3

Regional Profile

3. Regional Profile

3.1. Location

Located in the extreme south west of the country, adjacent to the designated "Gateway" of Cork city, the region is a diverse rural area of some 3,200 km². Comprised of a distinctive natural area of development, it includes the entire electoral areas of Bandon, Skibbereen, Bantry and parts of the Macroom electoral area. The West Cork region is bounded on its eastern periphery by the town of Carrigaline and Cork harbour, and by over 550km of highly indented coastline to the south. The boundaries of the region to the west and north are contiguous with those of the neighbouring Local Action Groups, South Kerry Partnership Ltd, Comhdháil Oileáin na hÉireann, IRD Duhallow Ltd, Meitheal Forbatha na Gaeltachta Teo, South East Cork Area Development and Blackwater Resource Development Ltd (see Appendix 4).

94 of the area's district electoral divisions (66% of the area total) comprise the CLÁR designated region within West Cork (see Appendix 4). With some minor exceptions, these district electoral divisions form an unbroken land mass west of the towns of Macroom and Clonakilty.

A series of maps outlining the aforementioned boundaries and designations as well as a listing of all the 143 constituent district electoral divisions is contained in Appendices 4 and 5 respectively in this document. Maps and diagrams which identify West Cork's position in relation to National, Regional and Local spatial designations are also included. Specifically these include the National Spatial Strategy (Including Gateways and Hubs), the Atlantic Gateway Corridor, Metropolitan Cork, the North and West Cork Strategic planning areas as well as the Cork Area Strategic Planning Area. The diagrams indicate four specific sub-regional designations for West Cork (Rural Areas Under Urban Pressure, Strengthening Rural Areas, Rural Diversification Areas and Main Town Green Belt) and place particular priority on the proposed Strategic Transport Improvement Corridor from the Strategic Employment Centre of Clonakilty to Cork city (N71) as well as the National Transport Corridor from Cork city to Tralee (N22) which traverses the northern periphery of the West Cork region.

3.2. Topography

Characterised by parallel ridges and river valleys, the topography of the region differs quite dramatically within comparatively short distances. The more fertile and productive lands can be found in the east. Further westward, uplands become broader and higher, in parts reaching an elevation in excess of 600m above sea level. Towards the Atlantic Ocean, the limestone valleys are shaped by the sea to form deep rias, like Bantry Bay, separated by the narrow mountainous Beara, Sheep's Head and Mizen peninsulas. The rivers which drain the fertile farmlands flow eastwards before turning abruptly southwards to reach the sea; Submergence of their lower valleys has produced long estuaries at the mouth of the Lee, Bandon, Argideen and Ilen rivers.

The terrain of the West Cork region has strongly influenced settlement patterns. Small towns and villages are vital economic and cultural hubs, profoundly influencing, as well as being influenced by their rural hinterlands. Within the region, the larger population centres such as Bandon, Macroom and Kinsale tend to be found within 30km commuting distance of Cork City. In recent years, the economic and social development of these towns has been inextricably linked with that of metropolitan Cork and while some towns have developed significantly as a function of the economic growth experienced in the last decade, the maintenance of their morphology, economic and environmental sustainability as well as their social fabric requires careful consideration and management. Further west, the principal urban structures and settlements generally tend to follow the indented coastline. The economic and social well-being of larger towns such as Clonakilty, Skibbereen, Bantry and Castletownbere is very much dependent on the extent to which they use their coastal and natural resource advantages in tourism, fishing, aquaculture, services and agriculture. In general terms, economic disadvantage in West Cork closely correlates with topography and access. In this context, large swathes of land to the west and north of Dunmanway, the upper Lee Valley as well as in the region's three peninsulas pose significant challenges in achieving future economic and social viability.

The quality and scope of the natural environment is West Cork's prime resource. The development potential of West Cork depends significantly on its topography, natural resources and attendant land use capability. The soil pattern of the region is diverse varying from a limited amount of arable, alluvial brown earth and brown podzolic types to much more frequent podzols, gleys, peats and skeletal soils. The land use capability of these soils also varies with the widest use range in the east offset by extremely limited land use in the mountainous areas to the west. Accordingly significant tracts of farmed land in the region are classed as most severely disadvantaged.

Fitzpatrick & Associates reporting in the NUTS 11 Development strategy prepared for the combined Regional Authorities describe the region:

> *"West Cork, (South Kerry and West Clare) may be regarded as the only remote and disadvantaged area of the region. They are peripheral and under-developed and exhibit many of the characteristics of other peripheral areas along the West Coast of Ireland. These include marginal soils, limited topography, large number of smallholdings, weak urban structure, relatively poor communication structures and continuing outmigration to national and international urban centres."*

Agriculture is the most important human activity affecting biodiversity and other aspects of environmental quality, having both positive and negative effects. 74% of the total land area in West Cork is used for agriculture as compared with 63% nationally. This indicates that the land in West Cork is relatively intensively used, which leads to pressures on the environment's natural restorative ability. The decoupling of farm subsidies since 2005 in the form of the Single Payment Scheme could lead to radical changes in land use. Some of these changes could be beneficial, though other changes may erode environmental capital affecting landscape character and biodiversity. For example, the removal of sheep from upland grazing areas could actually destabilise the prevailing ecosystem. In areas of ecological sensitivity with specific environmental needs (such as High Natural Value (HNV) farmland areas) the REPS scheme is particularly important to ensure improved practice and continuity of land management.

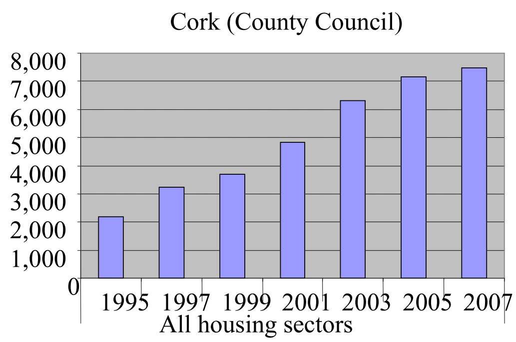
It is estimated that there are approximately 2,000 farmers participating in the REPS scheme in West Cork, covering about 27% of the agricultural land. Launched in November 2007 REPS 4 seeks to ensure that farmers deliver environmental benefits through a range of obligations, including nutrient management, grassland and soil management, protection and maintenance of watercourses, waterbodies and wells, retention and protection of wildlife habitats and features of archaeological and/or historical interest. Farmers are also obliged to undertake training in environmentally friendly farming practices. Under REPS 4 the average payment will be €7,220 per annum, a significant source of income and likely to bring more farmers into the scheme. A key point to note, however, is that the potential benefits arising from REPS only affect farms producing commodities where some support is provided through direct payments. Food and energy crops produced from farms without price supports, pigs, poultry and to an extent dairy are currently underrepresented in REPS and as things stand are unlikely to participate in REPS in the future. In addition to REPS, farmers with land on way-marked walking routes also qualify for supplementary payments in return for the development, enhancement and maintenance of approved walking routes.

The last decade has also seen considerable housing development in West Cork, both one-off and urban – the graph below shows the rapid increase in housing development in Cork County, as measured by completions (West Cork accounts for 43% of the county area). Increased urbanisation has not been matched in all cases with upgrades to the environmental infrastructure. According to the Draft County Development Plan 2007:

"Residential development has preceded the provision of waste water infrastructure in some areas or has resulted in cases where the capacity of existing treatment facilities has been exceeded and put under increasing pressure. In parts of County Cork there is a lack of appropriate waste water treatment infrastructure, where existing facilities are overstretched or where they do not treat waste water to a sufficient degree. Infrastructural difficulties in the County threatens water quality and is likely to be adversely affecting water bodies, particularly those which have been identified as being "at risk" or "probably at risk".

Pressure on the environment from population growth is particularly noted along main commuting routes from Clonakilty through Bandon and also in Kinsale and Bantry. It should be born in mind that further population growth is expected particularly in urban areas. Profiling this anticipated growth Cork County Council has forecast a shift from rural to urban from a current ratio of 78:22 to 50:50 by 2020. This shift has the potential to reduce pressures on the environment provided that the environmental infrastructure can be built to service the increased urban population.

Figure 3.1: Profile of housing development 1995-2007



Source: Cork County Development Plan 2007

The Draft County Development Plan 2007 states that "a large proportion of the water catchment areas in the County have been identified as being "at risk" or "probably at risk" of not meeting the objectives of the Water Framework Directive. The overall standard of water quality has improved since the baseline survey in 1995-97, though the number of high quality monitoring stations has declined. Based on a 2003 assessment, 4 river monitoring stations in West Cork had moderate pollution. There is no seriously polluted station in West Cork, though among the rivers most at risk of pollution from further development were the River Bandon and part of the Argideen and Lee rivers. There are 7 non-compliant lakes in the county all of which are in West Cork. There are no instances of non-compliance with regard to bathing water quality and the area has 7 Blue Flag beaches. With regard to groundwater, the main threats are agriculture and septic tank effluent, the areas most at risk include Skibbereen, Dunmanway and Macroom. The overall rate of compliance for drinking water in West Cork was below the national average, which was due to a lower rate of compliance across both public and private water supply schemes (Cork County Council, 2007). In addition to the gap in waste water treatment provision, development has been significantly affected in parts of West Cork due to water shortages – particularly in Bantry town, though work has since started on developing new supplies.

Forestry is an important feature of the landscape and an important environmental and economic resource for biodiversity, raw materials and energy. The area under forest cover represents 9% of West Cork's total land area, about 29,000 hectares. Just over half of this is in Coillte ownership and of the remaining 47%, slightly less than half is prime commercial forestry. Sitka spruce is the main commercial species accounting for 65% of the area planted. Broadleaf species account for 21% of commercial private forestry. This falls short of Ireland's target to increase native broadleaf forest cover 30% by the end of 2006, though it represents progress in this regard. The Forestry Environment Protection Scheme is similar in operation to REPS and is having an impact on new plantings. In addition to the normal afforestation premium, a FEPS premium of up to €200 per hectare for five years will be available to farmers in REPS who plant under the FEPS scheme. Aside from commercial forestry there are also old woodlands, which tend to occur along river valleys on old demesnes and a number of nature reserves, in particular Glengarriff and the Gearagh. These sites are particularly high in biodiversity and where proximate to one another can act have a network effect. Corridors and linking areas can support migration, dispersal and daily movements of wildlife.

From the perspective of land use, the landscape character and its visual appeal are particularly important assets to the tourism sector in West Cork and also underpin food marketing in terms of the areas clean image. The primary access routes are the N71, N22, R586 and R600 roads along which there are issues affecting visual appeal arising from litter. The problem of litter is even worse at litter blackspots along some minor roads due to fly tipping, though this is generally at secluded sites. The National Litter Pollution Monitoring System recorded a slight improvement in rural litter pollution nationally in 2006, though the situation remains bad. There is considerable commitment and activity on the part of local communities in West Cork to combat this problem and over 90 community groups participated in National Spring Clean in April 2008. The level of waste being diverted to recycling has increased hugely in the last five years with the introduction of 3 civic amenity sites in West Cork together with kerbside collection of dry recyclables. There remains, however, a large quantity of organic waste (brown waste) going to landfill which could be composted at home.

Brown waste is a particular problem for the food and tourism sectors which produce large volumes of food waste and various approaches to its management, including composting, are being explored. Any business with a turnover in excess of €1M that places in excess of 10 tonnes of packaging onto the Irish market is obliged to join Repak in order to discharge it's recycling obligations (self compliance by recovering packaging directly is an option but largely impracticable). Funds raised from Repak are used primarily to fund bring centres around the country. There are 51 bring sites in West Cork.

At a purely economic level representing the services of nature the value of biodiversity has been estimated at €2.6BN nationally. In providing an overview of biodiversity in the county the Draft Cork County Development Plan 2007 notes:

> *County Cork has a diversity of wildlife and natural heritage, which includes native wild plants and animals, natural habitats, geology and landscape. Much of the County's natural heritage is to be found on marginal lands, which are rich in biological diversity, and includes bogs, wet fields, rough grasslands, uplands, mudflats and saltmarshes. Marine waters, islands and the coastline of Cork County are also important areas for marine plants and animals. Coastal habitats include mud and sandflats and river estuaries, which support large numbers and a broad range of wintering wildfowl.*

The region is home to a number of unique habitats, notably Irelands only marine nature reserve, Lough Hyne; the only extensive alluvial woodland in Western Europe, the Gearagh and the sessile oak woodlands at Glengarriff, all of which possess considerable biodiversity, conservation, recreational and amenity value. The region's unique landscape and environment is also denoted by a number of Special Areas of Conservation. This designation is the primary means by which the EU Directive 92/42/EEC on the conservation of natural habitats and of wild flora and fauna is implemented. In West Cork the use of the designation is widespread and includes lands at Barleycove to Ballyrisode Point, Caha Mountains, Clonakilty Bay, Courtmacsherry Estuary, Glanmore Bog, Glengarriff Harbour and Woodland, Kilkerran lake, Lough Hyne, Roaringwater Bay, Sheeps Head, The Gearagh, Three Castle to Mizen Head, Cleanderry Wood, Myross Wood, Castletownshend, Derryclogher Bog, Bandon River, Dunbeacon Shingle, Reen Point Shingle, Farranamanagh Lough and Castlefreke Dunes, all of which are of strategic national and international importance as wildlife conservation areas and habitats. In addition to these locations, a number of raised bogs have been designated under national legislation as Natural Heritage Areas. These include bogs at Hungry Hill, Dereenatra, Trafask,, Conigar, Pulleen Harbour and Leahill. Other local sites have been proposed as Natural Heritage Areas but have yet to be statutorily proposed or designated. These predominate in western and coastal locations.

Lands designated as Special Areas of Conservation, Special Protection Areas or Natural Heritage Areas carry restrictions and limitations in terms of their use for farming, planning and development, amenity and recreation.

In addition to these locations, a significant number of local sites (52% of the total for Cork County) are designated under national legislation as proposed Natural Heritage Areas. These predominate in western and coastal locations. Lands with West Cork designated as Special Areas of Conservation, Special Protection Areas or Natural Heritage Areas carry restrictions and limitations in terms of their use for farming, planning and development, amenity and recreation with a view to protecting and encouraging greater biodiversity. There have been a number of initiatives to target particular species which may have a positive impact on biodiversity, such as the reintroduction of the sea eagle to neighbouring Kerry. More significantly very tight controls on fishing have been imposed to allow the recovery of certain fish stocks and prevent the other species becoming extinct, the wild Atlantic Salmon being particularly important in this context.

The West Cork area is blessed with a large stock of natural and built heritage in the region. However, there tends to be a lower quantity of listed buildings within the region. Throughout the countryside, there is a wealth of antiquities and archaeological monuments such as megalithic tombs, standing stones, dolmans, fulachtaí fia, hill forts, ecclesiastical enclosures, mottes and castles. With a coastline in excess of 550km, West Cork is also extremely rich in maritime archaeology. The area is also host to a diverse variety of buildings and structures of historical, architectural and archaeological importance such as the Fastnet Lighthouse.

The REPS scheme has an important role to play not just in regard to wildlife habitats but also in encouraging the conservation of rare breeds. There are, however, quite a number of plant and animal species within West Cork that remain at risk. The total numbers of endangered, vulnerable or rare species in Ireland are 172 flowering plants, 8 algae, 1 amphibian, 6 fish, 11 birds and 1 mammal. At a policy level the National Biodiversity Plan sets a framework for action at all levels of government, particularly local and also non-governmental agencies and groups.

Even taking account of the issues noted above, the overall picture remains positive and the natural environment in West Cork is a superb resource for a range of activities which benefit from environmental quality, including:

- Agriculture
- Aquaculture
- Fishing
- Angling

- Outdoor activity based tourism, including walking and watersports
- Food production and marketing
- Outdoor education

3.3. Climate & Climate Change

The dominant influence on the local climate is the Atlantic Ocean. The influences of the prevailing south westerly winds and the warming effects of the gulfstream result in a comparatively mild climate. In winter, mean temperatures in the region range from 2.5 to 4.5 degrees celsius. In summer, the mean temperature is in the range 16.0 to 18.5 degrees celsius with an annual mean of approximately 13 degrees celsius. This demonstrates that many parts of the region enjoy an extensive frost-free period allowing agricultural activity to be conducted over a relatively large part of the year. In coastal areas, air temperatures fall below freezing on only about 10 nights per annum during a typical winter. Source: Met Éireann (2008).

With southwesterly winds from the Atlantic dominating, annual distribution of rainfall follows a west to east gradient within the region highlighting the correlation that exists between relief and precipitation. Extensive parts of the mountainous west receive over 1600mm annually (and up to 2000mm in extremes) compared to around 1000mm in the eastern part of the territory. This difference largely relates to differences in duration rather than intensity of rainfall, however the average number of wet days in the mountainous west can reach up to 225 days annually. Source: Met Éireann (2008).

In terms of the average annual mean duration of bright sunshine most locations enjoy between a mean annual average of 3.75 and 4.00 hours of sunshine daily. Source: Met Éireann (2008). The sunniest months tend to be May and June with sunshine duration averages of between 5 and 6.5 hours daily.

The prevailing winds travel from the southwest although relief features including landscape and terrain features provide a funnelling effect in many areas. The extent to which the topography can reduce local wind strength is evident from the fact that speeds abate from 6 metres/sec in coastal locations to 5 metres/sec in the adjacent interior. Source: Royal Irish Academy (1979). The mean monthly wind speed within the region is 11 knots with the mean number of days with gales calculated at 13 per annum.

In line with global trends, Ireland's average temperatures have increased, with 10 of the 15 warmest years in the last century occurring since 1990. Temperatures in Ireland are predicted to increase by 1.25-1.5 degrees celsius by 2040, with south-western areas becoming warmer and drier in the summer months. Nationally, rainfall is expected to increase in winter by about 15%, particularly in northern regions with summer predictions allowing for up to a 20% decrease, particularly in south-western regions Extreme rainfall events show more marked changes with more events occurring in the autumn and a 20% increase in 2-day extreme amounts, principally in northern parts of the country. As a consequence incidents of flooding are also expected to increase. Source: Community Climate Change Consortium for Ireland (2008). In the medium term it can be assumed that climate change will exert a significant impact on agricultural activity, fishing, recreation and on the natural environment in the region.

Infrastructure

3.4. Road Infrastructure

With a fragmented settlement pattern, low population densities, poor public transport provision and a high dependence of car usage, the road network represents the principal means of access and transport in the region. For the most part West Cork is linked by an extensive network of roads of highly variable quality, making access to and travel time within the region a particular challenge. To a considerable degree the road infrastructure follows a linear east/west axis, with the north/south axis limited in value and quality due to topographical and landscape constraints.

The principal routes and development corridors include the only national primary route in the region, the N22 Cork-Macroom-Killarney road. The average monthly traffic volume recorded at Ballyvourney accounts for 6640 traffic movements, peaking at 8267 in August. Source: National Roads Authority, (2007). This route serves 30km of the northern periphery of the region and is viewed as of strategic economic importance, given that when completed, it will form part of the national strategic road corridor from Rosslare to Tralee as well as linking to the proposed Atlantic Corridor from Cork to Sligo. Plans for the continuing upgrade of the route including the development of a by-pass at Macroom will potentially leverage significant residential and commercial development within the Lee Valley region, some of which despite its relative proximity to Cork city remains peripheral and remote. While no specific timeframe can yet be confirmed for the development of this vital component of local infrastructure, it is believed that works will only commence in the medium term post-2010. However when complete it will serve to provide high quality access to the northern periphery of the West Cork region and will greatly assist economic development in hitherto peripheral areas.

The south and western areas of the region are served by the 128 km N71 National Secondary Route which forms the backbone of the region's road infrastructure and which links a number of the principal towns in the region (Bandon-Clonakilty – Skibbereen - Bantry) to Cork in the east and Kenmare/Killarney to the west. The average monthly traffic volume recorded at Ballylickey on the western extremity of the route accounts for 4927 traffic movements, peaking at 6473 in August. Source: National Roads Authority, (2003). Traffic movements on the route would be considerably in excess of this figure probably averaging 8000 traffic movements monthly in the Innishannon – Bandon – Clonakilty portion of the route. While limited improvements and upgrades have taken place in recent years these have generally been necessitated by the increased volume of road traffic arising from significant growth in commuting from areas proximate to Cork city as well as from the considerable population and employment growth in Clonakilty. Road improvements completed along the eastern part of the N71 have enhanced access to Cork City and have linked to the emerging inter-urban motorway network. This is and will continue to be of fundamental strategic importance in providing quality and efficient access to and egress from the region.

The strategic value of the Castletownbere - Glengarriff link route to the local fishing, aquaculture and tourism industries has also been recognised through ongoing improvements, though substantial works, not least in connections and upgrades to the R585 eastwards remain outstanding. All in all however, the overall poor standard of the system is seen as a considerable handicap to the economic development as well as service provision and access in West Cork, although there is clear evidence of a close correlation between the infrastructural improvements completed and the stimulation of economic activity. The problem is particularly marked with regard to the development of non-coastal areas of the region, which are serviced by a network of local roads, many of poor quality. The town of Dunmanway, which serves a large rural hinterland and which is located midway between Bandon and Bantry on the R586, has suffered notably in investment and development terms in contrast with all other towns in the region, due to deficient access and infrastructure.

Car ownership in the region is categorised according to the number of households with 0,1,2,3 or more cars. Percentages in the multiple ownership categories significantly exceed national averages (see Table 3.2). In contrast, the percentage of households with no car is significantly lower than the national average, reflecting a comparatively high level of mobility and car dependency within the West Cork region.

Table 3.2: Car ownership

	Total Households with No Car (%)	Total Households with 1 Car (%)	Total Households with 2 Cars (%)	Total Households with 3 Cars (%)
West Cork	13%	36%	39%	12%
South West	18%	37%	35%	10%
National	20%	39%	33%	9%

Source: CSO (2006)

In total, 62% of the local population use car transport as the principal means of transport to work, school or college (see Table 3.3). Source CSO (2008). The high level of car dependence is more marked in western areas where public transport infrastructure is poorly developed. Average commuting times to work suggest that car dependency is vital even for comparatively short commutes to work, school or college.

Table 3.3: Commuting/Journey Time to work, school or college

	Journey Time <15 Mins (%)	Journey Time 15-<30 Mins (%)	Journey Time 30-<45 Mins (%)	Journey Time 45-<60 Mins (%)	Journey Time 60+ Mins (%)
West Cork	45%	28%	16%	6%	5%
South West	41%	33%	17%	5%	4%
National	38%	30%	17%	6%	9%

Source: CSO (2006)

As there is no rail network within the region, public transport is confined to limited scheduled Bus Éireann services. Since 2002 this has been supplemented by West Cork Rural Transport, funded under the National Development Plan (NDP). This service, which currently operates 35 different services serving over 25 local towns and villages, facilitates vital social and economic access within the region and accounted for over 35,000 passenger journeys in 2007. Initially the town of Bantry, its hinterland and the neighbouring peninsulas formed the fulcrum of the service but the initiative has recently developed the service to link locations in the eastern part of the region. Plans are currently in place to deepen existing service provision as well as expand services to Macroom, Coachford, Kinsale, Clonakilty and Bandon.

The nearest railhead for passenger and freight services is located in Cork City.

3.5. Port Infrastructure

The port infrastructure of the region remains a key issue given the commercial and amenity value of the fishing and tourism industries locally but also in terms of scheduled passenger and freight services to the United Kingdom and Continental Europe. The Port of Cork, Irelands second largest, remains within comparatively easy access for areas within the eastern part of the territory. There are plans at present to relocate the port and to develop a new €160m container terminal at Ringaskiddy. Currently, the Port of Cork is engaged in discussions to establish Ireland's first direct shipping route to northern Spain. If successful, this has the potential to reduce the number of truck movements within Ireland by up to 500,000 per annum. It is also expected that the development would substantially reduce costs for exporters for direct access to continental Europe. This is particularly relevant for the export of manufacturing, agricultural, fisheries and forestry produce from the region. The deepwater berth at Ringaskiddy is of particular strategic importance not alone for facilitating the export of local produce but also in tourism terms, given seasonal sailings to Roscoff, France. The suspension of the Cork –Swansea passenger service in 2007, which was of fundamental importance to local tourism, has had a disproportionate negative impact in the West Cork region where many tourism establishments have reported considerable loss of markets and income, casting considerable doubt about their future viability. The deepwater facility at Whiddy Island and in Bantry Bay is also of considerable economic value for its oil storage function, aquaculture, tourism and a nascent cruise liner trade.

Fitzpatrick & Associates reporting in the NUTS II development strategy for the combined regional Authorities (1999) identify a number of local port development priorities including:

"Support for the continued development of Bantry Harbour, the Whiddy Island facility and the smaller ports in West Cork because of the important role they play in the economic development of local areas is proposed"

Second only to Killybegs in terms of the economic value of fish landed; the region's principal fishing port is located at Castletownbere in the far western periphery. The ports of Union Hall, Baltimore, Bantry, Schull, and Kinsale are also of critical economic value not alone in terms of landings but also in the increasing development of shore based processing and support activities/facilities. Additional port and pier facilities which are of significant value to the local fishing, aquaculture and leisure industries are found in Courtmacsherry, Ring, Reen, Castletownshend, Ahakista and Crookhaven.

3.6. Air Infrastructure

Cork Airport, the Republic's third largest, is located adjacent to the eastern boundary of the West Cork region. Approximately 80% of the West Cork population resides within a 90 minute commute from the airport. The economic competitiveness of the region and the key sectors which underpin it rely heavily on the facility for market access and export trade. Accordingly, Cork airport plays a critical role in facilitating and servicing the economic needs of the region particularly in the growth of internationally traded services, tourism and manufacturing exports. The recently upgraded facility offers both scheduled and charter services for passenger and freight and has seen an unprecedented increase in passenger demand over the last decade to its current level in excess of 3.2m passengers annually, the 15th consecutive year of passenger growth. It is predicted that passenger throughput at Cork airport will reach 5m by 2020. In 2007, 11 airlines accommodated 2.8m passengers on 42 scheduled routes to Great Britain and Continental Europe. Chief amongst these are services to the principal London airports, Amsterdam, Paris, Rome and Dublin as well as other destinations including Berlin, Munich, Barcelona, Prague, Nice, Gdansk, Geneva, Warsaw and Vienna. An additional 400,000 passengers travelled on charter services from Cork airport to various locations in Spain, Turkey, Bulgaria, Croatia, Portugal, Greece, Italy and Tunisia.

Air transport to the region can also be facilitated through Kerry airport which offers a combination of scheduled and charter flights to a range of domestic, British and Continental destinations. This is of significant potential for access, trade and tourism in the western and northern periphery of West Cork.

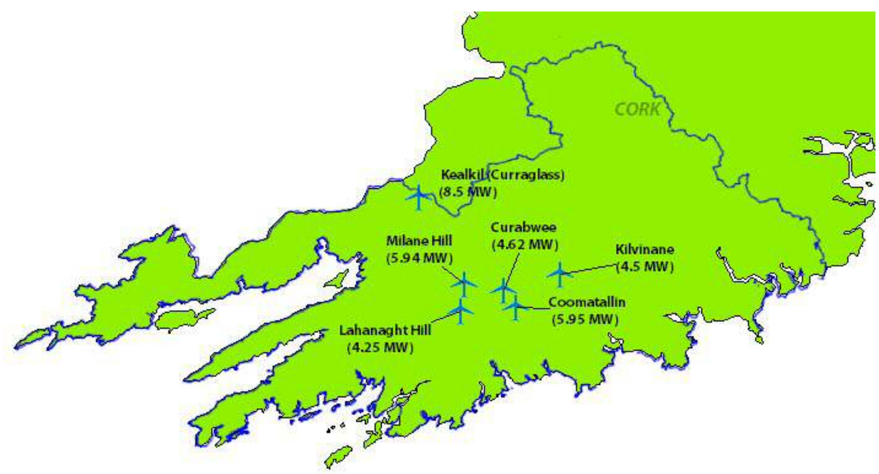
Fuel price inflation, environmental concerns (including climate change and carbon emissions) and widespread predictions that the era of cheap travel has peaked suggest a period of great volatility for airline carriers and there can be little doubt but that earlier forecasts for growth, route development and passenger throughput will be extremely difficult to achieve in the short to medium term.

3.7. Power & Energy Infrastructure

The quality of the power supply is a major determinant in attracting new as well as retaining existing commercial development in the region. The principal towns and villages located on the N22/N71/R586/R600 routes are serviced by 38KV lines. Some rural areas in the region suffer from infrastructural deficiencies in capacity and quality of electricity networks, particularly with regard to 3-phase supply. Fragmented settlement patterns and low population densities also give rise to difficulties in meeting demand in rural areas at the extremities of the network. Over the medium term, the region will require investment to renew ageing networks as well as to upgrade existing systems to achieve international standards of supply. This is of particular importance in ensuring strong economic growth, regional competitiveness and facilitating local industrial development. The extension to the natural gas pipeline to West Cork has provided an alternative to electricity and will help meet the energy concerns of three of the regions most significant industrial concerns at Innishannon, Kinsale and Ballineen. Again the close correlation between economic activity and infrastructural activity is amply demonstrated with the larger scale economic concerns in internationally traded services, IT, food and pharmaceuticals representing a notable *pull factor* for large scale infrastructural development.

As a result of recent energy efficiency and alternative energy initiatives, an increasing proportion of the regions energy requirements are being generated from renewable sources. The ESB generate 27MW from two hydro facilities on the river Lee at Inniscarra and Carrigadrohid. Smaller private hydro initiatives in Adrigole, Bandon, Bantry and Glenlough generate an additional 1.6MW. The strong wind resources of the region are currently being tapped by 6 windfarms (see Figure 3.2) which provide 33.76MW.

Figure 3.2: Windfarms in the West Cork region



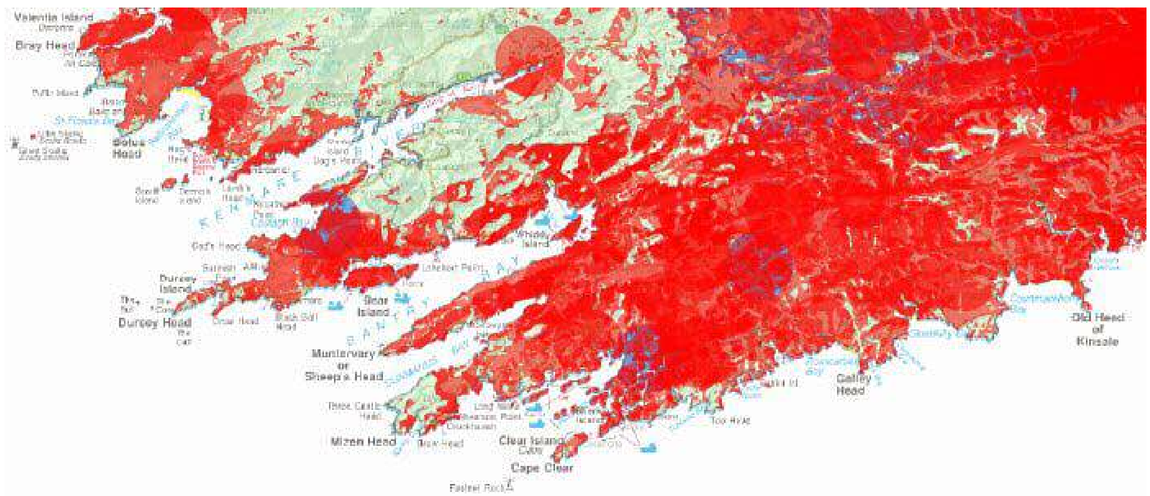
Source: SEI (2008)

There is scope for further development though large scale proposals have recently met with considerable local opposition. There is a strong interest in developing renewable energies and activity in this sector is developing rapidly in response to the rising price of oil. A significant number of businesses have established in this field and the sector is likely to be an important source of economic growth for West Cork. Agriculture will also play an important role in providing fuel crops and in developing processing and energy supply companies. Small areas of miscanthus have been planted to test the market as a pilot initiative. Notable renewable energy generation projects to date include a combined heat and power plant at Grainger's in Enniskeane (1.8MW of electricity + 3.5MW of heat) and a wood pellet boiler at Inchydoney Island Lodge & Spa hotel (150KW).

3.8. Telecommunica -tions Infrastructure

The regions telecommunications infrastructure is seen as critical in ensuring regional competitiveness, social engagement and as a means of accessing public services. The backbone transmission network is 100% digital with Eircom currently operating a Synchronous Digital Hierarchy (SDH) network in West Cork. Allied to the commitments and investments under the National Broadband Scheme, this allows effective broadband connectivity to Bandon, Kinsale, Clonakilty, Skibbereen, Macroom, Dunmanway and Bantry. A core objective of the National Broadband Scheme is to encourage and secure the provision of broadband services to areas in which services are not currently available. It is the view of the Department of Communications, Energy and Natural Resources that parts of West Cork remain a black spot for current and future broadband provision (see Figure 3.3).

Figure 3.3: Broadband Provision in West Cork



Source: Department of Communications, Marine and Natural Resources (2008)

While Eircom has a lot of optical fibre in the ground in the region, the local access network is considerably more variable. Cost and market factors however suggest that fibre based services cannot be delivered uniformly throughout the region. As a consequence of this, a variety of technologies and service providers are required in order to deliver services into towns and villages with local wired and wireless distribution systems employed to deliver the first mile of connectivity from users to the backbone. In recent years the County and Group Broadband scheme co-ordinated by the South Western Regional Authority has facilitated the provision of broadband coverage in rural villages and their hinterlands in Goleen, Crookhaven, Toormore, Lowertown, Dunbeacon, Kilcrohane, Durrus, Ahakista, Baltimore, Glengarriff, Schull, Ballydehob, Union Hall, Castletownshend, Leap, Glandore, Lisavaird, Rossmore, Ballygurteen, Carraigadrohid, Ardfield, Rathbarry, Ballinspittle,, Castletownbere, Crossbarry, and Kilbrittain.

Despite these upgrades and investments, the comparatively low level of broadband adoption by private households in West Cork suggests, that deficiencies continue to exist in access, provision, reliability, quality and cost. Substantial numbers of private households still depend on sub-optimal dial up connections.

Table 3.4: Broadband adoption in private households

	% Private Households with PC	% Private Households - Broadband	% Private Households - Other	% Private Households - None	% Private Households - Not Stated
West Cork	56%	12%	36%	47%	5%
South West	55%	16%	29%	48%	7%
National	55%	20%	27%	48%	5%

Source: CSO (2006)

Specific statistics on broadband use and penetration for business users is not available and although this is believed to be extensive, similar constraints with regard to access, reliability and cost remain thereby re-inforcing peripherality and a continuing digital divide.

Since 2006, all primary and post-primary schools in the region enjoy high speed broadband connectivity facilitated through investments made by Government Departments and the Telecommunications and Internet Federation.

The mobile phone infrastructure within the area is rather fragmented. All four providers show that they have variable provision of services throughout the West Cork region and in particular in the peninsular areas and on the highland and lowland areas.

The development of the West Cork Technology Park in Clonakilty has stimulated additional infrastructure investment on the part of licensed telecommunications providers in the region and with future employment growth at the facility, offers considerable further opportunity for the development and upgrading of ICT infrastructure and capacity in the region. The liberalisation of the telecommunications market will continue to spur the introduction of new service offerings, price cuts and will further facilitate the "unbundling of the local loop". The net effect of such changes should be faster, more efficient and cheaper telecommunications access for the region, an issue of fundamental importance in ensuring balanced regional development, economic competitiveness, the attraction and retention of foreign direct investment, optimal access for online public services as well as unlocking the potential of information and communication technologies to address issues of social disadvantage and exclusion.

Socio-cultural Profile of West Cork

3.9. Population

The West Cork region has a total population of 101,212, representing an increase of 17.7% in the period 1996 to 2006 and an increase of 9.6% over the period 2002 to 2006. For the most part, population increases were recorded in all of the regions principal towns over the period 2002 to 2006, Clonakilty (9%), Kinsale (2%), Macroom (20%), Bantry (5%) and Skibbereen (17%) and in some of the larger villages, particularly in areas within commuting distance of Cork City.

Whilst the region generally follows a rural settlement pattern, there is a noticeable increase in density within the periphery of Cork city. There are 12 towns and villages with a population of over 1,500. The area has 3 towns that are classified as ring towns and are also within the CASP area: Bandon (5,971), Macroom (3,407) and Kinsale (2,298). Beyond the immediate zone influenced by the city are the towns of Clonakilty (3,745), Dunmanway (2,399), Skibbereen (2,338) and Bantry (3,307).

In the western part of the region, notable population increases in excess of 10% were recorded in parts of each of the peninsulas. In each case the vibrancy of local villages appears to be a catalyst for growth, particularly for in-migrants to the region. Static populations or areas where population declines were recorded in the period 2002-2006, include the extremities of the peninsulas and in a significant number of rural locations in the Dunmanway hinterland. The town itself is notable for the fact that of all the region's main settlements, the area recorded the largest decline in population over the 2002-2006 period, a 9% decrease. Towards the eastern part of the region the area of Kinsale Rural recorded the highest increase in population of 25.5% in population over the 2002 census figure.

In terms of growth on the existing population levels within the CASP area, the greater proportion of the anticipated population growth will occur in the Macroom Town area (see Table 3.5), with an increase of 49% projected over the period 2006 to 2020 figure.

Table 3.5: Future Population Projections

Area	2020 (CASP Projections)	% Projected Increase 2006-2020
Bandon Town	9,460	3.11%
Bandon Hinterland	11,402	1%
Macroom Town	5,080	49%
Macroom Hinterland	9,798	<1%
Kinsale Town	6,147	<1%
Kinsale Hinterland	6,414	<1%

Source: Indecon/RPS/Savills HOK (2008)

Critically, many areas with an already low population density of less than 25 persons/km² have now remained static or fallen marginally, demonstrating a persistent population decline over the last decade. The region has 75 DEDs with a population density of less than 25 persons/km². The overall population density for the region is 32 persons/km², which is well below the South-West at 51 persons/km² and the national average of 61 persons/km². The range of population densities within the region is 3 persons/km² in Ahil, north of Bantry to 2,106 persons/km² in Kinsale Urban. See Appendix 6 for a map of the population density of the region.

The percentage of people of working age of the West Cork population is 65%, which slightly deviates from the South West 68% and 69% nationally. The age dependency rate of 34.5% is significantly higher than the South-West at 31.9% and a national figure of 31.4%. The distribution is relatively uniform, with a small amount of areas close to Bantry, Drimoleague and Skibbereen experiencing a dependency ratio of higher than 42%. The range of dependency figures spans from 27% in Bandon to 49% in the DED of Kilmaloda West. The youth dependency rate in West Cork of 22% is significantly higher than that of the 20% in the South-West and nationally. Again the elder age dependency of 13% is higher than that of the South West (12%) and 11% nationally. Of the total household figure of 34,565, 28% are persons living alone with 18% over the age of 45 and 10% over the age of 65. Of the total figure of persons over 65 and living alone, the figure ranges from 3.4% in the Innishannon area close to Cork City, to 28% in Goleen on the Mizen Peninsula. The average figure for the region is 10%, which is significantly higher than the South West at 9% and the national figure of 8%. Source CSO (2006). See Appendix 6 for further details.

There are 34,565 total permanent households in the West Cork region. The housing stock within West Cork is diverse and varied. Of the total permanent households, 22% were built prior to 1919, followed closely by housing stock developed in the period 2001-2006 at 16% and 4% from the period 1961 to 1970. Furthermore the types of ownership of these houses are as follows: 34% are owner occupied with a mortgage, 45% owner occupied with no mortgage and 16% rented from either a local authority, voluntary body or another. The average number of persons per private household for the county of Cork is 2.9, then Cork as a whole and the national figure is 2.8 (CSO, 2006). The projections in the CASP Update (2008) have indicated that there will be an additional 4,596 households within the towns and hinterlands of the Bandon, Macroom and Kinsale area by the year 2020.

There has been a significant change in the household structure over the past two decades, particularly with the increasing participation of women in the workforce. There are 17,979 family units in the West Cork region, with 61% of these family units having a child less than 15 years of age, compared to 60% in the South West and 61% nationally.

3.10. Social Structure

With some exceptions, the West Cork region has proved to have a strong ability for concerted co-operative action at local and regional levels and in a variety of sectors. It is clear that there is a high level of integration, not just at the social level but between social and economic aspects of the area – livelihoods and social relations are all closely interrelated through their connection to the natural resource base of the area.

Whilst community cohesion is strengthened by the role and function of traditional institutions such as religion, GAA and local schools, this has been supplemented by a wide array of local community initiatives and structures including tidy towns and pride of place competitions which are extremely successful in harnessing local community input and participation. This is evidenced by a succession of national award winners such as Clonakilty, Dunmanway, Kinsale, Eyeries and Rathbarry. This local drive and leadership is fundamental to the success of any development initiative and on its ability to foster and harness this leadership.

With regard to community and leadership structures, the LEADER Programme, amongst others, has developed extensive links to a wide range of community and voluntary organisations, the greater proportion of which are affiliated to the Community and Voluntary Forum of the Cork County Development Board. There are 543 groups in West Cork that are affiliated to the Community and Voluntary Forum, 44% of the total for the county.

Community ownership and responsibility in local development has been greatly facilitated through infrastructure, amenity enhancement, village renewal, cultural activities etc supported by the LEADER Programme in West Cork over the last sixteen years. In addition, volunteering workshops, social inclusion initiatives and community training have all served as particularly useful channels in stimulating voluntary and community participation.

In the 2006 census, 35% of the West Cork population stated that they were involved in some form of voluntary activity in their local communities, compared to 31% in the South West and 29% nationally. Again this demonstrates the enormous amount of social capital, civic spirit, active participation and goodwill, which benefits the community as a whole, and is particularly evident within the region.

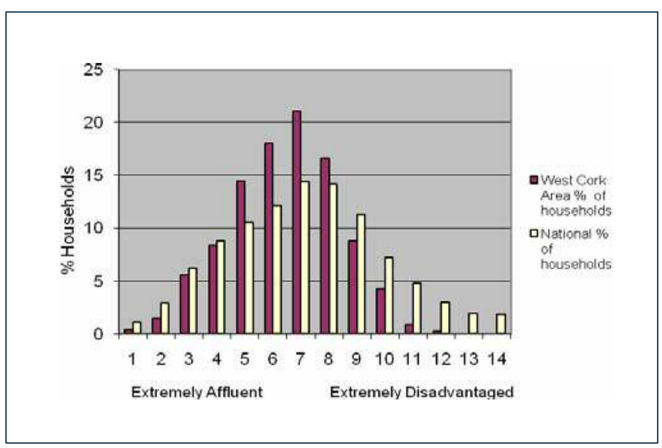
There are many examples of social capital in action in community associations, tidy towns groups, community alert, community healthcare and also in the field of agriculture such as the farming organisations, ICA, farm discussion groups, co-operative boards, all of which help to build connections between people, build trust and reciprocity. In addition, there are a significant number of tourism promotion groups, local heritage/historical groups, arts and cultural groups and societies, environmental action groups and various other voluntary interest groups with potential to lead development activity. Mention should also be made of the significant local voluntary input upon which much caring, disability, elder-care and childcare supports and activities depend. Furthermore there are many enterprise networks and associations within the areas of food and craft, which further aids in the capacity building of entrepreneurs in West Cork.

Although strong community cohesion exists, it was once based largely on the traditional homogeneity of the population, peripherality and shared circumstances. Consideration must be given to the effect that the most recent wave of inward migration and the changing life circumstances arising from economic growth will have on this social cohesion. This consideration will be reflected in future animation and capacity building activities in the LEADER Programme. West Cork has benefited from a long tradition of inward migration and religious diversity, both in terms of enterprise and community development. Local innovation, drive and commitment have been enhanced by many who have settled in the region. By and large, in-migration has been met with openness and acceptance. In the 2006 census, 12% of the West Cork population described themselves as having a nationality other than Irish, compared to 11% in the South-West region and nationally, which demonstrates the heterogeneous and cosmopolitan nature of the population in West Cork.

Community and social infrastructure are seen of utmost importance in contributing to the quality of life in any area. In a study seeking to create an objective measure of quality of life factors, (the 16 variables observed included socio-economic factors, health, technology, crime, income and housing), West Cork scored 110.3, some 10 points above the national benchmark figure of 100 (Source: Power and Johns, 2005).

Rural deprivation centres on the issues of isolation, peripherality and lack of accessibility to services and supports. Many consider the '*nearest neighbour*' measure or the distance to post offices or points of service provision as the best indicator. However rural deprivation can be hard to capture as rural areas can contain small pockets of deprivation, surrounded by more affluent areas. The relative affluence and deprivation index for the West Cork region depicts the relative deprivation score for 2006 and again shows an east/west divide, with a higher degree of affluence within the CASP area (See Appendix 6). Moving westwards, there are notable pockets of deprivation in some areas north of Dunmanway and Bantry that are described as marginally below average or disadvantaged. These pockets of deprivation become more prolific in peninsular areas. Unsurprisingly the change in relative deprivation in West Cork over the period 1991 to 2006 correlates to the change in economic circumstances within the general population, with many DEDs experiencing a marginal improvement in their deprivation scores. The areas that experienced a dis-improvement were again confined to pockets on the Beara Peninsula, areas north of Macroom and in some areas north of Clonakilty. Again, similar to the previous permutations and analogies, the DEDs within the CASP region were categorised as either a "*marginally improved*" or "*improved*".

Figure 3.4: Affluence and Deprivation Scores



Source: INCA (2006)

As is evident from the Figure 3.4, the recorded deprivation in West Cork clusters around the median values of 6 to 8 on the INCA Affluence scale, with few recorded extremes of either extreme affluence or disadvantage. Indeed the area has a far higher percentage of 21% at the median value than national figure of 14%.

3.11. Educational Attainment & Participation

Educational attainment and participation can have a profound effect on an individual's earning ability as the average income varies at each educational level, and therefore their professional classification. The educational attainment of the population in West Cork when compared to the South-West and National figures is outlined in Table 3.6.

Table 3.6: Educational Attainment

	West Cork	South West	National
Lower Secondary	22%	22%	21%
Upper Secondary	19.7	21%	21%
Technical or Vocational Education	10%	9%	9%
3rd Level Education	29%	30%	31%

Source: CSO (2006)

The West Cork region is broadly on a par with Cork County, the South West and national figures in relation to all the categories of educational attainment, but the area has a higher participation rate in technical or vocational education exceeding all the other categories. This may be partly accounted for by increased participation in trades and activities related to construction. Within the region, 12% of people who had ceased full-time education left school by the age of 15; a substantial decrease on the 21% figure in 2002. However, when looked at in a DED basis there are considerable deviations from 4% (near Baltimore) to 25% (near Rosscarbery), as a pattern emerges showing an increase in early school leavers as one progresses westwards and particularly in peninsular areas. This may reflect the presence of a higher proportion of elderly people, who attended school in an era with a lower average school leaving age. The CASP area is uniform in that most DEDs have less than 10% of their population with no formal education or primary education only. Furthermore, this is also the area in which a proportion of the local population greater than 35% possesses a third level education. This demonstrates a clear correlation between participation, attainment and employment. Throughout the remainder of the area, there are significant deviations particularly around the town and village centres of Clonakilty, Rosscarbery, Ballydehob and Schull, areas along the N71. Moving northwards, the situation is quite varied with less than 15% of the population in DEDs north of Bantry and Drimoleague with a third level education.

Those involved in the higher or lower professional classes constitute 37% of the population, which is significantly higher than the national average of 33%. Equally, 17% of the West Cork population is involved in semi and unskilled labour compared to the national average of 19%, again demonstrating that the area exceeds national figures. The peninsulas exhibit a relatively high percentage of part-time workers. This is highest where there are also a high proportion of people involved in agriculture. The poorer soil and terrain in these areas, combined with typically smaller holdings mean that farms do not provide a viable income. Employment in fish processing and the tourism sector are also seasonal in these peripheral areas.

The presence of NUI Cork and CIT close to the region is regarded as beneficial to the many diverse industries with an increasing highly skilled graduate expertise and the possible employment generation for these graduates. Both of these colleges provide a wide range of courses in a variety of disciplines. Cork Institute of Technology offer courses in Business and Humanities; Engineering; and Science. The National University College Cork has a range of fields of expertise such as the Colleges of Business and Law; Arts, Celtic Studies and Social Science; Medicine and Health; and Science, Engineering and Food Science. Furthermore, there are other third level institutions in the West Cork area. Teagasc have an agricultural educational college based in West Cork, which is only one of three in the country. Teagasc also provide an e-college for the delivery of on-line agricultural, horticultural and food sector training. There is also a Bord Iascaigh Mhara training facility in Castletownbere. This facility provides multi-disciplinary training to the marine sector i.e. aquaculture, fisheries, maritime and safety functional training, and is the only training facility of its kind in the South West of the country. The Vocational Educational Committee has 2 outdoor activity centres, 4 colleges of further education and 4 Youthreach facilities located across the region. There are many Outreach Programmes in the area, with courses being provided in the West Cork Technology Park in a variety of disciplines, along with distance learning through many of the Universities and Colleges. Furthermore, there are 3 Cope and 5 Co-Action facilities in the area catering for intellectual and physical disability, along with 1 National Learning Network resource centre and 1 REHAB care facility.

Needs Arising

The towns within close proximity to the city of Cork and the commuter area have felt the influence of the strongest population and economic growth. However, it is now clear that development pressures within these towns will led to further difficulties for infrastructure, local community facilities and services.

The aging population of the region and indeed the burgeoning youth population have implications for future service provision of both elder care, child care and other associated services. It will become even more important to involve young people so that they feel fully engaged in the decisions, opportunities and challenges facing their communities. Furthermore, the uneven spatial age distribution is evident throughout the West Cork region and this will require the specific targeting of development supports in order to address localised issues. The area has a higher than average youth population, which has implications for social, sporting and community facilities (including youth cafes, etc) for the future. The aging population within the region has implication for the provision of elder care, both in a private and public capacity. This also has implication for future access to hospital care and the provision of age appropriate services within the region. The West Cork region has an extremely high level of private house ownership, with most of the housing stock from the 1970s onwards. This implies that most of the buildings within the region should be of high quality and well insulated. The Warmer Homes Scheme is presently being rolled out across West Cork, and is co-ordinated by the West Cork Community Partnership.

Broadband stands out as a necessary service, which can bring significant opportunities to rural areas, as it brings about a level playing field for rural communities by allowing access to information and the ability to avail of e-services.

When considering the third level qualification attainment of the West Cork population, it becomes apparent that there is a significant divide in the region. Whether people of working age have left the region to find work or whether they have moved to larger urban centres. To maintain a rural population, relevant employment must be provided within the region. A requirement will be to ensure that such employment is matched to the skills base and is centred around activities appropriate to local resources and market opportunities. In order to tackle deprivation solutions must be found to at a grassroots level and it is imperative to promote community engagement and empowerment in order to find rural solutions for issues of accessibility, health and education through further outreach programmes and services.

It is thought that a vibrant rural community of the future will thrive on its local distinctiveness, community engagement and participation, the attractiveness of its landscape and inherent culture, which should thereby encourage people to stay in a place which they are committed to. It is also evident that there is a strong sense of regional identity, both within the West Cork area and in terms of the perception of the area from outside. The spirit of volunteerism is strong in West Cork and represents a key asset to be harnessed in rural development.

Economic Profile

3.12. Overview

In the West Cork region a total of 44,526 of the local population (56%) are classified as *"Population at Work"*. This represents a significant increase from 1996 (30,804) and 2002 (36,496) respectively. In the period 1996-2006 the percentage increase in the labour force for West Cork was 6.9% with virtually all district electoral divisions in the region recording increases.

The key fundamentals of economic activity, labour force participation and economic dependency for the West Cork region are presented in Table 3.7:

Table 3.7: Labour Force Participation, Unemployment & Economic Dependency rates

	West Cork 2006	South West 2006	National 2006
Labour Force Participation Rate	59%	60%	62%
Labour Force Participation Rate (Male)	71%	71%	72%
Labour Force Participation Rate (Female)	48%	50%	53%
Unemployment Rate	6%	8%	8%
Unemployment Rate (Male)	6%	8%	9%
Unemployment Rate (Female)	6%	7%	8%
Economic Dependency Rate	1.27	1.24	1.20

Note:

The labour Force Participation Rate is calculated as the % of the population aged 15 years and over who are active in the labour force (at work, job seekers or unemployed). The unemployment rate is the sum of those unemployed and first time job seekers expressed as a % of the sum of unemployed, first time job seekers and those at work. The Economic Dependency Rate is the ratio of the inactive population (children under 14, unemployed, first time job seekers, home duties, students, unable to work) to those at work.

Source: CSO (2006)

The higher levels of Labour Force Participation tend to be found in the CASP designated region, whilst the West Cork peninsulas and areas contiguous to Bantry, Skibbereen, Dunmanway and their hinterlands have significantly lower rates than regional or national averages. The labour force participation rate for women in the West Cork region is 47.8%, well below that of men at 70.7%. Access to education and training is generally recognised as a key determinant in facilitating labour force participation. Although labour force participation has risen considerably, there remains a problem with unemployment, underemployment or reliance on seasonal and part-time work in the agriculture and tourism industries in peripheral regions.

In general, unemployment rates peak in peripheral rural areas distant from the main settlements, although there are notable spikes in local unemployment in the hinterlands of Bantry, Skibbereen and Kinsale. Economic dependency is more variable throughout the region with lower levels tending to cluster within the CASP region but higher than average levels throughout the remainder of the region.

Figures released by the CSO in June 2008 provide compelling evidence of an economic downturn, with each Social Welfare Office in West Cork recording dramatic increases in the live register numbers (see Table 3.8). Notable increases in female unemployment suggest that unemployment is increasing across all economic sectors. In total, the numbers on the live register have increased by 28% in the year to May 2008, with the largest percentage increases occurring in two of the principal towns, Macroom and Bandon respectively. This is a particularly worrying development as it indicates a significant deterioration in unemployment figures and economic dependence in the CASP region since the 2006 census. Concerns exist that such increases will continue in all locations in the medium term.

Table 3.8: Live Register Figures in West Cork

Location	May 2007	May 2008	% Increase
Bandon	483	725	50
Bantry	308	396	28.5
Bantry (SWLO)	137	163	19
Clonakilty	419	547	31
Dunmanway	190	-	-
Kinsale	579	709	22
Macroom	402	678	69
Skibbereen	333	428	29
Total	2851	3646	28

Source: CSO (2008)

Such negative trends pose interesting questions not least whether employment target projections contained within the ***CASP – Strategy for Additional Economic and Population Growth*** can actually be attained. Table 3.9 suggests planning for the following employment targets in the period to 2020.

Table 3.9: Employment Projections to 2020

Town	No.
Bandon Town	4,785
Bandon Hinterland	3,530
Macroom Town	2,337
Macroom Hinterland	2,518
Kinsale Town	2,308
Kinsale Hinterland	1,333
Total	16,811

Source: Indecon/RPS/Savills HOK (2008)

The composition of the local economy can be determined by using the "At Work by Industry" measure of the CSO 2006 census. The economic sectors are weighted according to current employment levels rather than economic value. Table 3.10 outlines data for 2006 which reveals the following percentages for the West Cork region:

Table 3.10: At Work by Industry

Activity	West Cork 2006	South West 2006	National 2006	% change West Cork 1996-2006
Agriculture, Forestry, Fisheries	13%	7%	5%	-12%
Manufacturing	16%	17%	15%	-2%
Construction	15%	14%	13%	+7%
Commerce & Trade	14%	15%	17%	-4%
Transport& Communications	5%	5%	6%	+1%
Public Administration	4%	5%	6%	+1%
Professional Services	18%	19%	19%	+3%
Not Stated	15%	18%	19%	+6%

Source: CSO (2006)

The figures reveal a considerable dependence on agriculture (and agricultural related manufacturing and services activity) and construction within the region. Whilst agricultural employment has decreased dramatically in recent years, its proportion of the total workforce has consistently exceeded regional and national figures by factors of 2 and 3 respectively. Considerable variations exist in agricultural employment at local level. In eastern areas it comprises as little as 5% as opposed to 60% of total employment in some western and peripheral areas. It should also be noted that the sector masks a degree of under-employment and sub-optimal activity and furthermore the predicted polarisation and rationalisation in this sector will further reduce employment levels locally.

Employment in the construction sector also exceeds regional and national averages. As a consequence of the sustained economic growth of the last decade, it can be seen that employment in this sector has expanded dramatically, in many cases absorbing the declines in agricultural employment and manufacturing employment. However the recent dramatic decline in construction activity suggests that employment within this sector cannot be sustained in the short term. Anecdotal evidence locally already suggests considerable employment losses in this sector since the 2006 census. Furthermore, the overhang of residential and commercial property currently vacant in the West Cork suggests it will be some considerable time before construction sector activity can again absorb employment numbers as heretofore. In its 2007 annual report, the West Cork Citizens Information Service, which provides comprehensive information on public services, social and civil rights, reports a 50% increase in enquiries from those at operative level in the local manufacturing, construction and services sectors seeking information and clarification on redundancy and social welfare entitlements.

The region accounts for a broadly comparable level of employment in the professions, services, commerce and public administration. This illustrates a convergence in recent times and the continuing potential for employment growth in tourism, professional and internationally traded services.

26% of the working population is classified as self employed, which is notably higher than regional or national averages. Agriculture Fisheries & Forestry (35%), Commerce & Trade (18%) and Construction (17%) account for the greater proportion of self employment locally. With the exception of Commerce and Trade, a convergence to regional and national averages can be expected as economic conditions deteriorate and impact on construction activity. Further contractions will also occur in the farm and fisheries sectors. To some degree, this may be offset as the region experiences some anticipated growth in the services sector.

The spatial distribution of economic activity the West Cork region is contained in Appendix 6. This illustrates the clustering of non-agricultural economic activity around the main towns and settlements and reveals notable regional variations in hospitality and construction sector employment. Source: Kompass (2007).

Eleven West Cork based companies feature in the listing of the top 1000 companies ranked by turnover. These companies principally engaged in Pharachem, ICT, Construction and agri-food services represented a combined turnover of €2.04bn and account for total employment of 3,424 (not all of which is located within the region) in 2007. (Source: Irish Times, 2008).

An assessment of the key components of the local economy is presented as follows:

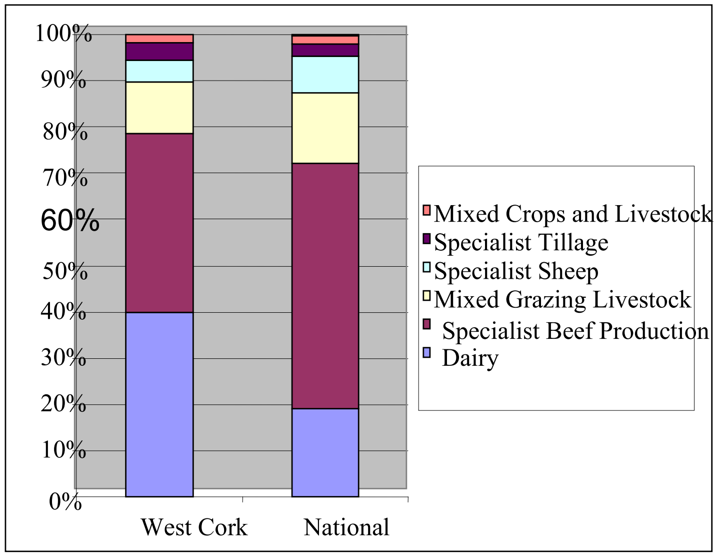
3.13. Agriculture

The practice of farming is extremely important in West Cork and as with most rural areas it needs to be recognised for it’s multi-functionality in that it has valuable economic, social and environmental functions. This concept of multi-functionality is extremely important in judging the role that agriculture can be expected to play in West Cork’s future, as it is the basic argument for continuing the subsidisation of agriculture. Producers do not receive a market payment for providing non-economic services, if these are valued by society farmers should then be compensated for their provision.

Outlook for Agriculture

The most important function of agriculture in West Cork is to provide employment. Employment in Agriculture, Fishing and Forestry as recorded in the 2006 census involves 5,231 people in the area, representing 13% of all employment in West Cork (CSO, 2006). Included in this number are 4,111 people listed as self-employed. Whilst a certain proportion of this figure includes fishing and forestry it can be seen that agriculture remains a very important source of income for the region as a whole. Even though employment in these sectors has already declined by 30% since 1996, the process of restructuring has further to go. It is expected that the shift out of agriculture will continue across all types of farming. Average family farm income in the region (South West) has increased slightly since 1996 from about €18,000 to €20,000 (National Farm Survey, 2006), though when adjusted to inflation or compared with the average industrial wage this represents a very significant decline. By way of comparison, average earnings for males in full time employment rose from €22,300 in 1998 to €32,471 in 2006, an increase of 45%. Compounding this decline is the uncertainty around the future viability of the source of that income, whether market derived or paid directly as an income subsidy. The source of income varies widely depending on the nature of the farming activity (on average direct payments account for 78% of family farm income but are in excess of 130% for cattle and sheep only farms). Figure 3.5 shows the breakdown of farms by farm type in 2001.

Figure 3.5: Farm Type



Source: Census of Irish Agriculture 2001

Dairying

The South West region (Cork and Kerry) accounts for 33% of the national dairy herd and is the most important commercial farming activity (in terms of value and value added) in West Cork. In 2001 West Cork accounted for about 10% of specialist dairy farms in the country with 2,620. Dairy farming appears to be in an improved position at present having reversed the trend of decreasing prices. The expectation is that with world consumption of dairy produce increasing, prices will gradually rise though any real increases may be low and subject to fluctuation. Whilst dairying is practised widely in West Cork the average size of the dairy unit is small, particularly in the western part of the region. Many farms remain unviable despite the increase in prices – nationally only 57% of dairy farms are reported as viable (Hennessy, RERC, 2007). With a continually rising cost base, further specialisation is seen as the only route to viability and although cow numbers are likely to increase by around 6%, the number of farms involved is likely to continue decreasing at about 3% per annum. On a positive note, diary farmers in West Cork are seen to be very progressive as shown by their success in national awards. This willingness to take up best practice and adopt new technology suggests that dairy farmers are also well placed to look at alternatives for diversification. By 2015 the total number of dairy farms in West Cork is expected to be about 1500 (Teagasc Sectoral Road Maps, 2008)

Beef and Sheep

Beef and sheep farms combined account for about 42% of farms in West Cork. There is considerable uncertainty around the future of both types of farming in the context of the CAP Health Check and WTO agreements. It is difficult for beef and sheep farmers in Ireland to produce at world market prices where there is huge competition from low cost ranch style producers in South America and New Zealand. The impact of a shift to energy crops and forestry will also be very strongly felt in this sector in terms of competing for land use and feed supplies. However, it may also reduce the volumes produced in low cost countries if there is a switch to ethanol production. Teagasc estimates that overall numbers of beef cattle and sheep will reduce by 10% to 2015. This sector also has a considerable proportion of farmers working off-farm

Horticulture

Fruit and vegetables are the second largest category of food at retail in Ireland (dairy being the first), though most of this is represented by imported produce (Bord Bia, 2008). The most significant commercial crop is mushrooms, though these are not grown in the West Cork area where field vegetables are most significant. This is a sector that does not benefit from direct supports and is completely open to world market prices. Cork county accounts for 10% of Irish field vegetable production though very little of this is in West Cork, the greater proportion being located close to distribution centres in Cork city.

Tillage and Energy Crops

Cereal growing accounted for about 8% of agricultural land use on 260 farms in the area in 2001. A further 2% of land was used for sugar beet that has since ceased to be produced as a crop for sugar and is now grown on a much lower scale for feed only. The major rise in cereal prices globally and domestically in 2007 has resulted in renewed interest in crop production and the medium term outlook is positive. Teagasc anticipate that the most significant growth in this sector will be in maize, oilseed rape and perennial energy crops, like willow and miscanthus. In total, this will bring 43% more land into tillage production nationally. The impact in West Cork is likely to be less than this owing to the unsuitability of most of the land and farm structure in the western part of the region. Capacity and know-how in the production and processing of biofuels has begun well in the region, with examples like Gro Oil in Bandon producing biodiesel and Carbery in Ballineen producing bio-ethanol from whey.

Forestry

Forestry continues to grow in importance as an option for agricultural land use and for many farmers, it represents the opportunity cost or baseline return that could be expected from their land. The area under forest cover represents 9% of the total West Cork area, about 29,000 hectares. (47% in private hands owned either by farmers or investors). Of this slightly less than half is prime commercial forestry on which grants are drawn. This latter section is a potential source of low grade thinning timber to be used as wood chips for local commercial heat users. A major difficulty here, however, is that the average plantation size is well below the minimum size considered viable for the profitable extraction of thinnings. The most significant concentration of forestry planted is in the western and northern parts of the West Cork area, particularly in on more upland and hillside farms. The development of the wood energy market as an outlet for local forestry producers will require considerable collective action to overcome the problems of scale and access.

Timber production from local forestry is an important raw material for the local timber processing sector. Timber processing in West Cork tends to be located away from the larger towns and the more diversified coastal strip. There tend to be fewer employment options in these areas thus increasing the value of timber processing to the local economy. This is part of Irelands largest cluster area of forestry, which extends through Kerry and into Limerick. Spatial concentration of forestry will be critical to developing downstream value added activity. The largest sawmill in West Cork is Graingers in Enniskeane, which directly employs 113 people, while another 100 are involved in forestry and haulage operations linked to the mills. Last year, the company had sales of over €40m, with €9m worth of product destined for the UK market. Other significant timber processing businesses include Palfab (pallet manufacture, 60 employed) and Cygnum (timber frame housing, 50 employed) both in Lissarda in the Lee Valley. Privately owned forestry is not yet a major contributor to local timber processing but will start to come on stream in significant quantities after 2015 as plantations planted from the mid-80's reach maturity. However, the quality of the final harvest will depend on farmers undertaking thinning in the current period.

Organic Farming

Table 3.11 details organic farms in West Cork registered with IOFGA and the Organic Trust. Despite a steady increase in demand for organic produce by consumers (estimated at 25% annually – FSAI, 2004), there has been relatively little growth in the numbers of registered producers locally. Most organic land is used as grassland and the largest product category is still beef and lamb though a simple shelf space analysis would show that most of this is still being sold as conventional produce due to a lack of scale and adequate supply chains. There are also difficulties with sourcing organically grown animal feeds due to the lack of tillage land in organic management. Many of those registered as organic have done so to take advantage of improved REPS payments, which are linked only to land use and management not production or sales. In Ireland the largest share of all organic sales, 43%, is for fruit and vegetables but about 70% of these are imported (Cowan, C., Ní Ghraith, D. and Henchion, M., 2002). Meats (approximately 25%), dairy (approximately 10%), and other organic groceries make up the balance of demand. The uptake of organic farming in Ireland is lagging well behind the rest of Europe, suggesting considerable potential for further growth. The National Steering Group for the organic sector has set a target of 3% of UAA to be either fully organic or in conversion by 2010. This is an ambitious target given the current position. Training and technical support are very important for farmers switching or considering a switch to organic. In contrast to the high level of support services in place in Connaught there is at present no dedicated training facility or technical support staff in Munster. This is likely to be a barrier to the development of the sector in West Cork.

Table 3.11: Organic Production in West Cork

Product type	IOFGA		Organic Trust	
	2000	2008	2000	2008
Grassland	61	54	28	37
Lamb	33	33	12	17
Beef	33	33	7	20
Fruit	10	4	27	7
Vegetables	16	15	13	8
Herbs	3	0	7	5
Poultry	6	17	0	3
Goats	4	1	0	0
Pigs	3	4	1	0
Dairy Products	0	2	1	0
In Conversion				
Grassland	24	18	34	14
Beef	15	10	8	10
Lamb	12	8	6	4
Fruit		1	10	
Vegetables	3	7	7	
Poultry	3	3		
Goats	2	0		
Pigs	2	0		
Dairy Products	1			

Source: IOFGA and Organic Trust member lists, 2000 & 2008. Does not include Demeter members.

Needs Arising

Off-farm employment & Retraining

The viability of direct employment in agriculture underpins all its other functions as ascribed in the multifunctional view – if it cannot provide a direct living then the other non-economic benefits will not accrue to the area without the maintenance of subsidies. In addition to direct payments, about half of farms also have other sources of off farm income, particularly through the spouse working off-farm (41%). The incidence of off-farm jobs and part-time farming is increasing steadily and reflects both increased opportunity in the labour market and declining incomes from farming. However, working off-farm is particularly difficult for dairy farmers, with only 10% of dairy farm holders taking an off farm job. It is widely believed that double jobbing is unsustainable in the longer term and that farms that do not provide a full time income will struggle to appeal to the next generation. Anecdotal evidence would suggest that most farmers taking up off farm employment enter the labour market at a low skill level, particularly in the construction sector. By and large they do not take up further training or education before seeking employment. As a consequence they are not maximising their income and are likely to face an insecure job outlook. The Rural Social Scheme has been an important source of additional income and employment for some part-time farmers. There are 69 on the Scheme in West Cork (65 are farmers, the remainder fishermen) who are employed to work part-time on a variety of community activities and initiatives.

Farm diversification

The option to generate additional income within the farm gate through diversification is an important area of activity in regard to the LEADER programme – supports have been provided across all measures and the role of the Fuchsia brand has been a critical instrument in allowing some farmers to diversify into food and tourism activities. In West Cork the most significant market that farm families have entered has been agri-tourism, 27% of Fuchsia tourism members are on farm tourism businesses. Adding value to farm food produce is an important activity and one that fits well with the local economy and gives farmers greater control over their markets. Local farm discussion groups have identified the development of strategic planning capacity and communication skills as being particularly important for farm families considering farm diversification.

Access to Markets

Whether or not farmers add value to their produce through further processing, access to markets is an issue across the board. Farms producing commodities are largely price takers and have very little bargaining power in dealing with retail multiple buyers. For farms adding value it can still be difficult to access suitable markets, whether retail, wholesale or direct. The development of farmers markets and local collective marketing initiatives has proved a boost in this regard.

Energy

Agriculture is both a user and potential producer of energy. Conventional farming has been described as a way of converting fossil fuels into food, typically requiring approximately 40 units of energy to produce one unit of energy in food. Agriculture is heavily dependent on oil for transport, mechanised production, fertilisers and electricity. Agriculture in West Cork is likely to face significant further restructuring based on the rapid increase in the price of oil. This may result in a stronger shift to organic production, short food chains and greater on-farm energy production. It may also result in agriculture becoming more labour intensive again. An issue related to energy use is the carbon footprint of agriculture and it is possible in the medium term that farmers could be rewarded for carbon retention either through forestry or in the soil itself.

3.14. Food Production

West Cork has a long established tradition of food production with larger enterprises, such as agricultural co-ops on one hand and smaller-scale artisan, niche, farmhouse and speciality producers on the other. Production incorporates a broad spectrum including dairy, seafood, fresh and speciality meat, poultry, preserves, confectionary and vegetables. In all, approximately 50% of local manufacturing firms, accounting for employment of almost 2000 people are involved in aspects of food production with many of these enterprises forming the core of the manufacturing base in remote rural locations. The presence and concentration of these enterprises in West Cork is derived from the multiple factors of location, tradition, raw materials, skills and innovation.

The food sector has experienced strong sales growth in recent years with growth driven by increased consumer demand for variety, convenience and the perceived health benefits of local or speciality food products. It is expected that the speciality industry will continue to build incremental sales on both domestic and international markets. Irish and British consumers spend approximately €6.1 billion on speciality foods, an amount which is increasing year on year. Source: Bord Bia (2004). Indeed Bord Bia regards West Cork as the cradle of artisan and speciality food production in Ireland. In recent years, local food production and marketing capability in West Cork has grown rapidly. This has been driven by a number of factors not least burgeoning domestic demand as well as the development opportunities afforded by the Fuchsia Brand. The latter has been the subject of considerable acclaim and has been instrumental in building a regional proposition, linking production to market opportunities and positioning the region as Ireland's foremost food destination. The emergence of direct selling in recent years including farmer's markets has been a boon to the region, allowing the producer direct consumer feedback on produce and price. The markets play a vital role in educating consumers as to the production and origin of their food and further help reduce food miles and fossil fuel use and also encourage more environmental production practices and farm diversification.

Needs Arising

Success in the food sector will require a deep understanding of consumer needs and behaviour and a significant investment in developing products that meet the needs of to-days consumer. Food production in the region will stimulate local economic development by sustaining and increasing employment and in re-inforcing linkages to the local agricultural and marine sector for raw material inputs. The commercial environment in which the sector operates is hugely competitive and challenges facing the sector include costs and efficiencies, innovation and new product development as well as developing new and efficient routes to market. Given that these enterprises are predominantly rurally based, they often have problems accessing markets, particularly non–local, urban and export. Based on successes to date it is evident that the Fuchsia brand can assist local producers develop and access markets both locally and further afield. In order to achieve sustainable market returns, proactive and efficient practices are required by all present in the chain from production right through to market. In order to promote sustainable development and to continue to leverage its comparative advantage, improved supply chain coordination among producers, farmers, processors and retailers by strengthening economic relationships and by intensifying communication will be required.

3.15. Fisheries

Fishing and aquaculture are important industries in the economic make-up and future of the area, representing about 15% by value of the national wild fish landings and about 20% of aquaculture production. Source: BIM/ SFPA (2008) Apart from inshore and offshore fishing, the industry includes processing, aquaculture, ancillary sectors and support services (packing, transportation, marketing, equipment manufacture and maintenance). It is estimated that the fishing industry provides direct employment to 600 people in West Cork.

There are 6 principal fishing ports in the region, the largest port in West Cork and the second most important in the state is Castletownbere, located in the extreme west of the area. Aside from these ports additional commercial catches are recorded in Courtmacsherry, Ring, Glengarriff, Dunmanus Bay, Ardgroom, Crookhaven and Castletownshend. Bord Iascaigh Mhara (BIM) operates a training facility for the industry in Castletownbere. This delivers a wide range of programmes and courses in proficiency, safety, handling and conservation. The industry in the region has also been pro-active in piloting and implementing quality control and conservation measures. The attributed tonnage and commercial values by port are outlined in Table 3.12.

Table 3.12: Tonnage and Commercial Values by Port

LOCATION	LIVE WEIGHT TONNAGE	VALUE OF SEAFISH LANDINGS €m
Baltimore	1883	2.34m
Bantry	3010	2.92m
Castletownbere	6876	9.68m
Kinsale	1638	3.08m
Schull	762	1.77m
Union Hall	1548	4.36m
Total	15717	21.15m

Source: SFPA (2006)

Most of the ports are located in areas where factors such as distance from main economic centres, sparse population and poor agricultural land combine to reduce employment opportunities. The income from part-time employment in fishing, processing and aquaculture makes an essential contribution to livelihood where alternative incomes may be insufficient or seasonal in nature. In addition to the finfish sector, aquaculture (abalone, clam, mussels, salmon, trout, seaweed, oysters, etc) is a significant activity and provides inputs to support manufacturing in some peripheral locations, particularly on the Beara and Sheep's Head peninsulas.

Needs Arising

While consumer demand for seafood is growing, the industry is facing significant difficulties in the short term. This is due to a variety of factors including the decline in fish stocks, reduced species quotas, imports, fleet decommissioning, structural imbalances at primary and processing level, a 50% per cent rise in fuel prices (fuel accounts for more than 60 per cent of a boat's gross earnings), and recent moves to ban drift netting of salmon. In addition peripherality, poor road and other infrastructure adds considerably to the cost of placing produce on the market. The industry needs to address a range of policy, structural, market and relationship related challenges all of which are critical. The long term sustainability and development of the seafood industry requires a more integrated approach on the part of stake holders along the value chain, with a greater focus on deriving maximum value for its fish, adopting more responsible fishing/farming practices, whilst safeguarding the environment and resource base. Profitability, competitiveness and sustainability must be the key drivers of the Irish seafood industry. Significant upgrading of the whitefish fleet, particularly in Castletownbere, Kinsale and Union Hall has taken place in recent times and to some extent fleet modernisation will help to mitigate some of the challenges facing the industry. Investments have also been made in port infrastructure and in primary processing facilities on shore. Increased output, traceability and higher value added production is required from the secondary processing sector. The comparative small scale of most enterprises, however, remains an issue in terms of market access and development.

The continuity of the supply of quality raw material is largely dependent on the capability of the offshore fleet to operate in waters distant from home ports and in all weather conditions. Quota restrictions, fuel costs, imports and conservation measures remain a limiting factor. However, there remain significant opportunities to be realised among non-quota species and in aquaculture, which is not subject to production quotas. Recent decisions from the European Commission on the conservation of fish stocks are seen as likely to impact negatively on existing quotas and on support measures for the industry.

3.16. Public & Private Services

The West Cork region contains variable levels of services sector development. In recent times, the strongest level of employment growth has been in private sector services and in commerce and retail adjacent to urban settlements. The services sector has been a major source of employment growth, which for the most part, has been fuelled by the economic growth, inward migration, increased disposable income, consumer spending and demographic changes. In this respect, population growth and the comparatively high levels of household income in the region's larger towns has been a key growth driver in local private sector service employment. In particular, the region's economic infrastructure has benefited from an increase in the provision of a broad range of professional services, including emerging knowledge based disciplines such as environmental, energy, building systems and information and communication technologies.

Growth in the internationally traded services sectors has been notable, and the increase in the number of consultancies and specialist professional services in a wide range of disciplines operating from the region suggests considerable further potential in this sector. Furthermore, the West Cork Technology Park can and will continue to accommodate a diverse range of activities including software development, ISP/ASP's, shared services, business process outsourcing, media, technical support, wealth management and research and development. All these disciplines represent key elements of a knowledge based economy. Future growth in this sector, in particular in stimulating indigenous enterprise creation is anticipated and will be critical to diversifying the region's economic base. The West Cork Technology Park in Clonakilty, which currently accounts for in excess of 1000 jobs, is one of the few locations being marketed for IDA backed FDI activity in the West Cork region.

The Government decentralisation programme announced in 2003, committed the relocation of some functions from the Department of Agriculture, Fisheries and Food to locations in Clonakilty (80 posts/80 positions filled) and Macroom (100 posts/0 positions filled). This has been supplemented by the location of the Sea Fisheries Protection Agency (47 posts/22 positions filled) and the proposed relocation of the head office of Bord Iascaigh Mara to Clonakilty (95 posts/0 positions filled). Table 3.13 denotes the key public services available in the West Cork region.

Table 3.13: Public Services in West Cork

Public Services	No.
Head Post Offices	3
District P.O.s	3
Post Offices	55
Garda Stations	30
District Courts	1
Secondary schools	20
Primary Schools (of which 4 are Gaelscoileanna)	83
Hospitals – General	1
Community	8
Health Centres	16
Social Welfare Offices	7
Public Libraries	9
CIS Libraries	2
FÁS Employment Services Offices	1

Table 3.14: Private Services in West Cork

Private Services	No.
Bank Branches	29
Credit Unions	7
Accountant's Offices	68
Dairy Co-ops	4
Branch outlets	21
Playschools/childminders (reg.)	72
Doctors (G.P.)	46

The public services provided, in particular schools, post offices, retail and health care, are critical to the viability of rural communities. The future of a range of public sector services is threatened by a range of factors including rationalisation, alternative means of delivery, labour shortages and budgetary constraints, increased mobility and changing demographics. Since 2000, there has been a notable decrease in some public services, most notably rural post offices which declined by 35% in the period from 2000-2008.

Needs Arising

Aside from professional services however, service sector employment in retail and tourism can be poorly paid, low skilled, part-time/seasonal, unregulated and with limited opportunities for career progression. Provision of and access to appropriate vocational training remains a key priority in addressing these issues. Skills training and the development of specialised or knowledge intensive activities based on local resource potential remains a key priority for services sector development. The viability of some local services, particularly in areas dependent on tourism can also undermined by seasonal fluctuations in demand. Quite apart from their contribution to local employment, the provision of a good range of services will assist rural communities sustain and thrive. A broad based and efficient services sector will also be critical in attracting new commercial investment to the region; vital factors in ensuring the viability of local communities, existing businesses and in the active management and care of the countryside. Conversely, poor service infrastructure, whether public or private, undermines rural viability, social fabric and family networks with adverse effects on the economic and social well-being of rural communities.

3.17. Manufacturing

Manufacturing accounts for 16% of the region's employment, a proportion which has declined slightly over the last decade. In order to assess the economic value of the sector, it is worth distinguishing between the nature and scale of local manufacturing activity. Small and Medium size (SME's) and micro-enterprises comprise the greater proportion of local manufacturing activity. The key components of the region's manufacturing base are pharmaceuticals (including life sciences and biotechnology), food processing, textiles/clothing, furniture/timber processing, craft, plastics, light engineering, medical devices as well as building systems & materials. The region's prime natural resources as well as the ready availability of development supports from the IDA, Enterprise Ireland, the South & West Cork Enterprise Boards and the LEADER programme has allowed a number of SME's to take advantage of commercial opportunities in value added processing on both domestic and overseas markets.

The greatest concentration of non agri-related manufacturing activity tends to be found in towns adjacent to the CASP region. Towns such as Bandon, Kinsale, and Macroom, although drawing considerable employment from Cork, also provide considerable local employment opportunities and as well as important linkages to local services. The higher value manufacturing activity in pharmaceuticals, biotechnology and medical devices predominate in these areas, clearly demonstrating that infrastructure, skills availability, links to third and fourth level institutions and access to markets are key determinants in supporting high value skilled manufacturing activity. Conversely, the greater the distance from the CASP region however, the lower the incidence and concentration of manufacturing activity. The towns of Clonakilty, Skibbereen, Bantry, Castletownbere, and Dunmanway all support some degree of manufacturing activity. In addition, the presence of manufacturing firms in villages such as Ballineen, Ballinadee, Enniskeane, Drimoleague, Kilbrittain, Drinagh and Durrus, accounts for a higher than average level of manufacturing employment in remoter locations.

Inward investment supported by the IDA to the region is comparatively modest. Again the greater proportion of this investment favours eastern locations, Significant investments have been made in Lilly (Kinsale), Schering Plough Brinny Co. (Innishannon), Premiere Conferencing (Clonakilty), Rowa, (Bantry) and Donovan Medical Equipment (Macroom).

Needs Arising

In all, approximately 50% of local manufacturing firms are involved in food, fish and agri-related activities with these firms forming the core of the manufacturing base in remoter rural locations. However rationalisation within the retail sector, distance from national and international markets, the advent of central billing/distribution as well as the discipline and challenges involved in servicing export markets, while prompting new product development and investment in improved plant and processes, is expected to impact on a significant number of smaller firms in the region. Additional pressures on the indigenous manufacturing sector will come in the form of skills shortages, access to markets, adoption of new technologies, moderation of economic growth, reduced consumer spending, limited innovation capability, poor R&D investment as well as contractions and limitations on agriculture and fisheries output. Manufacturing enterprises must also take account of environmental and sustainable practices and issues in production and marketing, not alone to achieve cost and production efficiencies but also to develop a competitive position in the marketplace. Future growth will also be predicated on productivity and efficiency gains. A greater spatial distribution of manufacturing activity can also be realised through the development of appropriate workspace in selected locations particularly those identified by Cork County Council as ”Specialised”, “Integrated” or local employment centres. Agglomeration or the thematic clustering of activities remains a priority in order to ensure that the necessary linkages, efficiencies, critical mass and competencies can be achieved.

3.18. Craft Sector

West Cork has a long established reputation for excellent craft which is complemented by the region’s identity as represented by the Fuchsia Brand and as such use of regional identity can complement individual and group marketing both within the area and in more distant markets. The LEADER programme’s rationale for working with this sector has always been about the broader benefits that can accrue to the region. Whilst direct impact through jobs and increased turnover will be low in absolute terms, the sector has a disproportionately high contribution to the area in terms of tourism appeal, visual cues, creative reputation and local identity.

There are currently 83 craft makers in West Cork registered with the Crafts Council of Ireland of whom 32 are accredited to the Fuchsia brand. Most of the enterprises are single person operations and are spread fairly evenly across the region. The craft enterprises are involved in a range of disciplines but ceramics and jewellery are particularly strong. At an agency level the Crafts Council of Ireland offer a suite of services nationally and have a number of different strategies for makers according to market category – the emphasis is on export to the US and UK and high end collectors markets. The CCOI also has a design brief and focuses on contemporary design in this regard. West Cork Enterprise Board is also very active in supporting the development of the sector and delivers both capital and training supports. In particular, the Board runs a year long programme for enterprise that encompasses business, market and product development. Cork County Council through the Office of Community is also active in supporting the development of the sector across the county through raising profile and strengthening networking. It has been working with Cork Art and Design in this regard.

Needs Arising

The primary need arising for craft makers is improved access to local retail. Competition for retail space from cheaper imports has made it extremely difficult for craft makers to remain visible locally. Although tourists may be interested in buying local craft it is not always easy to find many of the products for sale in West Cork. Furthermore, if tourists are to enjoy craft buying and craft courses as part of their stay in the area there needs to greater awareness and linkages from their initial point of contact, i.e. tourism providers.

Skills development is an ongoing requirement. Most of the makers have limited business skills, particularly in the start-up situation or when looking to access overseas markets. Their motivation at start-up is often closely linked to a creative ambition rather than a business one. In spite of having strong design skills, craft makers frequently undersell their products with poor presentation and marketing. Design and innovation are very important to the majority of craft buyers and there is a strong correlation with the fashion industry in this regard. As a result there is a constant need for makers to develop new products, improve their skills and remain alert to new design trends.

3.19. Information & Communications Technology

In recent years ICT has emerged as a sector in its own right and in a West Cork context represents the most credible attempt to broaden the economic base of the region. The strong economic growth within the Irish economy correlates closely with significant success on the part of the IDA in attracting industry leaders in software, pharmachem and technology. While West Cork has profited to a limited degree from a shift in IDA policy designed to achieve a greater balance in the dispersal of investment to the regions, the area has impressively marshalled its key resources to attract overseas technology investment. These resources include good telecommunications infrastructure, exceptional quality of life factors as well as access to a skilled labour pool. The West Cork region hosts a variety of small enterprises engaged in web development and design, media, multimedia, IT project management, technical writing, translation, computer training, custom software development and e-commerce. As many of the principals involved in these enterprises are self-starters who have located to West Cork for quality of life issues and to achieve an appropriate work/life balance, there is a notable spatial distribution of these enterprises throughout the region.

The development of the West Cork Technology Park illustrates the success of the strategy for technology sector and internationally traded services growth initiated and supported by the by the West Cork LEADER Co-op on a collaborative basis with public and private sector partners over the last decade. The park currently comprises 35,576 m² of high specification office accommodation, (with the potential for the development of an additional 54,864 m²), all of which is fully let at present. Plans are afoot by the developers and tenants alike to further expand facilities and operations. Potential also exists to develop satellite locations in West Cork to facilitate remote working, telecommuting and outsourced functions. The West Cork Technology Park is the prime focus for ICT investment in the West Cork region and has been extremely successful in leveraging the development of key infrastructure such as broadband to the region.

Needs Arising

Notwithstanding the significant increase in technology skills and capabilities in local services and manufacturing concerns, one of the critical issues for the region will be how best to utilise the infrastructure and profile of the West Cork Technology Park and its tenant companies as well as the region's resources and competitive advantages in developing indigenous ICT capability. In order to further leverage advantage and capacity from the use of information and communication technologies, not least in developing knowledge intensive activities to compete on international markets, broadband deficiencies and inadequacies within the region will need to be addressed. Allied to infrastructural needs, it will be imperative to develop new practices and efficiencies, skills and competencies, new business models, structures and markets as well as e-commerce functionality and capability. Effectively harnessed and targeted this can offset issues of peripherality and reduce market isolation. In general terms, effective and efficient ICT usage predominates within larger enterprises. A significant cohort of local enterprises will however face challenges and require development supports in order to employ information and communication technologies for optimal commercial effect.

3.20. Tourism

The West Cork area is situated within one of the country's prime tourism destinations, the Cork/Kerry region, which attracted 3.6 million visitors in 2006, with a revenue spend of €1.2 billion. This represents an increase of 11% per annum since 2001. The total number of visitor bed nights is estimated at 19.5 million, with overseas visitors accounting for 2 in every 3. Overseas visitors spent €887 million with a further €340 million spent by domestic visitors, who make up 41% of the market. The British market continues to be very important, accounting for 22% of holiday visitors. Overseas tourists to County Cork totalled 1.4 million in 2006 (compared to 1.04 million in Kerry), generating revenue of €638 million. Source: Fáilte Ireland (2006). Trips to this region also had the longest average length of stay at 4.1 nights, compared to a national average of 3.5 nights. Source: CSO – Domestic Tourism in Ireland 2000-2005.

There has been an increase in the percentage of overseas tourists holidaying in the off-season. Airlines operating into Ireland have contributed to a better seasonal spread by raising the proportionate level of winter capacity into Ireland from North America and Europe. Another contributory factor has been strong promotion to key target groups (particularly over 55's). Near markets are the most easily persuaded to take off-peak holidays. Source: Fitzpatrick Associates Economic Consultants 2006. Changing demographics, life styles and customer expectation continue to impact travel decisions and behavior patterns. People are now taking more frequent and shorter trips. They are more travel "savvy" and value conscious and are looking for more fulfilling experiences. The use of the internet is increasingly been used as the main method for booking holidays or for research purposes through web 2.0 user generated content (e.g. www.tripadvisor.com, blogging, etc).

The appeal of the South West region is based primarily on the rugged landscape, coastline, environmental quality and its attractive towns and villages. According to a regional survey undertaken by Fáilte Ireland in 2006, "friendly, hospitable people" was rated highly as a factor in considering the South West for a holiday. Over 80% of the respondents also mentioned the beautiful scenery, natural unspoilt environment and natural attractions as very important. The satisfaction ratings for nature/wildlife/flora, interesting history/culture, suitability for touring and safe and secure destination were notably high.

Overall in the South West, Hotel and Guesthouse/B&B stays were the most popular in 2006 (both at 30%). The Visiting Friends/Relatives category (VFR) was the next most popular at 21%. The British and North American market favoured hotels while Mainland Europe markets had a preference for Guesthouse/B&B or self-catering accommodation. Source: Fáilte Ireland Regions South West 2006. Second home ownership has an influence on visitor numbers and tourism spend. Accommodation occupancy rates are a good indication of the health of a regions tourism business. For the South West in 2006, hotel room occupancy stood at 67%, the highest outside Dublin (Source: Clonakilty Chamber of Tourism).

Tourism Ireland predicts that there will be a 2% increase in visitors and 7% increase in holidaymakers to the South West region for the 2008 season.

Because of the difficulties in dis-aggregating statistics for West Cork specifically, much of the information available is based on the South West region as a whole.

In 2006 in West Cork domestic tourism represented the single largest group of visitors (39% of the total with the highest percentage from County Cork, reflecting the popularity of West Cork for recreational and short breaks). 18% of visitors stayed for 1 night, compared to only 8% of those who stayed more than a week. 21% of all visitors were from Britain (down from 23% in 2005). Visitors from Britain are more likely to visit in the high season, while those from North America mostly arrive in the Spring and Autumn months. Those staying in B & B's, guest houses and hotels stayed about 4 nights, compared to 5 and 6 days in a camping or caravan site, 3 nights in a hotel and 6-7 nights in self-catering.

West Cork enjoys a high recognition factor in domestic and overseas markets and benefits from direct air and sea access from lucrative British and Continental markets. Cork Airport, which is adjacent to the region is of critical importance to the local tourism industry, welcomed new routes and services during 2007. The airport also represents a shop window for West Cork with the ready availability of tourism information and the widespread availability of Fuchsia Branded food products and craft items at the "Travel Value" shop.

The visitor capacity to the region can be quantified by an assessment of the approved accommodation base. This demonstrates that the region has a critical mass of accommodation (as well as associated ancillary support activities). The Defert Index which measures the relative intensity of tourism in different locations reveals that the towns and hinterlands of Kinsale, Clonakilty and Bantry have a significant critical mass and reliance on tourism activity. Hotels in particular have been the subject of considerable investment and upgrading, however, one consequence of this has been the decline in the viability of Bed & Breakfast accommodation throughout the region.

Table 3.15: Accommodation available in West Cork

Product	No. of Establishments	Capacity
Hotels	25	1134 rooms
Guesthouses	13	134 rooms
Bed & Breakfast	176	716 rooms
Caravan & Camping	9	356 pitches
Hostels	11	110 rooms
Self Catering	370 units	1170 rooms
Total	604	3520

Source: Fáilte Ireland Hotel & Guesthouse Guide, Caravan & Camping Guide and Self-Catering Holiday Homes Guidebook, 2008.

Emerging trends and the increased sophistication of international tourism favour the product base currently being developed in West Cork, with increasing demands for environmental quality and a growing preference for natural resource type activities and amenities. In recent years West Cork has seen a considerable investment in new accommodation in all categories, and to a lesser degree in amenities and facilities of scale. The spatial distribution of this investment, allied to the region's prime fee paying visitor attractions at Garnish Island, Bantry House, Mizen Vision, Model Railway Village and Charles Fort confirm the special appeal of the coastline for tourists. A measure of the enduring popularity of tourism in West Cork is the high levels of satisfaction ratings for product quality, service quality, efficiency, friendliness, food, hygiene and value for money. Source: Fuchsia Brands Consumer Response Card Survey 1999-2006.

In 2008, A Marine Leisure Infrastructure Strategy for the Western Division of Cork County Council was published, in partnership with Coastal and Marine Resource Centre (UCC), Fáilte Ireland, Department of Agriculture, Fisheries and Food and the Marine Institute. Their key objectives will be: the rejuvenation of existing facilities, creating opportunities for new development and the promotion of the marine leisure product in West Cork. (Source: Cork County Council 2008).

Following the re-structuring of regional tourism nationally, Fáilte Ireland South West is charged with delivering increased tourism benefits to the counties of Cork and Kerry. It has, in conjunction with stakeholders in the region, prepared the South West Tourism Development Plan 2008-2010. The plan is intended to provide a road map so that all the key players from both the public and private sectors can most effectively contribute to the further development of sustainable and economically beneficial tourism in the region. Identified in the plan are a number of adventure hubs in the South West, Bantry and its hinterland being one of these in West Cork. This will become a key strategic objective with public and private sector stakeholders seeking to develop critical mass in the adventure/activity market. (Source: Fáilte Ireland South West). Fáilte Ireland and Research Solutions completed Adventure Holiday Research in July 2007 and some of the findings revealed that there is a growing need for holidays with more "substance" (things to do), a desire to go "off the beaten track" to achieve personal individual experience of an area and a growing passion for adventure activity such as walking, cycling, surfing, etc.

Whilst the direct employment in tourism is comparatively modest, its significant regional distributive effect has led to the creation of employment and the maintenance of rural populations where few alternative opportunities have existed. Economically, socially and environmentally, tourism represents a good strategic fit for the expansion of economic activity in the region, with benefits generally accruing to small owner managed enterprises.

In addition the strong multiplier effect of tourism creates significant opportunities for complementary sectors such as food, retail, services and craft. Synergies between these sectors and their influence on regional identity and character now form the basis for local tourism development and marketing. The West Cork Fuchsia Brand has become an invaluable development tool in this respect, particularly given its emphasis on promoting product and service excellence and the development of inter-sectoral synergies. Failte Ireland South West has identified the Fuchsia Brand as an invaluable tool in this regard. It is widely recognized that the Fuchsia Brand has been significant in promoting and maintaining high quality standards through its Tourism Training Programme in conjunction with Fáilte Ireland.

Other training initiatives which are embedded within the region are the National Tourism Learning Network (MERGO) and the Optimus programme which focuses on service quality and cost efficiency. Networking and collective action has been a strong feature in West Cork and has made a notable contribution in terms of tourism development.

Needs Arising

Quite clearly the region possesses the undoubted potential, visitor appeal and the resources to increase tourism numbers, yields and revenues. This fact was acknowledged when Clonakilty and District (including Rosscarbery, Timoleague and Courtmacsherry) was awarded the title of European Destinations of Excellence - Best Emerging Rural Tourism Destination 2007. There are, however, a number of inhibiting factors to tourism development in the region. Chief amongst these is seasonality which militates against the viability of businesses, new investment and the creation and maintenance of employment. Currently tourism demand within the region is heavily concentrated within an eight week period, July-August. In addition, further growth is restricted by labour shortages, flight access and schedules, limited niche market development, fragmented marketing, increased competition from emerging locations as well as the relatively long travel distance from the eastern conurbation which has traditionally restricted the development of lucrative off-peak weekend business. The continued growth in short breaks and the demand for urban holidays will make achieving a regional distribution of visitors challenging. Undoubtedly the recent investments in product development and marketing (through Fáilte Ireland, LEADER, Fuchsia Brands and other voluntary tourism bodies in West Cork such as West Cork Tourism, the Chambers of Tourism, etc,) have been critical in maintaining the appeal and competitiveness of the region. However, greater levels of effectiveness must be achieved in managing tourism demand, both in terms of numbers and timing, in an effort to reduce the considerable seasonal pressures that some local destinations experience. In addition, tourism enterprises must adapt to the demands of the emerging environmental and sustainability agenda. This relates to product development and service provision on one hand but also market positioning and consumer demand on the other.

Access has been an ongoing issue for the West Cork region due to its peripheral location. More recently, the loss of the Cork Swansea ferry has been a huge blow. The ferry, first launched in May 1969, ceased operations on 7th October, 2006. An average of 100,000 passengers, 30,000 cars and between 6,000 and 8,000 freight units used the ferry during its March to October season each year. It is estimated that the loss is costing the region €37 million a year. Businesses claim figures are down 50% and that the traditional tourist season has been cut from 7 to 3 months. Source: Evening Echo, 6th May, 2008. Brittany Ferries, who have a fleet of 8 ships, accounts for over 50% of the traffic on the Western Channel, carrying in excess of 2.6 million passengers, 780,000 cars and 170,000 lorries a year. There are weekly sailings from Roscoff to Cork from the end of May to the end of October. The provision of passenger and car ferry services is particularly important in catering for visitors bringing their own car and these visitors have a tendency to stay longer, engage in tourism activities and tend to travel more so are especially important in terms of tourism development outside the major tourist areas.

Additional needs are good quality tourism information, including signage, and the requirement to employ new technologies in the provision of tourism information (GPS, downloads to mobile, web 2.0, Google mapping, etc.).

> *"In tourism, the main perceived weakness is in soft supports. There is at present relatively little support for tourism enterprises geared towards business advice, innovation and management development. The recently published report of the TPRG (Tourism Product Review Group) makes a number of relevant proposals in this regard. There is also extensive evidence of the success of clustering in tourism and there is potential in the study area for a limited number of new tourism clusters of scale".*
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> Source: Fitzpatrick Associates – Review of Enterprise Support in Rural Areas 2004.