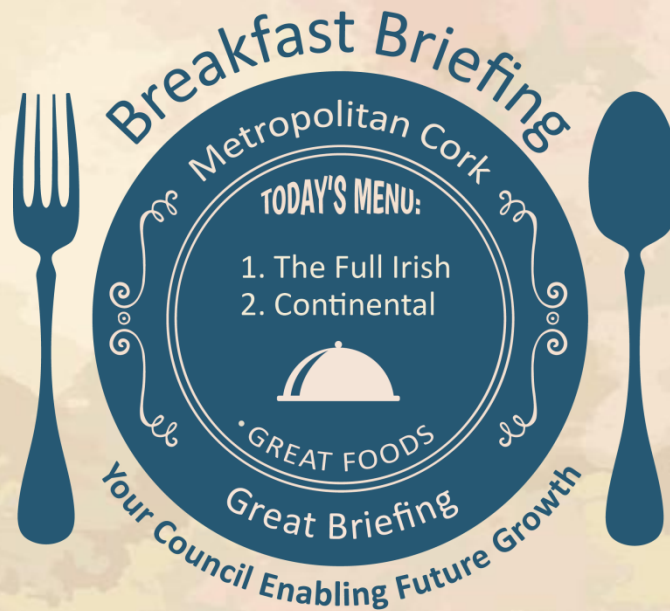


WELCOME

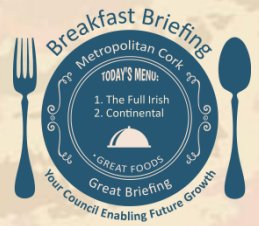
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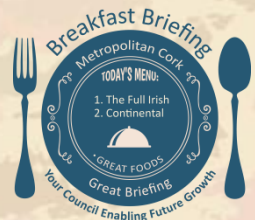
Series of Breakfast Briefings

- First of a series of Business and Community Breakfast Briefings.
- Information, Support, Stakeholder Messaging
- CCC critical role in facilitating conditions required for economic growth
- Your Council is aligned and activated, and you need to know what and how to influence it's direction



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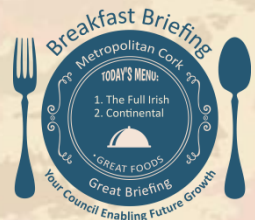
Structure and Focus

- Short review of feedback from business from 2015
- Broad overview of organisation, listing some key achievements to date, key infrastructure developments
- Putting Metro Cork into perspective.
- Housing supply and CCC activity aimed at maximising Govt. Support and conditions.
- National Planning Framework process and Cork inputs



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Business Perception Survey

- Overall positive perception of CCC – 72%
- 2 in 3 businesses were happy with how CCC handled their last query and it's outcome
- 89% of businesses had contact with CCC
- Top three areas for business enquiry ; Roads (21%), Planning (17%), Rates (13%).
- 72% were happy with the clarity of CCC decisions.
- 92% CCC residents believe that Cork is a great place to live.
- 86% feel a sense of pride in the area.
- 86% are happy with their employment and their work life balance
- 83% are satisfied/very satisfied with life in general



Broad Overview of Organisation



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Overview

c. 416,574 people served

Households (2016)

Cork 195k

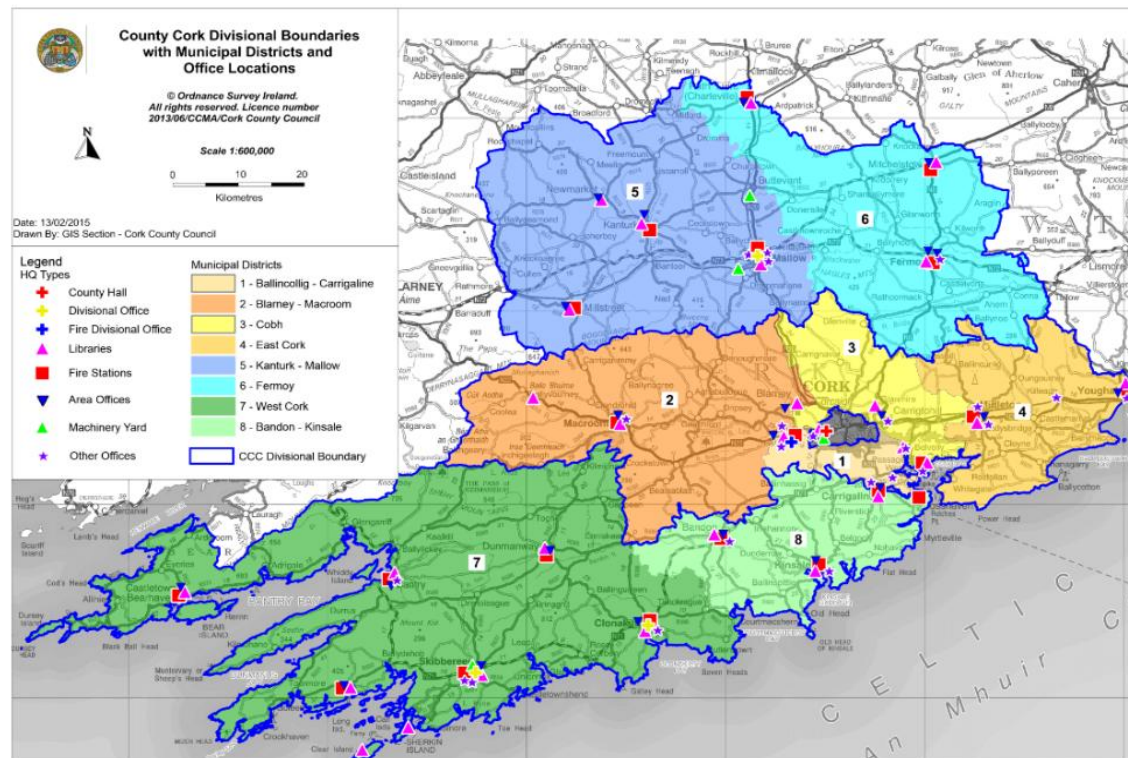
Cork City 49k

Cork County 146k

c. 7460 km²

3 Divisions

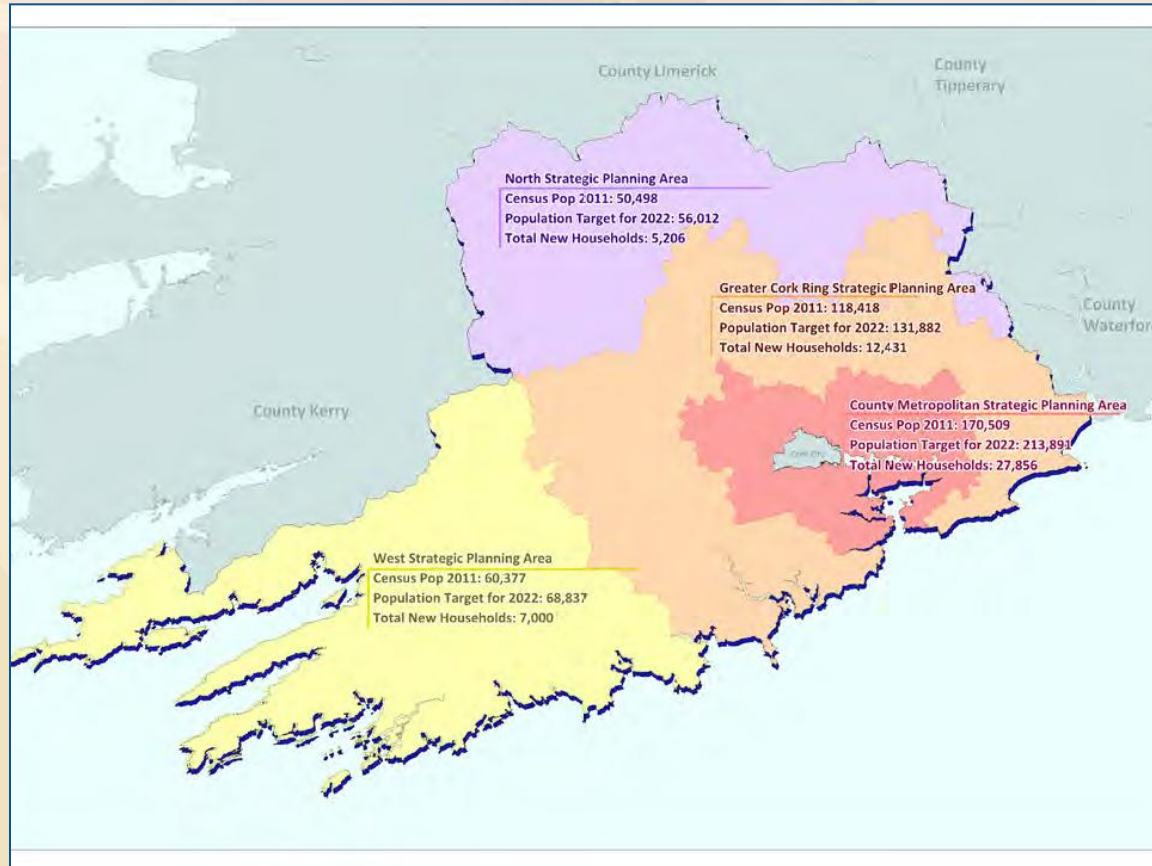
8 Municipal Districts



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Strategic Planning Areas



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5 Year commitment to Business

€33m Investment through :

- €6m Strategic Economic Development Fund.
- €5m Town Development Fund.
- €9m GMA – Community Supports.
- €2m Pay Parking reinvestment.
- €4m Town Improvements/Town Approaches.
- €2m Public Lighting Investment.
- €5m Footpath Investment Programme.



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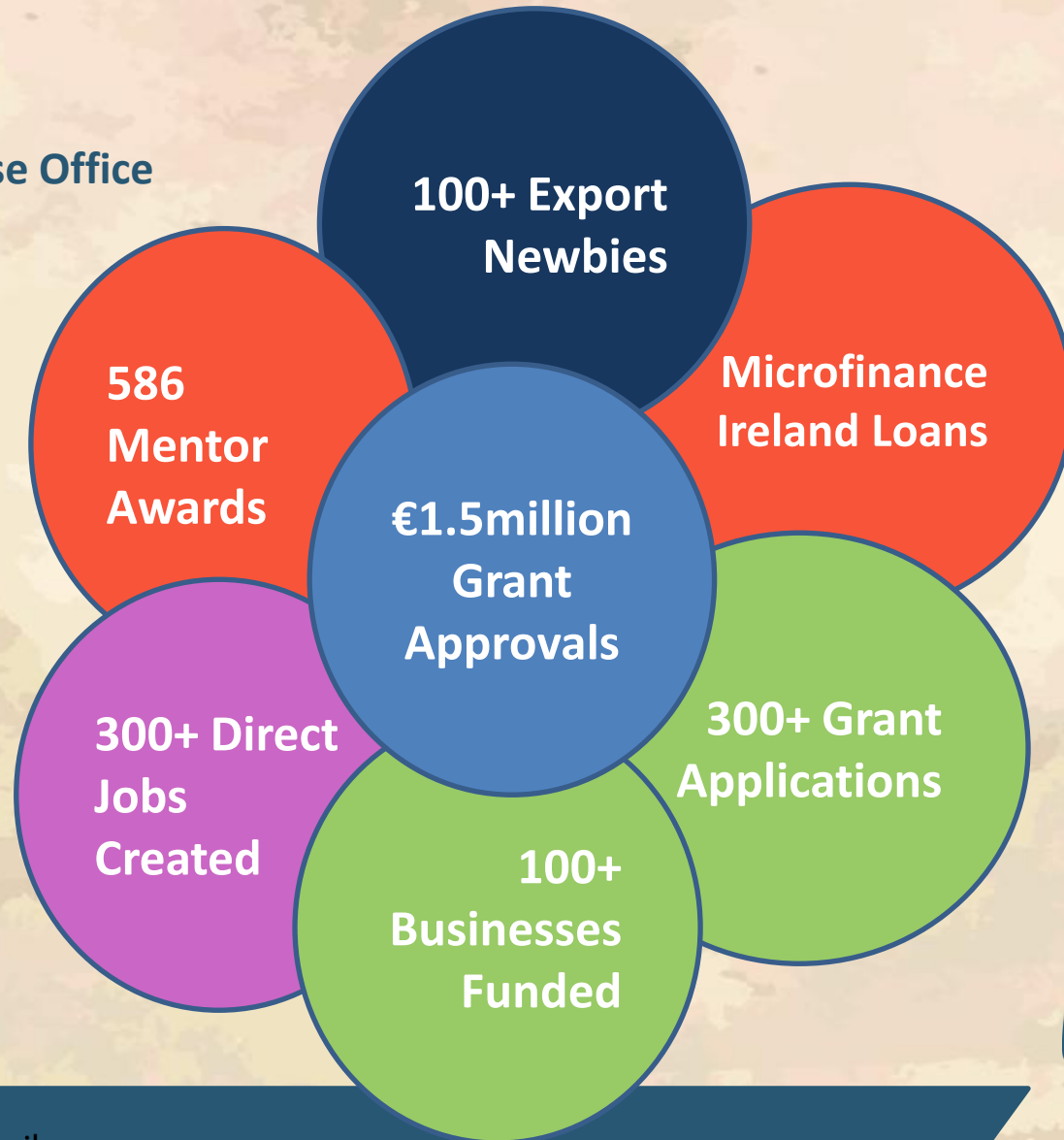
Certainty on Cost to Business

- Fix County “rate” at 74.75 until 2021
- Harmonisation 9 Town Councils over 5 years to 2020
- Rates Relief Scheme to operate over same period
- Relief will graduate from 5% to 1% over next 5 years.
- Rates cost to business are set with certainty to 2021
- 65% of businesses will benefit from a 5% rates relief in 2015



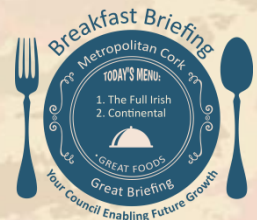
Small Business Supports

South Cork Local Enterprise Office



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Our Achievements

Social Housing Programme

- 2015 target of 392 units
- Achieved output of 469 units (20% Additional)
- 3 Year Programme of €80.6m in Govt. Action Plan
- Accelerated Programme of €130m being progressed to 2017/18
- Metro Cork Turnkey Schemes with House Builders- 272 Units
- Metro Cork CCC own design and build - 211 units
- Housing Estates:
- Unfinished reduced from 280 to 84
- 270 housing estates taken in charge 2014/15



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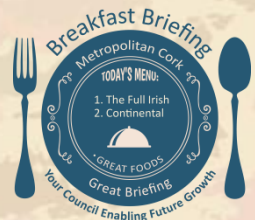
Achievements

- Local Authority Housing Department of the Year 2015
- 1st LA in country to achieve EMAP ISO50001 Energy Accreditation - 2016
- Water Quality Lab – secured INAB 17025 accreditation for first time – 2015
- Wastewater laboratory – accredited 25th year in succession
- Appointed as the Lead LA nationally for:
 - Waste Enforcement for Southern Region
 - Roads Management Office
 - Public Lighting for entire retrofit of network nationally
 - Treasury management services across the LA sector



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Achievements

- Roads support: CCC maintained funding at 85%

Year	Regional & Local Roads			National Rds.
	DTTAS Grant	CCC own resources	Total	NRA/TII Grant
2008	€64.99m	€17.30m	€82.3m	€85.31m
2016	€29.65m	€14.74m	€44.44m	€9.19m

Best Practice recommendations of DTTAS

	% Per Year	Actual % currently	No. Of Years currently
Road Strengthening	5%	1.83%	Once every 55
Surface Dressing	5%	2.54%	Once every 39



Major Works in Progress-Metro Cork

- Carrigaline Relief Road €14.26m
- Dunkettle Scheme €111m
- N28 €203m
- N22 €174m
- Little Island – Traffic Impact Assessment.
- Douglas LUTS
- Lower Harbour Scheme €97m
- Hawlbowlane €60m



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Protecting Business

- €36m – Mallow Flood Relief Scheme (Operating)
- €37.8m – Fermoy Flood Relief Scheme (Operating)
- €15.8m – Skibbereen Flood Relief Scheme (Construction)
- €11m – Bandon Flood Relief Scheme (Construction)
- EIS & Planning stage;
 - Lower Lee €62m,
 - Douglas €7.1m,
 - Glashaboy €7.6m.



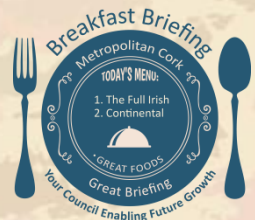
Major areas of co-operation between Cork City and County Councils

- Cork regional marketing
- Cork region tourism strategy
- N 40 maintenance
- Cork Harbour and City Water Supply
- Carrigrennan Wastewater Treatment Plant.
- Water supply transfers from County to City
- Lee Cframs flooding
- ICT Odyssey system for planning control
- SMART Gateway initiative
- Cork Convention Bureau
- Cork Joint Retail Strategy
- Cork Joint Housing Strategy
- Homeless Strategy
- Social Housing Task Force
- Libraries cooperation
- Veterinary shared service
- Laboratory services
- Major emergency management
- Cork Area Strategic Plan (CASP)
- Fire services – Section 85 agreement



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Metro Cork in Perspective



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Metro Cork in Perspective

- Gateway and Hubs 2009 NSS Population targets for 4 main Gateways outside of Dublin:

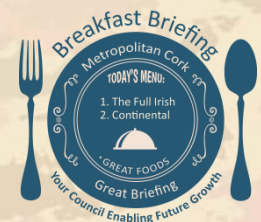
Gateway	2010 Target	2022 Target	Growth Target
Metro Cork (Incl. City)	296,600	381,500	32 %
Other Gateways:			
Limerick/Shannon	104,700	133,200	27%
Galway	78,400	98,500	26%
Waterford	52,500	62,500	19%
Other Gateways Total	235,300	294,200	25%

- Critical mass is the key to maximising future economic growth
- Concept of a cluster across the Gateways will not provide for the development of a second Metro region of European scale.
- Metro Cork can and should grow to 500,000 + with targeted growth beyond that historically achieved.

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Metro Cork in Perspective

- Cork economy most productive in the country
- Output per annum per employee: (Eurostat Sept. 2016)
 - Cork: €105,000
 - City of London: €104,000
 - Dublin: € 96,000
- FDI European Cities and regions of the Future 2016/17 rankings:
- Metro Cork (100k-350K pop – Small regions)
- Effectiveness of FDI Strategy - ranked 1st
- Economic Potential - Ranked 4th
- Limerick, Galway classed as Micro Cities



Housing Supply Activity and Support



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Housing Supply

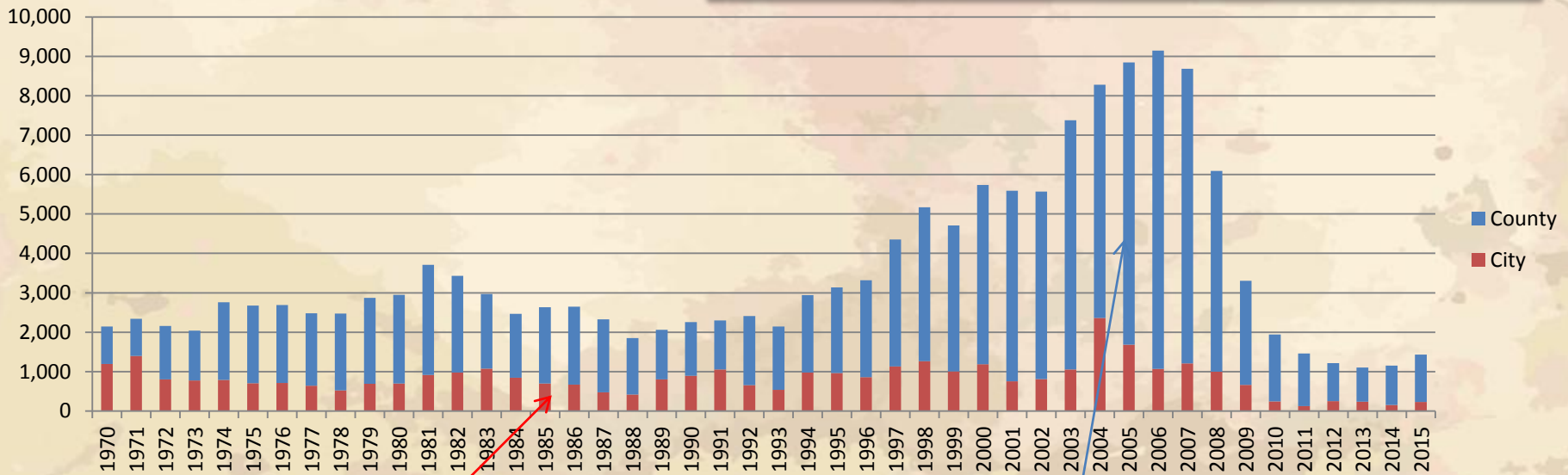
- In the last 30 years the County and City together built 118,532 housing units.
- In the next 30 years:
- How many houses will we need?
- What type of houses should they be?
- Where can they best be built?
- What infrastructure will we need to support them?



Housing Supply

- Annual Housing Completions
- Annual Averages:
- 1970 – 2015 = 3507pa
- 1995 – 2015 = 4647pa

- Housing output in the City has been relatively constant
- Housing output in the County has grown dramatically with the delivery of transport and other infrastructure



Cork City Annual Housing Completions:
1970 – 2015 = 830pa
1995 – 2015 = 870pa

Cork County Annual Housing Completions:
1970 – 2015 = 2677pa
1995 – 2015 = 3778pa



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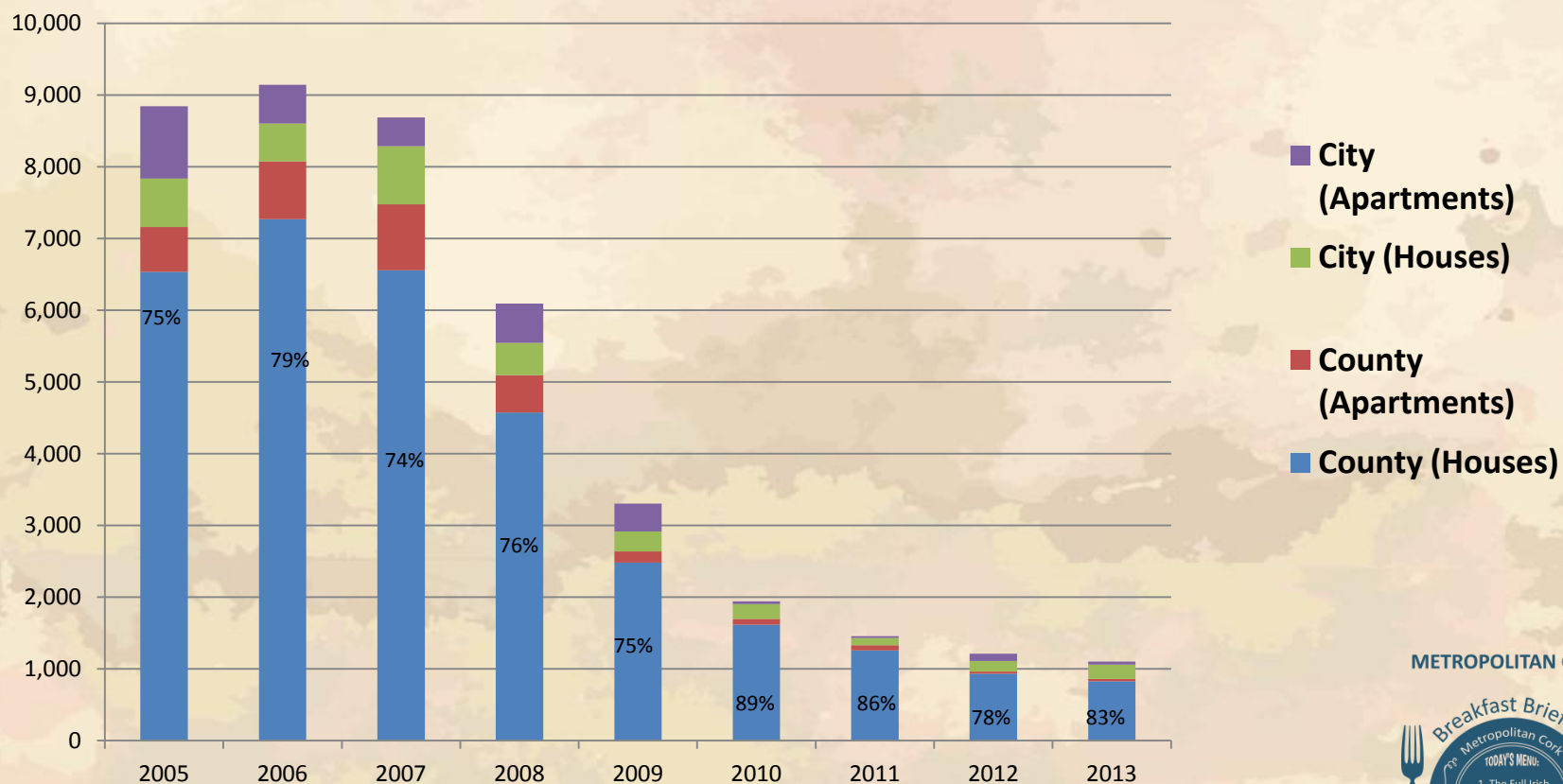
Housing Supply

- Annual Housing Completions (By Type)

Housing Type:

Cork City : 39% Apartments

Cork County: 7% Apartments



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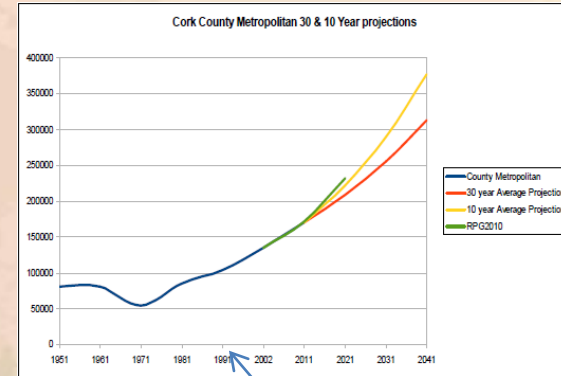
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Housing Supply

County Metropolitan Main Towns

	Units
Housing Requirement	Census 2011
	117,520
	Future Population Target
	160,141
	New Households
	24,478
	New Housing Required
	27,235
2011 LAP Land Supply (Inc. Land zoned in TC Plans)	Net Res. Area Zoned (Ha)
	1,241.94
	Total Units
	32,811
	Land with Infrastructure (In Place or Under Construction/Units)
	4,326
	Housing land Infrastructure Deficit (Units)
	22,909



Sufficient land zoned for only about **10/11 years** building at underlying rates with no 'headroom'

Land with infrastructure only sufficient for 1.5 years at normal building rates

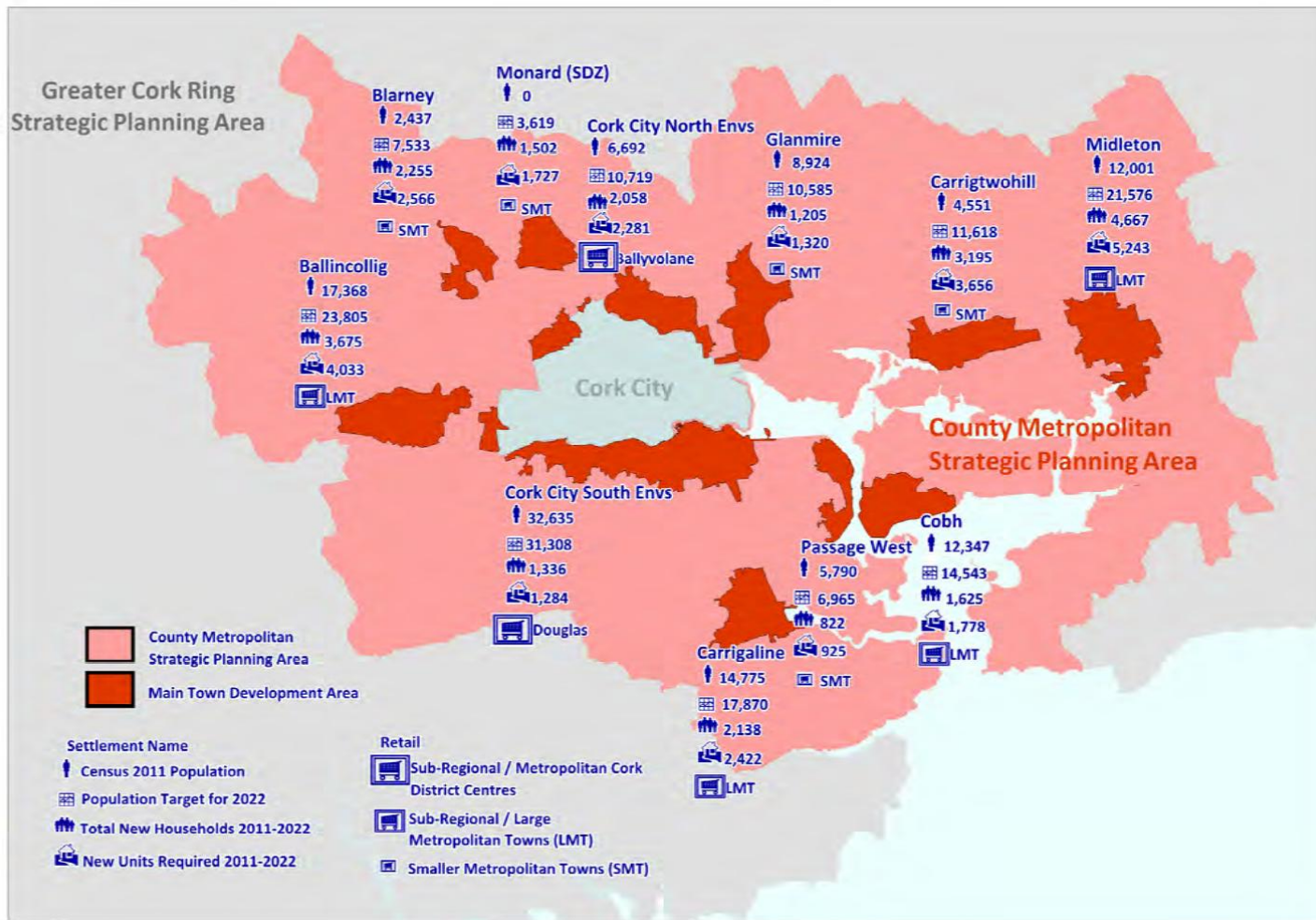
Strong population **growth** trend in County Metropolitan Area

Need to maintain strong serviced land supply



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Housing Activation Infrastructure Initiatives

- Local Infrastructure Housing Activation Fund (LIHAF)(DHPCLG)
- Metropolitan Area Special Infrastructure Fund (CCC/NTMA/ISIF) and potentially the HFA



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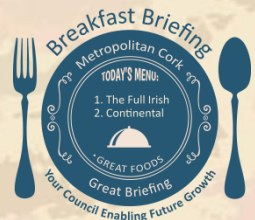
Local Infrastructure Housing Activation Fund

- DHPCLG Initiative (€200m)
- 75% grant - 25% loan
- Call for Proposals (from LA's) by 14th October 2016
- To enable early activation of suitable located and scaled housing sites - projects delivering in excess of 200 units.
- Currently zoned lands only
- Commitment from Housing Providers to produce housing quickly, at scale and at affordable prices
- Infrastructural blockages where funding not available from other sources
- Funding of infrastructure by housing providers uneconomic



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Understanding and identifying infrastructure investment required to stimulate development of residential housing units in Cork County to satisfy demand

INPUTS

County Metropolitan Planned Urban Expansions

Cork City together with the County Metropolitan Strategic Planning Area makes up the Cork 'Gateway'.

The Cork Area Strategic Plan (CASP) also emphasises the importance of the concept of Metropolitan Cork to ensure Cork's economic potential.

As a result, the primary focus of growth should be around the City and Metropolitan areas.

There are ten key areas that form part of Metropolitan Cork; Ballincollig, Ballyvolane, Blarney, Carrigaline, Carrigtwohill, Cobh, Glanmire, Middleton, Monard and Passage West.

Local Infrastructure for Community Housing Needs

All developable locations in Cork County were examined as part of preparation for the LIHAF proposal. LAPs and historical planning permission applications were examined as part of the analysis.

For the purposes of the LIHAF proposal, CCC in collaboration with PwC, analysed the €671m of infrastructure projects, in addition to €106m of projects related to Metropolitan Cork above.

The purpose of this analysis was to identify projects that could be undertaken in the short-term with an immediate effect on accelerating delivery and supply of residential housing in Cork County.

County Metropolitan

CCC developed a financial model around five of the ten key areas that make up the CMSPA. These areas are;

Ballincollig, Carrigaline, Carrigtwohill, Glanmire, Middleton.

Local Infrastructure

Having identified infrastructure deliverable in the short term, these projects were then assessed against four main criteria to identify infrastructure capable of being funded by LIHAF. The projects were assessed against:

- Delivery of greater than 200 units (per LIHAF).
- Economic return i.e. units delivered per €1m of infrastructure investment.
- Extent of market demand for the units.
- Complexities and developer readiness.

OUTPUTS

County Metropolitan Planned Urban Expansions

- **Ballincollig €28.5m**
- **Carrigaline €6m**
- **Carrigtwohill €37.2**
- **Glanmire €13.5m**
- **Middleton €25.9m**

Local Infrastructure for Community Housing Needs

High Demand Locations

- Carrigaline
- Cobh
- Crosshaven
- Middleton
- Garrandarragh
- Lehenagh
- Carrigaline Road, Douglas

Other Locations

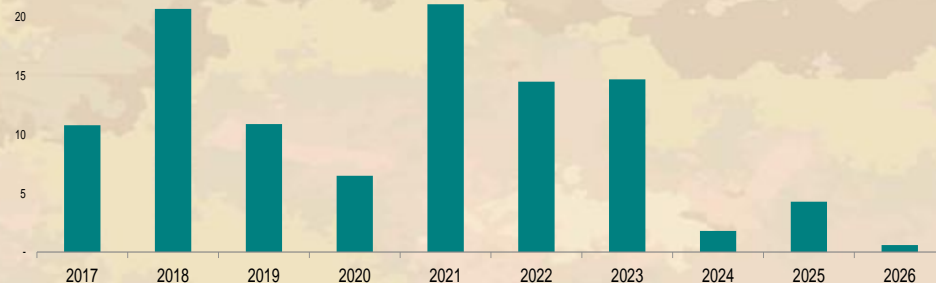
- Charleville
- Clonakilty
- Fermoy
- Mallow West
- Mallow North
- Mitchelstown North East
- Mitchelstown South East



Projected timing of infrastructural investment over a 10 year period from 2017 to 2026

Projected Investment Timeline (€m)

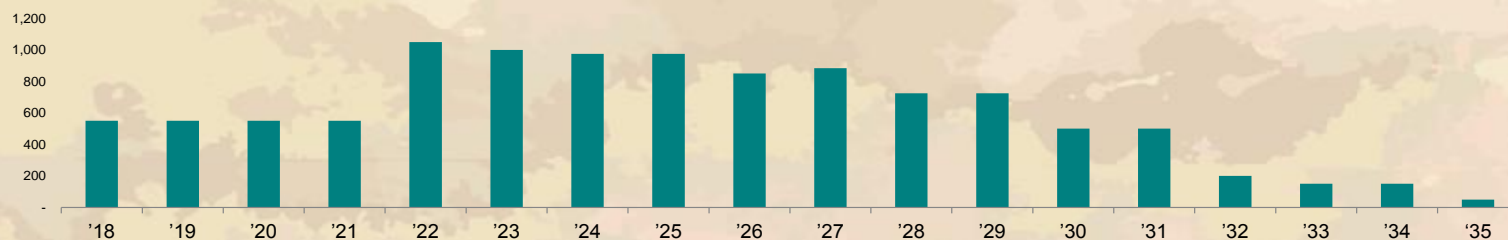
	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	Total
Ballincollig-1	3.5	4.1	1.0								8.6
Ballincollig-2					9.5	5.6	1.8		2.5	0.6	20.0
Carrigaline		0.6									0.6
Carrigtwohill-1	3.8	7.8	8.0								19.6
Carrigtwohill-2				6.5	6.5	2.3	2.3				17.6
Glanmire-1		5.2	0.7								5.9
Glanmire-2					0.55	6.55	0.55				7.7
Midleton-1	3.5	3.0	1.2								7.7
Midleton-2					4.5		10.0	1.8	1.8		18.1
Total	10.8	20.7	10.9	6.5	21.1	14.5	14.7	1.8	4.3	0.6	105.8



10,934 units housing units are estimated to be completed by 2035. Infrastructure investment of €42.4m from 2017 to 2019 will yield 1,100 units by 2019, and infrastructural blockages will have been relieved that will open up lands and deliver a further 4,284 housing units

Housing Units Completions (Moderate Pace of Development Assumed)

	'18	'19	'20	'21	'22	'23	'24	'25	'26	'27	'28	'29	'30	'31	'32	'33	'34	'35	Total
Ballincollig-1	125	125	125	125	125	125	125	125	125	125	125	125							1,500
Ballincollig-2					150	150	150	150	150	150	150	150	150	150	150	150	150	50	2,000
Carrigaline	100	100	100	100	100	100	100	100	100	100	100	100							1,200
Carrigtwohill-1	125	125	125	125	125	125	125	125	125	159									1,284
Carrigtwohill-2					125	125	125	125	125	125	125	125	125	125					1,250
Glanmire-1	75	75	75	75	75	25													400
Glanmire-2					75	75	75	75	75	75	75	75	75	75	50				800
Midleton-1	125	125	125	125	125	125	125	125											1,000
Midleton-2					150	150	150	150	150	150	150	150	150	150					1,500
Total	550	550	550	550	1,050	1,000	975	975	850	884	725	725	500	500	200	150	150	50	10,934



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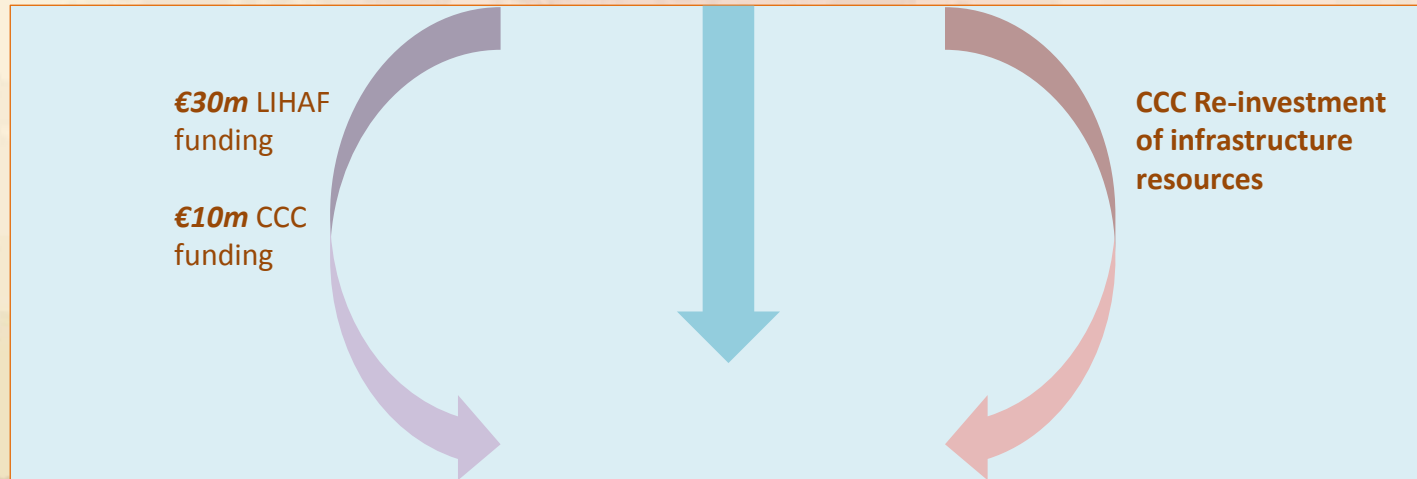


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Funding Housing Infrastructure

Supported by €40m ISIF loan facility



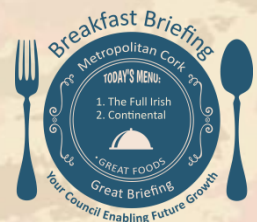
€106m infrastructure investment

10,934 housing units from 2018 to 2035



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Local Infrastructure for Community Housing Needs – CCC has conducted a comprehensive needs analysis across all CCC Local Area Plan zonings for infrastructure require to stimulate new housing development

- **Process of Analysis**



Estimate timing of infrastructure investment of €66m across 14 sites

‘High Demand’ Locations

Location	Infrastructure Item	2017	2018	2019	Total
Carrigaline	Carrigaline Western Relief Road / Minane Bridge L2495 upgrade	4.7	3.5		8.2
Carrigaline Road, Douglas	Carrigaline Road R855 improvement works	0.5	2.5		3
Cobh	Tay Road L2993 road re-alignment	0.5	5.0	4.5	10
Crosshaven	R612 & Church Bay Road L2500 road improvement works	0.5	2.5		3
Garrandarragh	Upgrading N71 to Dual Carriageway and construction of access roundabout	0.75	5.25		6
Lehenagh	Lehenagh More / Lehenagh Beg L2454 / L2455 road upgrade	1	4		5
Midleton	Lakeview Roundabout	0.5	1.5		2
		8	24	5	37

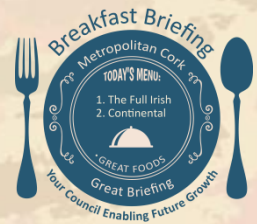
‘Other’ Locations

Location	Infrastructure Item	2017	2018	2019	Total
Clonakilty	Clogheen Road upgrade / SUDS Clonakilty South		1.5	7.5	9
Charleville	The Turrets L 1311 Road upgrade		0.5	4.5	5
Fermoy	L1513 Upgrade	1	2		3
Mallow North	N72 Ballyvinter Cross		0.5	3.0	3.5
Mallow West	N20 Annabella Roundabout upgrade / Kennel Hill L1203 upgrade	0.5	3.5		4
Mitchelstown N.E.	L1428 upgrade		0.4	1.6	2
Mitchelstown S.E.	L1418 / L96391 upgrades		0.5	1.5	2
		2	9	18	29

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LAP Key Dates

Key Stages	Date	Completed
Issue CEO Report on Preliminary Consultation Process to Members	15 th April 2016	✓
Brief Members and MD Meetings	April/May 2016	✓
Prepare Draft Local Area Plans	May – September 2016	✓
Brief Members on Draft Local Area Plans	September – October 2016	✓
Finalise Plans & Accompanying support documents	October 2016	✓
Publish Draft Local Area Plans	16th November 2016	
Issues CEO Report on Submissions received on the Draft LAPs to Members	February 2017	
Publish Amendments to Draft LAPs as appropriate	April 2017	
Issues CEO's Report on Submissions received on the Amendments to Members	June 2017	
Adopt Local Area Plans	July 2017	



Strategic Land Reserve

Adding to Housing Land Supply in Metropolitan Cork Principles:

- Est. building rate = 3000 units pa
- New LAP's need 12 years land - 36,000 units
- Main options to focus on inner Metropolitan Area, closest to City
- Options based on submissions received and research completed
- Evaluation based on transport, water, availability of services and environmental considerations
- Sites will be chosen during the LAP amendment stage and become strategic land reserve site requiring detailed framework plans
- Target to identify additional land for 5,000 units



“City Gateway Initiative”

New Concept for City Fringes in County LAP’s

Principles:

- Renewal or Enhancement of key ‘Gateway’ Areas + Sites
- Areas selected for potential to ‘frame’ the City & Metropolitan experience
- High Quality, landmark buildings.
- Mixed use
- Improved lighting, landscaping, pedestrian connectivity
- Welcome visitor and residents alike
- Possible locations:
 - Kinsale Rod, Bandon Road/Chetwynd, Blackpool, Ballyvolane
 - Welcome suggestion for other locations
- Northern Ring Road Proposed Interim Solution



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National Planning Framework



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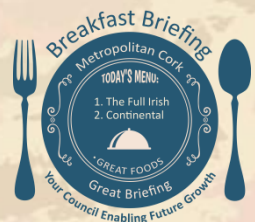
National Planning Framework

- Successor to outdated National Spatial Strategy being prepared: NPF – 20 yr horizon
- Concerned with economic and demographic growth and infrastructural investment requirements
- Recognise importance of Positioning Cork
- Will seek to influence NPF and inform the successor to CASP (CASP 2050) on a ‘whole of Cork’ basis



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Positioning Cork

A Joint Initiative

- Cork County & City Councils are progressing a Joint Submission to NPF
- Tender completed-International Team
- Finalising stakeholder engagement processes
- Delivery focussed evidence-based submission to maximise population/employment growth:
 - Interim advice 2028, 2034, 2040 & 2046
 - Focussed on 2050 Cork Vision



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A 2050 Vision of Cork

- Cork 2050 submission will include
 - Capacity analysis
 - Potential scenarios for growth
 - Costings of infrastructural requirements
 - Phasing proposals
- Shared Vision on a ‘Whole of Cork’ basis taking account of changing commuting patterns, technological changes & to maximise true potential – urban & rural
- Ambitious Project – Tight Timeframe - Q2 2017



Industrial & Commercial Development

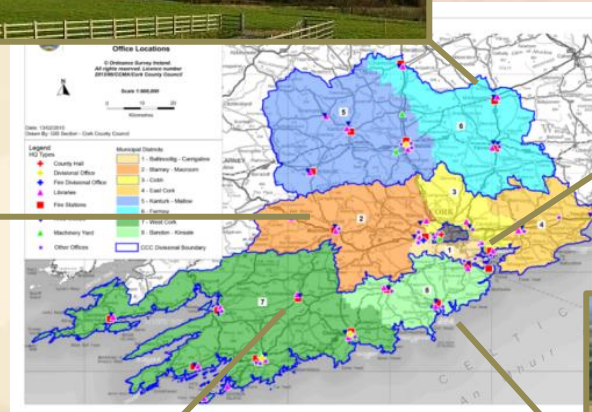
Dairygold - Plant Expansion



Danone Nutrica



Source: still.de



Pfizer



Source: i2e2.ie



Source: irishexaminer.ie

Carbery Foods

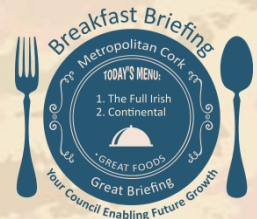


Eli Lilly - Plant Expansion

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Industrial & Commercial Development

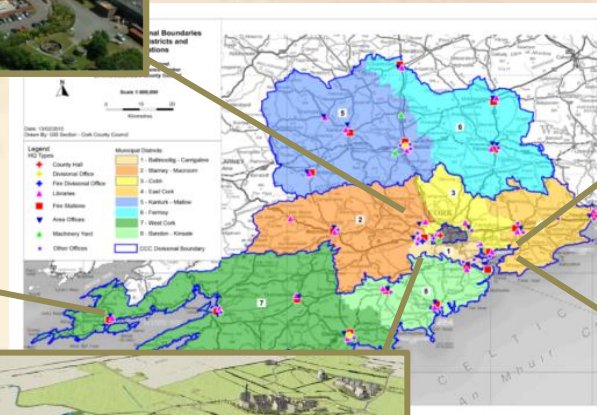
EMC



Castletownbere Fisheries



Cork Science & Innovation Park



Novartis Pharmaceutical

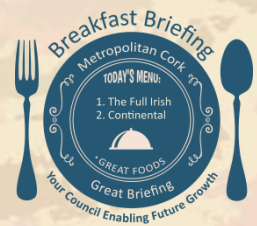


Glaxosmithkline



Cork
County Council
Comhairle Contae Chorcaí

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THANK YOU



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