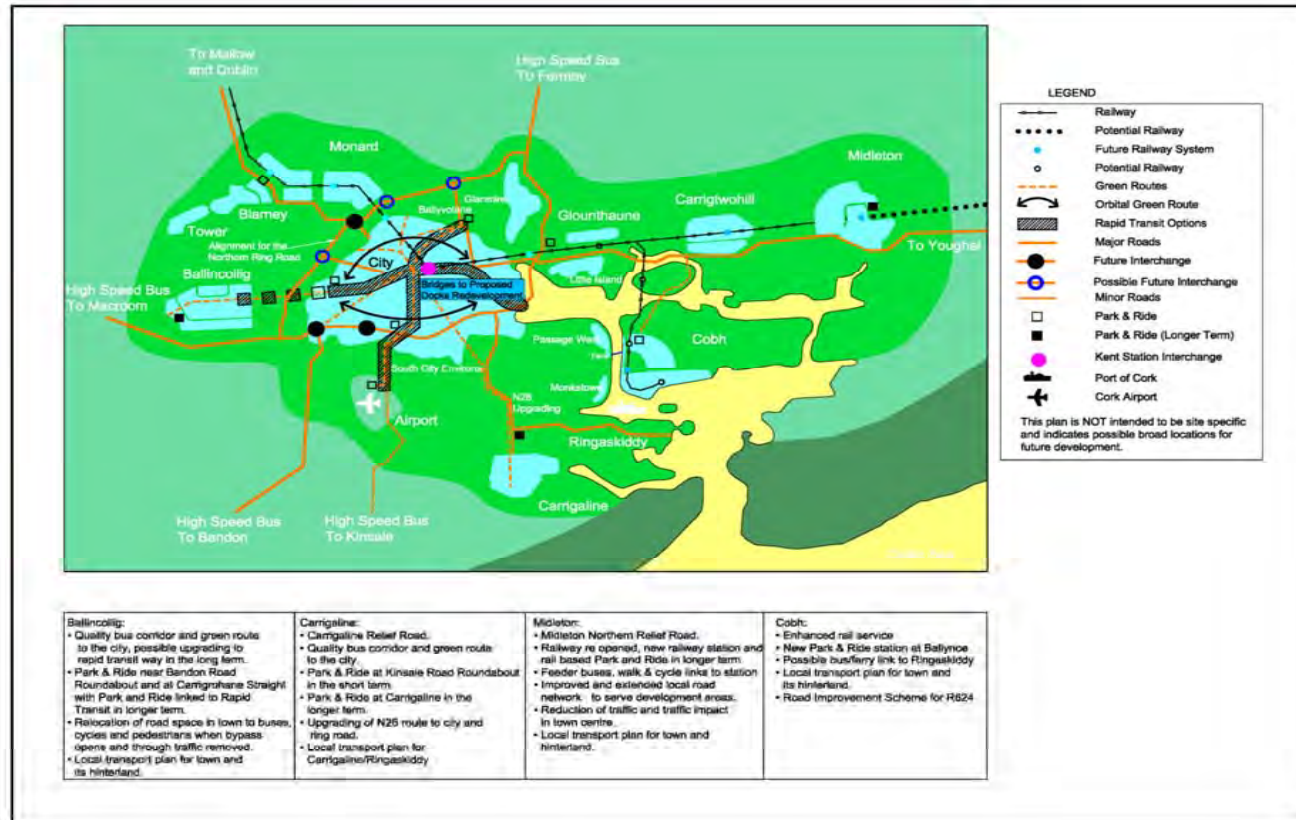
Structure Diagram for Metropolitan Cork (CASP Update 2008)



Public Transport Map for Cork in 2020



Transport Strategy for Metropolitan Cork (CASP Update 2008)



Transport Strategy for Ringtowns & Rural Areas (CASP Update 2008)

