



# CORK AND THE BREXIT EFFECT

---

Edited by  
Mary C. Murphy  
University College Cork





“

**“There are certainly future challenges here [related to Brexit], compounded by the associated uncertainties, however there is also opportunity and the Cork business community is reporting strong future estimates characteristic of the entrepreneurial strength of Cork businesses.”**

Cork Chamber, 3 October 2017



”

**“There is very significant support, in practice, for an all-island approach to key economic, social, environmental, and wellbeing challenges.”**

National Economic and Social Council (NESC) (2022) Shared Island: Shared Opportunity, p. ix.



“

**“The all-island economy provides a key growth dynamic for indigenous SMEs, as well as supply chain, clustering and talent pool opportunities, which should be fully harnessed for the economic benefit of both jurisdictions.”**

Government of Ireland (2022) Trade and Investment Strategy 2022-2026: Value for Ireland, Values for the World, p. 18

# TABLE OF CONTENTS

<b>1</b>	<b>Introduction</b>	<b>4</b>
<b>2</b>	<b>The Impact of Brexit on Cork</b> Mary C. Murphy, University College Cork	<b>6</b>
<b>3</b>	<b>An All-Island Economy, the Protocol and Brexit: What does it all mean for Cork?</b> Michael D'Arcy, Senior Research Associate, Centre for Cross Border Studies	<b>11</b>
<b>4</b>	<b>Brexit and the All-Island Challenges and Opportunities facing the Economic Ecosystem of the South West</b> Cork Chamber of Commerce	<b>16</b>
<b>5</b>	<b>The Case of Brexit Preparation among Major Irish Food Companies: Facilitating Positive Adaptation</b> - Michelle Carr, Cork University Business School (CUBS), University College Cork	<b>19</b>
<b>6</b>	<b>Cork, Brexit and the All-Island Cultural Economy</b> Fiona Kearney, Glucksman Gallery	<b>22</b>
<b>7</b>	<b>Cork's Involvement in the All-Island Higher Education Sector</b> Paul O'Donovan, University College Cork	<b>24</b>
<b>8</b>	<b>Rethinking Relationships: Cork and Wales</b> Jonathan Evershed, University College Dublin	<b>27</b>
<b>9</b>	<b>Recommendations and Next Steps</b>	<b>29</b>

The European Commission's support for the production of this publication does not constitute an endorsement of the contents, which reflect the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.



# INTRODUCTION

---

The UK vote to leave the EU on 23 June 2016 represented a considerable shock to the international community. No EU member-state however, stood to be more profoundly impacted by the Brexit vote than Ireland. Given its close physical proximity, strong trade relations and intertwined political, social and cultural links with the UK, Ireland is more directly and intensely affected by Brexit and its fallout than any other EU member state.

Brexit's impact on Ireland galvanised around its implications for British-Irish trade and for the potential negative impact on the Northern Ireland peace process. There is an important interplay between economic growth, and peace and stability, on the island of Ireland which is underpinned by the Belfast/Good Friday Agreement. Protecting and sustaining both economic growth and the 1998 Agreement represents a means of strategically supporting the consolidation of peace and stability.

The material effects of Brexit stretch beyond Northern Ireland and the border region and have had a differentiated regional impact across different parts of Ireland. This report seeks to identify how Cork - Ireland's largest county and second largest city - has managed and mediated the challenges and opportunities posed by Brexit. It provides a brief snapshot of how specific sectors in and around Cork have been impacted by Brexit and details the extent to which all-island economic, social and cultural opportunities, in the aftermath of Brexit, are being developed and advanced.

# PROJECT OVERVIEW

- ✔ On 15 February 2022, UCC organised a moderated Brexit Briefing Workshop to engage with local business and civic leaders in Cork. The workshop focused on experiences of Brexit to date; perspectives on, and engagement with, the all-island economy; and, broader future related strategic opportunities for the Cork region.
- ✔ The workshop was attended by representatives from Cork Chamber, local business, the tourism sector, education, and arts and culture, and was moderated by Michael D’Arcy (Senior Research Associate, Centre for Cross Border Studies).
- ✔ This report captures the content and spirit of that meeting and is based on additional research and inputs from different contributors and sectors.
- ✔ The report seeks to highlight the opportunities and challenges related to developing Cork/Munster’s place, role and participation in a ‘Shared Island’ and is based on future orientated views, expectations and ambitions for Cork and for the all-island economy after Brexit.





# THE IMPACT OF BREXIT ON CORK

Mary C. Murphy, Jean Monnet Chair in European Integration, University College Cork

---

## THE BREXIT CONTEXT

On 23rd June 2016, the UK voted to leave the European Union (EU). The Irish government's response to the Leave vote was immediate, robust and comprehensive. The key priorities for the Irish state were established early and included:

- 
- ✓ **Protecting the Irish economy from Brexit-related disruption;**
  - ✓ **Preserving the Common Travel Area (CTA) and the strong relationship between the UK and Ireland;**
  - ✓ **Securing the Belfast/Good Friday Agreement and the peace process;**
  - ✓ **Maintaining a strong UK-Irish partnership in Brussels to aid the renewal of the EU.**
-

Just one day after the referendum, on 24 June 2016, the Irish government published an initial Brexit contingency framework<sup>1</sup>. It included a list of key actions and immediate priorities for Ireland; and it required the creation of new and revised administrative and diplomatic structures. This included additional staff for Enterprise Ireland and the IDA and the provision of financial supports to assist Irish businesses in adjusting to a new trading environment. The government also rolled out a process of widespread consultation and communication with key sectoral interest groups and civil society through the creation of the All-Island Civic Dialogue.

The process of the UK exiting the EU was protracted, complex and often mired in controversy. Agreement on the terms of UK withdrawal from the EU are set out in the Withdrawal Agreement agreed in October 2019. This agreement contains the Ireland/Northern Ireland Protocol (the Protocol) which was negotiated in the context of Brexit posing ‘a significant and unique challenge to the island of Ireland’.<sup>2</sup>

Having an ‘open border’ between Northern Ireland and the Republic of Ireland, which allows goods to continue to move freely across the land border, came to be understood during the negotiations as necessary to meet the challenge of protecting peace, as underpinned by the Belfast/Good Friday Agreement, which

in turn enables unprecedented levels of North/South cooperation and the on-going development of an all-island economy. The Protocol applies to goods moving between GB and Northern Ireland and means that necessary inspections and document checks (to ensure compliance with EU law) take place at ports and airports rather than at the land border. In addition, the Protocol includes the protection of human, social and economic rights, and the conditions for North/South and East/West cooperation. However, these aspects of the Protocol have received limited to no political, media or public attention to date.

Following agreement on the terms of withdrawal, the UK formally left the EU on 31 January 2020. The Trade and Cooperation Agreement (TCA) which sets out the terms of the future UK relationship with the EU was agreed on 24 December 2020. It establishes a no tariff, no quota free trade arrangement between the UK and the EU. This forms the basis for the conduct of trade between the UK and EU member states. The transition period (during which the UK remained part of the EU single market and customs union, and EU law continued to apply) ended on 31 December 2020.

<sup>1</sup> The full contingency plan is available at: <http://cdn.thejournal.ie/media/2016/06/contingency-framework-summary.pdf>.

<sup>2</sup> Contained in the Recitals to the Protocol on Ireland/Northern Ireland available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:12020W/TXT&from=EN>.



## A PROFILE OF CORK



### ECONOMY

Cork is a key driver of the national and regional economy and contributes 19% of Ireland's GDP. The city also generates the highest revenue per person in Ireland (€105,000) ahead of both Dublin (€96,000) and London (€104,000).<sup>3</sup>



### EDUCATION

Over 36,000 students are enrolled in third level academic institutions in Cork including University College Cork (UCC) and Munster Technological University (MTU).



### LARGE COMPANY BASE

Many of the world's largest companies are located within the Cork City region which is home to global market leaders in pharmaceuticals, healthcare, ICT, biotechnology, professional services and international financial services.



### CULTURAL HUB

Cork is designated as a UNESCO Learning City; has an established arts and cultural scene and a lively festival tradition; and is well-known as the Food Capital of Ireland.



### FOREIGN OWNED COMPANIES

There are approximately 39,000 people working in 169 foreign owned companies based in the Cork region.<sup>4</sup>



### TRAVEL CONNECTIVITY

Cork is served by the Port of Cork and Cork International Airport which both provide a gateway to the South of Ireland.



### EMPLOYMENT IN RETAIL

Retail is the second largest employment sector in Cork City, employing over 10,000 people.



### TOURIST DESTINATION

Over 2.7million domestic and overseas tourists spent €833million in the Cork region in 2017.

<sup>3</sup> Cork City Council (2021) Q3 Economic Profile: Cork City, County & Southwest Region, available at: <https://www.corkcity.ie/en/doing-business-in-cork/cork-city-council-economic-profile-2021-.pdf>

<sup>4</sup> Cork City Council (2020) Cork City Development Plan 2022-2028: Pre-Plan Consultation Issues Paper, available at: <https://consult.corkcity.ie/ga/consultation/cork-city-development-plan-2022-2028-stage-1-pre-plan-consultation-issues-paper/chapter/7-diverse-economy#:~:text=Cork%20is%20a%20key%20driver,based%20in%20the%20Cork%20region>

<sup>5</sup> Ibid.

<sup>6</sup> Ibid.





## CORK AND THE BREXIT EFFECT

Brexit brought uncertainty to the island of Ireland. Much of that uncertainty was concentrated in Northern Ireland and across the border region. These parts of Ireland faced particularly significant challenges including concerns about the future status of the border; the impact on cross-border trade; the loss of EU financial assistance; and the risk of destabilising the peace process.

For other parts of Ireland, the Brexit context was different. In an early study of the possible implications of Brexit, the Economic and Social Research Institute (ESRI) identified the potential for a regionally differentiated and sectorally specific impact.

**The particular concentration of merchandise trade in particular sectors might...result in regionally differentiated impacts of Brexit...the Chemicals and Pharmaceuticals sector is more important in South Dublin, Wicklow, Cork, Waterford and Roscommon.<sup>7</sup>**

A later study of the impact of Brexit on employment identified the industries most seriously impacted and calculated how many employees were affected:

**Approximately 109,000 persons employed in the South [West Cork and Kerry] region in quarter 4 2019 were in sectors considered to be either severely or moderately affected by Brexit, accounting for 32% of employment for the region (compared to a share of 34% nationally).<sup>8</sup>**

The sectors in the South West region which bore the brunt of the fallout from Brexit included: agriculture, finance and industry.

Cork's long history of trade with Europe<sup>9</sup> has helped to cushion the worst effects of Brexit for the city and the wider region. Cork's physical proximity to the European continent has facilitated a strong European focused and facing economic and trading outlook, and particularly so in relation to clusters in pharma/bio tech, life sciences, marine, energy, food and drink, agriculture/forestry/fishing, ICT, education and more recently, financial services. This developed economic base and outlook has been key to helping Cork and the wider region to meet the challenges posed by Brexit.

Where these clusters have been resilient in meeting challenges, other sectors have been more exposed to its fallout. In the first two years after the UK vote to leave the EU, Brexit impacted significantly on tourism. This was linked to a shift in the Sterling/Euro exchange rate and it was exacerbated by the covid-19 pandemic. As Ireland's competitiveness and value for money ratings have declined, visits to the Republic of Ireland from Britain and Northern Ireland fell, although the Cork region was comparatively less affected by shifting tourist numbers than other parts of Ireland:

7 A. Barrett, A. Bergin, J. FitzGerald, D. Lambert, D. McCoy, E. Morgenroth, I. Siedschlag and Z. Studnicka (2015) Scoping the Possible Economic Implications of Brexit on Ireland, Research Series No. 48, Dublin: ESRI, p. 13-14, available at: <https://www.esri.ie/system/files?file=media/file-uploads/2015-11/RS48.pdf>.  
 8 J. McNaboe, D. Coates, J. Dwan O'Reilly, C. Shally, A. Brioscú, N. Condon, R. Geary, and A. Murphy (2021) An Examination of the Employment Exposures to Brexit. Published by the Department of Social Protection in collaboration with SOLAS, available at: <https://www.solas.ie/f/70398/x/87115a89f3/an-examination-of-the-employment-exposures-to-brexit.pdf>  
 9 An early reference to trading links between Cork and Europe is contained in: J.L. Fawcitt (1917) 'New Industries for a Greater Cork', Studies: An Irish Quarterly Review, Vol. 6, No. 23, pp. 462-469.

**Tourism in the South West [Cork and Kerry] region however, was resilient in the face of Brexit. Between 2016 and 2017, the numbers visiting the region increased by 17% and revenue increased by 6.5%.<sup>10</sup>**

An important component of Cork city's attractiveness to tourists is its reputation as one of Ireland's leading arts and culture hotspots, but here too there are challenges in relation to the potential for Brexit to impact on the wider arts sector:

**It [is] important to keep Brexit in mind, particularly given the volatility and vulnerability of an arts sector on the brink of major economic and logistical upheavals.<sup>11</sup>**

The transport sector has endured a particularly difficult period in the context of not just Brexit, but more especially the covid-19 pandemic. A dramatic reduction in tourism and travel linked to the pandemic was acutely felt by airports and ports.

The Port of Cork is the second largest port in the state and since Brexit has seen its number of direct shipping routes to continental Europe increase as producers look to avoid the UK land-bridge. Cork Airport continues to recover from the fallout from the pandemic with the introduction of new routes between Cork and Europe and the reinstatement of others.

As the EU's second largest English speaking city (after Dublin), Cork has the potential to become a particularly attractive location for international students who might otherwise have chosen Britain for their studies.

**There has been a substantial increase in EU student numbers across the Irish university system, with an average increase of around 20% from 2020 to 2022, distributed across both undergraduate and postgraduate programs.<sup>12</sup>**

The implications of Brexit for further and higher education also apply to the research environment. Maintaining links between British and Irish research institutions is important, but becoming more difficult in the context of UK Higher Education institutions no longer being eligible to participate in EU funded research programmes.

Relations and links between Cork, Northern Ireland and other parts of the UK have also been effected by the fallout from Brexit. Reducing levels of trade between Ireland and GB have been accompanied by a deterioration in connectivity between, for example, Wales and Cork.

<sup>10</sup> Irish Tourism Industry Confederation (2018) 'Deal or No Deal?', Brexit Bulletin No. 5, 25 July, available at: <https://www.itic.ie/BREXIT-BULLETIN-JULY-2018/index.html>. A significant reduction in tourism traffic since 2020 is linked to the effects of the covid-19 pandemic making it difficult to accurately account for the impact of Brexit on Ireland's tourism industry.

<sup>11</sup> C. Clarke (2020) 'The Art of Managing Brexit', Irish Association for Contemporary European Studies (IACES) Blog, 29 September, available at: <https://www.iaces.ie/post/the-art-of-managing-brexit>.

<sup>12</sup> Lewis Purser, Director of Learning, Teaching and Academic Affairs at the Irish Universities Association quoted in: V. Stacey (2022) 'Bounce in EU students, but Ireland faces EU competition', The Pie News, 7 April, available at: <https://thepienews.com/news/bounce-in-eu-students-but-ireland-faces-european-competition/>.



# AN ALL-ISLAND ECONOMY, THE PROTOCOL AND BREXIT: WHAT DOES IT ALL MEAN FOR CORK?

Michael D'Arcy, Senior Research Associate, Centre for Cross Border Studies

---

## THE NEW BEGINNING

In response to the UK's 2016 referendum decision to leave the EU, the Irish Government undertook a successful diplomatic campaign to protect the interests of the island of Ireland. The core purpose of this effort was to mitigate Brexit's impact and to 'avoid a hard border' on the island and thereby protect peace, the 1998 Belfast/Good Friday Agreement, and the all-island economy.

Ireland is now, for the first time, in the EU without the UK but with a unique EU/UK Agreement which is complemented by existing all-island mechanisms, agreements and relationships (e.g. InterTradeIreland; cooperation in tourism marketing; the all-island sanitary and phytosanitary zone; etc.).

## A STRATEGIC QUESTION FOR CORK

The tangible strategic outcomes of the Irish Government's pre-Brexit campaign are:

- ✓ **Securing the support** of the EU to mitigate the impact of Brexit and how it was being pursued by the UK resulting in agreement on the Ireland/Northern Ireland Protocol;
- ✓ **That Agreement** including commitments to maintaining no hard border on the island,<sup>13</sup> to protect conditions for North-South cooperation, and to retain the Common Travel Area (CTA);
- ✓ The **successful delivery** of a comprehensive series of well-resourced **supports to help business** in every part of the jurisdiction to 'prepare for Brexit'.

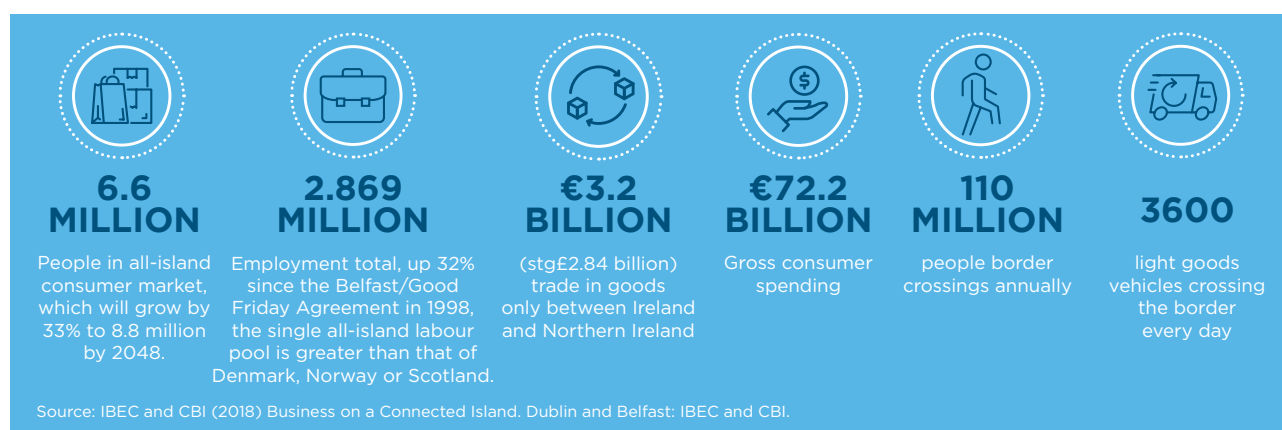
Now the UK has left the EU, there emerges a strategic question for Cork: to identify where the all-island economy, protected by the Ireland/Northern Ireland Protocol, delivers social, economic, cultural, and commercial benefits supporting the development of Cork and the wider region?

## WHAT IS THE ALL-ISLAND ECONOMY?

The formal launch of the European Union's single market - which facilitates the free movement of goods, people, services and capital between EU member-states - formed the backbone for economic relations between the UK and Ireland after 1992. It was within this context that Sir George Quigley<sup>14</sup> first mooted the idea of an all-island economy on the island of Ireland:

**'I envisaged the island as a regional space - an economic zone - permeated by complex circuitry reflecting a network of market and non-market relationships.'**<sup>15</sup>

Sir Quigley's vision conceived of the island of Ireland as a single economic unit (but not a single political unit) which would capitalise on the totality of economic relationships for the mutual benefit of all. The all-island economy can, therefore, be understood as a 'natural economic zone' which delivers significant economic benefits. Those benefits include:



EU membership, and particularly membership of the single market, facilitated the development of a North-South trade environment on the island of Ireland. All-island trade, however, is based on a high-level of intra-industry trade involving the exchange of similar products within the same industry. This applies in particular to the agri-food industry and is based on complex cross-border supply-chains.

<sup>13</sup> However, this required the introduction of controls on the movement of goods between Northern Ireland and Great Britain which are objected to and opposed by political unionism and are subject to pressure from the UK Government for on-going negotiation. Independent research shows the great majority of businesses have now adapted to the new rules and many are taking advantage of its special advantages.

<sup>14</sup> Sir George Quigley had a distinguished career in the Northern Ireland civil service as Permanent Secretary of a number of departments. In 1989, he became Chairman of Ulster Bank and at the time of his death in 2013, he was Chairman of Bombardier Aerospace in Belfast. He also served as President of the Economic and Social Research Institute in Dublin, in addition to serving on a number of other public bodies North and South. In 2002, Sir Quigley carried out a review of the Northern Ireland Parades Commission and was part of the team which oversaw the 'putting beyond use' of loyalist paramilitary weapons.

<sup>15</sup> G. Quigley (2013) 'North-South Cooperation in 2013: Towards an ever closer Working Partnership - Interview with Sir George Quigley conducted by Dr Andy Pollak', Journal of Cross-Border Studies in Ireland, No. 8, pp. 15-28, available at: <https://crossborder.ie/journals/ccbs-issue-8/>.

For example, in 2018, food and live animals made up 32 per cent of all Northern Ireland's goods exports to Ireland. In contrast, food and live animals made up 41 per cent of Northern Ireland's goods imports from Ireland.<sup>16</sup>

Recent analysis of the growth in all-island trade integration shows that the scale of Ireland's trade with Northern Ireland, relative to its trade with other countries, is still less than what would be expected of two jurisdictions located adjacent to each other. Moreover, all-island trade and business is currently more important to Northern Ireland businesses than it is to their counterparts in Ireland.<sup>17</sup> Trade between Cork and Northern Ireland is estimated to be limited in scale.

## SCOPING THE ALL-ISLAND CONTEXT

The UCC Brexit Briefing Workshop comprising representatives of a broad spectrum of business and academia in Cork met to consider and scope out the all-island context as it may apply to Cork and the wider region.

Participants were first presented with key data points on the all-island economy including:

- ✔ **Population:** The island is currently 7 million people, but it should exceed 8 million soon and reach 10 million this century (i.e. a population close to that of Sweden's).<sup>18</sup>
- ✔ **Cross Border Trade and Business:** Lowest in EU in 1992, at EU average by 2018, but since then goods 'exports' from the Republic of Ireland to Northern Ireland have grown. Exports to Northern Ireland were €710 million during January to February 2022, up €265 million (+60%) on the same period in 2021 (which was up by a similar percentage to 2019). Imports from Northern Ireland were over €700 million in the first two months of 2022. This is an increase of €196 million (+37%) to €732 million when compared with January to February 2021.<sup>19</sup>

Then comparative regional data points were highlighted including:

- ✔ **Population:** In 2021 Cork city's population was **210,853**<sup>20</sup> and Belfast city's was **342,600**.<sup>21</sup> [Note: Figures here rely on those which relate to local government districts. Alternative means of determining and measuring population are also available and produce different population figures].<sup>22</sup>
- ✔ **Comparative Under-Investment:** There is a relative lack of investment in Cork compared to other parts of the state and this is likely to have had a negative impact in terms of limiting the city's growth and development.
- ✔ **Cross Border Trade and Business:** In 1992 Dublin's telephone traffic with Northern Ireland was 'proportionally only one-sixth with Munster',<sup>23</sup> but in 2019 the daily volume of North-South vehicle movements at the North-South border on the M1/A1 was slightly ahead of those on the M7/M8, the main artery to Munster beyond Portlaoise.<sup>24</sup>

In addition, the all-island transport infrastructure deficit was highlighted. An optimum road and rail network for the island would reposition Cork as a southern hub with connectivity along an Atlantic Corridor to Derry/Londonderry and via the east coast to Belfast.

<sup>16</sup> P. Teague (2021) *Brexit and the Political Economy of Ireland: Creating a New Economic Settlement*, London: Routledge, p. 47.

<sup>17</sup> M. D'Arcy and F. Ruane (2018) *The Belfast/Good Friday Agreement, the Island of Ireland Economy and Brexit*. London and Dublin: The British Academy and the Royal Irish Academy, available at: <https://www.thebritishacademy.ac.uk/documents/310/belfast-good-friday-agreement-island-ireland-economy-and-brexit.pdf>.

<sup>18</sup> Compiled using statistics from the Central Statistics Office (CSO), available at: <https://www.cso.ie/en/statistics/population/> and the Northern Ireland Statistical and Research Agency (NISRA), available at: <https://www.nisra.gov.uk/statistics/population>.

<sup>19</sup> See CSO Statistical Release, 14 April 2022, available at: <https://www.cso.ie/en/releasesandpublications/er/gei/goodsexportsandimportsfebruary2022/>.

<sup>20</sup> Cork City Council (2021) *Cork City Draft Development Plan 2022-2028 (Volume 1: Written Statement)*, available at: <https://www.corkcity.ie/en/proposed-cork-city-development-plan-2022-2028/draft-plan-documents/phase-2-draft-development-plan-2022-2028/volume-1-written-statement/>.

<sup>21</sup> NISRA (2021) 2020 Mid-year Population Estimates for Northern Ireland, NISRA Statistical Bulletin, June, available at: <https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/MYE20-Bulletin.pdf>.

<sup>22</sup> Although not widely used, the Organisation for Economic Cooperation and Development (OECD), in cooperation with the EU, has developed a harmonised definition of functional urban areas (FUAs). These are composed of a city (or core) and its commuting zone and aims at providing a functional/economic definition of cities and their area of influence, by maximising international comparability and overcoming the limitation of using purely administrative approaches. Using this measure, Cork and Belfast are both defined as metropolitan areas where Cork has a population of 408,000 and Belfast's population is 767,000 (figures apply to 2015). See OECD Functional Urban Areas by Country, available at: <https://www.oecd.org/regional/regional-statistics/functional-urban-areas.htm>.

<sup>23</sup> G. Quigley (2015) *A Time to Speak: A Selection of Speeches made during the period 1989 to 2013 Reflecting on Economic, Social and Other Issues*, by Sir George Quigley, Belfast: Ulster Bank and Appletree Press.

<sup>24</sup> Transport Infrastructure Ireland (TII) (2019) *National Roads Network Indicators*, April, available at: <https://www.tii.ie/tii-library/strategic-planning/tii-road-network-indicators/TII-National-Roads-Network-Indicators-2019.pdf>

## ALL-ISLAND ECONOMY OPPORTUNITIES AND CHALLENGES

Participants acknowledged that to date there has been little awareness that Cork business benefits from the all-island economy.<sup>25</sup> Overall however, participants felt there are all-island economy opportunities for Cork such as to:

- ✔ **Leverage its scale and proximity:** as goods and people can still move freely to and from Cork to the rest of this island (i.e. relative to moving between this island and GB);<sup>26</sup>
- ✔ **Enhance its 'totality' of all-island connectivity:** by doing more all-island business and having more multifaceted North-South interaction (e.g. for learning, culture and sport);
- ✔ **Identify deliverable all-island priorities:** so local business and civic leaders see tangible benefits for Cork to have an initiative proactively pursuing these opportunities;
- ✔ **Use evident starting points:** currently provided by climate action, more remote working, skills/reskilling needs, tourism recovery and R&D investment; in addition, the construction industry has a long history of providing infrastructure which is unique and unrivalled in an all-island context.
- ✔ **Combine an enhanced all-island outlook with efforts to position Cork as a focal point for a 'Southern Way':** which concentrates, accelerates and grows Ireland's relationship and interaction with Europe and the EU.



<sup>25</sup> One participant representing a large local agri-food company highlighted the role and importance for that sector of integrated all-island supply chains. In general however, trade links between Cork and Northern Ireland do not appear to be extensive and this may partially explain a lack of awareness around the business benefits of the all-island economy.

<sup>26</sup> There is some anecdotal evidence to suggest that against the Brexit backdrop, a small number of Cork traders chose to send goods to the UK via Northern Ireland, as there was a perception that ROI goods arriving into GB from Northern Ireland were not subject to the same checks as ROI goods sent to GB via Dublin or other exit points.

Structural challenges to an all-island economy initiative were perceived to include:

- ✔ A historic, spatial and cultural reality of there being a **limited collective sense** in Cork of having a substantive connectivity with Northern Ireland;
- ✔ **Poor connectivity** and long travel times between North and South;<sup>27</sup>
- ✔ A concern that **priority issues for business in Cork are internal matters** for this jurisdiction, combined with the prioritisation of linkages with the rest of the EU;
- ✔ **Disconnect** between all-island, national and regional bodies;<sup>28</sup>
- ✔ **Lack of a local awareness** of businesses already operating in the all-island economy and opportunities that might exist;
- ✔ **'Invisibility'** of Cork's wider academic, social, cultural, community and organisational North-South connections and interaction (i.e. that must currently be happening).

Overall, set against these challenges was a shared understanding that having a vibrant sustainable and successful all-island economy underpinned by the Belfast/ Good Friday Agreement is no less crucial to stability and prosperity in Cork than anywhere else on the island of Ireland.

Since the UCC Brexit Briefing Workshop, additional and supportive research evidence has been published by the National Economic and Social Council (NESC) in a comprehensive report *Shared Island: Shared Opportunities*.<sup>29</sup> This work sets out useful in-depth evidence and makes practical proposals in a number of key areas such as on climate change and biodiversity actions.

## CONCLUSION

The consensus from this workshop is that Cork needs to acknowledge, consider, and respond to pressing issues emerging now Ireland is an EU member without the UK.

Fundamentally, this is needed to help sustain the peace underpinning current record levels of employment, cultural dynamism and economic growth on the island, but particularly in the Republic.

The following contributions and recommendations contained in this report point to an immediate opportunity to progress such an initiative both in responding to the significant additional economic challenges created by Russia's illegal invasion of Ukraine, but also in the context of looking ahead to Ireland's and Cork's future.

<sup>27</sup> An earlier Cork Chamber project in 2006/2007 sought to provide businesses in Northern Ireland and Cork with reciprocal access to information and pre-booked meetings/networking opportunities with public and semi-state public bodies with a view to accessing public tenders in the other jurisdiction. This was an example of businesses, including SMEs, seeing value in accessing the Northern Ireland market. However, encouraging registration for events was hampered by poor connectivity and the time input required for Cork-based SMEs to attend events in Northern Ireland.

<sup>28</sup> For example: Tourism Ireland promotes the entire island of Ireland abroad. However, the presence of different domestic national tourism bodies for Northern Ireland and the Republic of Ireland prevents the island of Ireland being developed collectively as a tourism product. Fáilte Ireland has had success with dividing Ireland into regional experience brands but the strength and appeal of this strategy could be enhanced further through the addition of Northern Ireland cities/locations, such as by adding Derry to the Wild Atlantic Way, Enniskillen to Ireland's Hidden Heartlands or Belfast to Ireland's Ancient East.

<sup>29</sup> National Economic and Social Council (NESC) (2022) *Shared Island: Shared Opportunity*, NESC Comprehensive Report, No. 157, April, available at: <https://www.nesc.ie/work-programme/shared-island/>.



# BREXIT AND THE ALL-ISLAND CHALLENGES AND OPPORTUNITIES FACING THE ECONOMIC ECOSYSTEM OF THE SOUTH WEST

**Cork Chamber of Commerce**

---

Cork Chamber represents 1,200 members that employ 100,000 people across all industries throughout the city, metropolitan area and county. Our vision is to be a world-leading Chamber of Commerce, delivering on a progressive economic, social and sustainability agenda at the heart of a vibrant business community. International relations is a focus area for the Chamber due to the potential growth and connectivity of the region coupled with an ambitious business community looking to expand into new markets and attract potential investment.

Ireland and the UK have always had an intrinsic trading and business link through years of shared history, culture, drive and vision. For Cork and the South West region, UK clients, suppliers, partners, and friends were a part of everyday life, a norm, a relationship without barriers. However, since the Brexit vote in 2016 this relationship has evolved due to an increased uncertainty, confusion and complexity that was not previously present.



Nevertheless, Cork Chamber has continued to build strong relationships across Britain. In 2018, Cork Chamber partnered with the British Embassy in Ireland to produce the *Joining the Dots* report.<sup>30</sup> This report sought to promote economic opportunities between the UK and South West Ireland. It included an agreed programme of work to drive closer business and academic links.

The report illustrated the potential to develop closer ties between the UK and South West Ireland to stimulate new economic growth. With Cork targeted to become Ireland's fastest growing city region and with a population set to double, the report strategically aligns with the Irish Government's regionalisation plan through the *National Planning Framework and the National Development Plan 2021*, which are the strategies that combine to form *Project Ireland 2040*.

This collaboration between the British Embassy and the Cork Chamber demonstrated that even in the changing geopolitical landscape, meaningful and impactful partnerships are possible between the regions. By working proactively, the Chamber's relationship with the British Embassy has never been better.

One of the areas identified in the report was the impact of sub-optimal physical infrastructure in impeding a growth in trade with the north of Ireland. Rectifying this is especially pertinent for Cork considering the increased North-South trade<sup>31</sup> relative to the decreased East-West trade in the context of the UK and Ireland.

In early 2022, Irish Rail announced that within two years the Cork to Dublin and Dublin to Belfast train services would run sub two-hour services with train speeds of over 200km per hour. Overtime, the re-establishment of a direct flight between Cork and Belfast would also enhance trade possibilities.

**The concept of a functional all-Ireland economy hinges on practical developments such as this, an ever-decreasing travel time between Ireland's major cities.**

With our economies, culture and geography so intertwined, it is inevitable that opportunities continue to arise for close collaboration and partnership. This can be demonstrated in the renewables sector, specifically offshore wind. The geostrategic advantages of Cork Harbour, the second largest natural harbour in the world, ideally positions it as a location for floating and bottom-fixed offshore wind projects. Cork Harbour is in the process of transforming into an offshore renewables hub by the private sector, but Ireland remains far behind the UK in our national strategic plans to fully utilise our natural resources. Ireland can learn a lot from the UK's experience in such projects as Siemens' offshore wind farm operations in Hull. This project has transformed a town previously ravaged by the decline in the traditional fishing industry into a prime example of a region taking advantage of its geographical location to capitalise on the UK's offshore wind industry.

<sup>30</sup> Cork Chamber and the British Embassy (2018) *Joining the Dots: Promoting Economic Opportunity between the UK and South West Ireland*, November, available at: <https://www.corkchamber.ie/wp-content/uploads/2022/02/Joining-the-dots-Executive-Summary.pdf>.

<sup>31</sup> At least some fraction of this trade originates from, arrives in, or passes through Cork.

The key ingredients are available for Cork Harbour to become an unparalleled hub for wind energy in the Celtic Sea, servicing projects in Ireland and the UK from 2025. Floating offshore wind is the economic opportunity of our generation.

Cork Chamber is a leading provider of export documentation services to businesses in Ireland and will continue to support documentation requirements between Ireland and the UK. The EU-UK Trade and Cooperation Agreement (TCA) came into effect at the end of the transition period. The agreement provides for tariff-free, quota-free trade and for sectoral cooperation in a number of important areas. We have kept businesses up to date with developments and new procedures through important communications in relation to the new EU-UK TCA and worked closely with companies to navigate the changes in the new EU-UK trading relationship aiming to ensure the transition is as smooth as possible. While every effort has been made for a seamless transition to the new trade reality with the UK, businesses in Cork must safeguard the viability of their operations. In many cases, this has meant a strategic shift in their supply chain model with an increased focus on mainland Europe for new suppliers. This shift has been enabled by new direct routes to Europe from the Port of Cork.

Brexit has had an impact in Cork but, as with every challenge, there are opportunities. Brexit has not stopped Cork companies proceeding with hugely ambitious business plans. The economic ecosystem of the South West has worked closely to negotiate the uncertainty and complexity of Brexit while maintaining relations with our nearest neighbour. This collective approach has allowed the Cork region to continue to grow and thrive. Cork Chamber is excited and ambitious about the future of Cork.





# THE CASE OF BREXIT PREPARATION AMONG MAJOR IRISH FOOD COMPANIES: FACILITATING POSITIVE ADAPTATION

Michelle Carr, Senior Lecturer, Cork University Business School (CUBS), UCC

**'It is not the strongest or the most intelligent that will survive but those who can best manage change.'** – Leon C. Megginson

If a reminder was needed, Brexit highlighted that Irish food companies in a complex and global environment encounter a multitude of deep uncertainties and emergent risks that can threaten organisational functioning and performance. The degree of dependence on exports to the UK, the dependence on the UK land-bridge to access other markets, and the extent to which production costs could increase, all had the potential to affect Irish food companies which are heavily reliant on the UK market. Developing adequate responses to the threats posed by Brexit required Irish food companies to adopt novel operational modes, reflecting a broad continuum of existing and new management techniques and practices.

This brief chapter outlines the management responses which evolved in three large food companies headquartered in the Republic Ireland; for each of which Brexit posed particularly serious challenges. In so doing, the chapter presents insights into the judgements, behaviours and technological solutions which evolved to enable these companies to plan and formulate for the uncertainty and systemic risks created by this externally induced disruptive event.

Throughout the protracted Brexit negotiations, there was persistent uncertainty about the precise terms on which the UK would leave the EU. This, in and of itself, was a significant challenge characterised by high levels of uncertainty. Perhaps more unique was the slow-moving, hard-to-detect and ever-developing set of potential threats that lurked under the radar of this risk – and which were related to the form that Brexit would take in terms of leading to a ‘soft’ orderly exit or a ‘hard’ disorderly exit. This made it difficult for Irish food companies to precisely define the potential risks and to assess and prepare for the possible consequences.

A research study conducted at UCC’s Business School examined the management choices which evolved in three large food companies headquartered in Ireland; for each of which Brexit posed particularly serious challenges. Data from expert interviews and internal documents was examined to highlight similarities and differences across each of the three companies, relating to how each company adjusted its planning and operational control in an effort to organise this emergent risk. The study’s finding reported that all three companies swiftly recognised – early in 2017 – that continuing to operate in a ‘business as usual’ mode was not appropriate. Interestingly, this approach is in contrast to some classic studies of risk management which indicate that companies often tend to focus on the present and ignore early cues that tell them that their internal or external environment has shifted. Consequently, all three Irish companies observed in this study had the competency to switch in terms of sensing and planning before the market logics of the emergent risk became apparent to all. Each of the companies referenced the Irish experience of prior crisis and ensuing attainment of expertise, as being a significant factor influencing their ability to switch in terms of sensing and planning for this emergent risk. Observed responses included (among others):

- Early and formal recognition of the **emergent risk**;
- Formulation of a **Hard Brexit strategy**;
- Novel **supply chain analysis** and mapping exercises;
- **Stock piling** of product in the UK in advance of Key Brexit Dates;
- Investigation of **tariff implications**; with assistance from Professional Service Firms;
- Establishment of **cross functional working groups** that focused on ensuring ordinary capabilities could be maintained;
- Shadowing **budgeting and forecasting** performance implications based on scenario analysis;
- Deferring of **capital expenditure** in UK projects;
- Establishment of **War Rooms & Scenario Planning**;
- Increased **stakeholder engagement** with political and sectoral bodies;
- Formal **Brexit communication mechanisms** established with key customers and suppliers.

Brexit was a potential risk i.e. the fallout may or may not have transpired as anticipated. Each company could have made the choice to ignore the risks posed by a Hard Brexit scenario. Instead, the study’s findings highlight that the threat posed by Brexit forced each of the companies to move forward to protect and develop their capabilities. In so doing, the study provides empirical evidence to suggest that ‘resilience’, defined as the latent ability and capability to respond to a crisis was activated by these three Irish food companies. This resilience played an important role in safeguarding against any significant supply chain disruption in the Irish food sector when Brexit did occur and subsequently, customers in the Republic of Ireland did not experience the food stock storages observed in the UK.

An element of disruption looks set to continue when 'grace periods' end.<sup>32</sup> This will mean the introduction of trade checks and paperwork (which is currently suspended or limited) in respect of export health certificates and phytosanitary certificates. This will bring additional costs, especially for exporters. Given this situation, each of the three agri-food companies studied here, spoke to reviewing their current reliance on the UK market and to seeking opportunities in the EU market and in third country markets, while recognising that market diversification is a gradual process. A pivoting away from UK markets, however, has (at least in the short-term) been accompanied by increased rates of all-island trade. The agri-food sector has played a role in driving and shaping this evolving economic environment on the island of Ireland.



<sup>32</sup> The EU and UK agreed to temporarily suspend the full application of EU law to Northern Ireland that mandated checks and controls for some sectors covered by the Ireland/Northern Ireland Protocol. These temporary exemptions are known as 'grace periods'.



# CORK, BREXIT AND THE ALL-ISLAND CULTURAL ECONOMY

Fiona Kearney, Director, Glucksman Gallery

---

In 2017, UCC's Glucksman Gallery presented an exhibition entitled *Outposts: Global Borders and National Boundaries* that considered how artists explore the spaces of connection and division between countries. The 2016 Brexit vote happened during the preparation for the show and in order to acknowledge this unexpected and significant change in relation to our own borders, the curatorial team decided to include a series of posters produced by many distinguished UK based artists that advocated for Remain. The images displayed ranged from illustrations by renowned children's illustrator Axel Scheffler to poignant messages of connection ('EU are my sunshine') by distinguished sculptor Anish Kapoor. The cultural sector relies on the mobility of artworks and artists in order to create, share and extend the life of artistic endeavours, a network of people and cultural presentations that has been severely disrupted by the new, expensive and often onerous rules relating to the import of artworks and the freedom of movement for non-EU citizens.

Through language and proximity, there are long-established arts festival and cultural venue links between Ireland and the UK in terms of co-production, and with the support of Culture Ireland, these relationships continue to thrive. There is also a growing and considered programme developing through the British Council to ensure that UK artists and cultural operators can continue to connect with their peers in Ireland. This is not just an East-West axis that connects twin cities such as Coventry and Cork, but also important in the context of continuing North-South cultural relations to move forward.

**The Arts Council in Ireland has long supported all artists on the island of Ireland, and the Glucksman, in a number of recent open calls to artists for exhibitions relating to the Decade of Centenaries, mirrored this approach so that within the cultural sphere a plural sense of Irish identity might continue to flourish.**

Artists, and their work, live across and between borders. The artist Willie Doherty, born in Derry, has twice been nominated for the Turner Prize (an award for UK based artists) and has represented on separate occasions both Ireland and Northern Ireland at the Venice Biennale. It is possible in cultural contexts to affiliate across the networks that support an artist's practice, and in doing so enable more audiences to appreciate not just the layered histories of Doherty's work, but also the ways in which artists and arts organisations wish to produce and present work in numerous forms and formats.

Culture is a space as well as a place, an important site for exchange, understanding and indeed, contested meaning. The same work can produce multiple interpretations, encouraging an awareness of the contingency of identity formation across the island of Ireland, and beyond. So while culture can imagine and redefine territories to its own fictive ends, it is bound by the constraints and politics of the real world. For despite the strong determination among artists and arts organisations to remain part of an all-island cultural economy, and to promote peace and critical understanding through the creation of contemporary artworks, it is clear that there are significant funding as well as creative opportunities available through European networks. Even before the impact of the covid-19 pandemic, the arts sector was overstretched and underfunded, with few arts workers making even the living wage from their work.

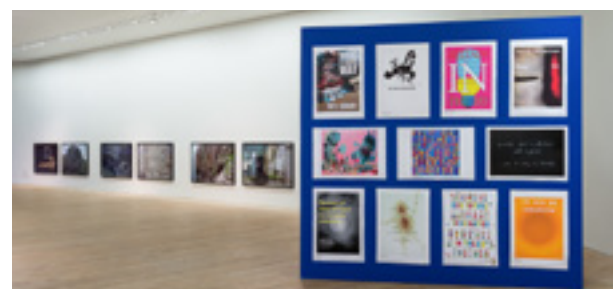
The increased investment in the arts by the current Irish government has helped to stabilise a fragile sector, but it is likely that artists and arts organisations will seek to realise the potential of EU networks to leverage further funding, particularly of multi-disciplinary and ambitious production work that is poorly supported in Ireland. Through the European Bauhaus programme, the EU has sought to position cultural space as one of creative solutions and collaborative effort, and there are significant funding opportunities now available to Irish arts organisations through the Creative Europe programme with UK participants relegated to third party status. The dominance of the English language among cultural communities enables Ireland to bring its linguistic as well as artistic strengths to the

transnational partnerships that are a necessary part of accessing funding.

What is the role of cities such as Cork in this new future? In the Glucksman, we are proud to be working with the Herbert Gallery in Coventry on a co-operation project that highlights the positive impact of refugees in our cities and enables their voices and views to be presented in the public realm. We have much to learn from the diversity embraced by our twin city which includes a large Irish community. We hope too that we can share our strengths of connection and collaboration - our UK colleagues, who recently visited Cork in an exchange supported by the British Embassy in Ireland, noted the cultural ecology of our city and the ways in which we partner not just among ourselves, but with the city council and the university. In a way, this kinship and connectedness is a hallmark of the arts, we seek to connect art with audiences, and in doing so forge new experiences and realities. Perhaps this is the strength that we can bring to a post-Brexit relationship with Britain, a plurality of engagement that allows us to be part of an all-island culture, but one that welcomes the opportunity to extend these identities through European engagement and the welcoming of new citizens from all over the world to our Leaside city.



Above: Installation view of *Border Incident* by Willie Doherty, part of *Outposts: Global borders and National Boundaries* at the Glucksman Gallery, 1 December 2017 - 11 March 2018



Above: Installation view of *Britain Stronger in Europe Artists Posters*, part of *Outposts: Global borders and National Boundaries* at the Glucksman Gallery, 1 December 2017 - 11 March 2018



# CORK'S INVOLVEMENT IN THE ALL-ISLAND HIGHER EDUCATION SECTOR

**Paul O'Donovan, Assistant Registrar, University College Cork**

---

Well-functioning Higher Education (HE) systems are essential to the social, economic, and cultural development of the regions in which they are located. The HE sector is a key participant in fundamental and applied research; knowledge creation and exploitation; human capital development; cultural development; innovation; entrepreneurship; and in creating the conditions for investor attractiveness. Universities acted as crisis responders during the covid-19 pandemic and independent research, commissioned by the Irish Universities Association, put the 2019 value of universities' contribution to the Irish economy at €9bn per annum.

The HE systems in Ireland and Northern Ireland have evolved together and in parallel since the founding of the first universities across the island of Ireland after Trinity College Dublin. Queen's Colleges were established in Belfast, Galway and Cork in 1845 and these Colleges remained part of the same university, the Queen's/Royal University, until changes brought in by the 1908 Universities Act. This act foreshadowed partition in establishing the separate National University



of Ireland (NUI) and the Queen's University of Belfast (QUB).

**Student flows between Ireland and Northern Ireland (and vice versa) have historically been limited and geographically determined.**

Student enrolments from Northern Ireland (NI) in the Republic of Ireland (ROI) comprise some 0.66% (in 2020/21) of the total number and are primarily undergraduates (77%). The proportion of ROI students enrolled in NI is around 4% of total enrolments with a more even split between undergraduate and postgraduate registrations. Geography and transport links play a key role in the institutions chosen by Northern Ireland students with about three-quarters studying in Dublin (TCD, UCD), Dundalk and Letterkenny. In 2020/21, there were only 57 NI-domiciled students registered at MTU and UCC.

Prior to the Brexit vote in June 2016, universities in the UK and their lobbying body, Universities UK, campaigned for a Remain vote. Most individual academics were also opposed to Brexit across Ireland, Britain, and Europe. At the time of the referendum, it was difficult to anticipate the exact effects of leaving the EU as the nature of a withdrawal agreement was yet to be negotiated. However, the primary concerns in 2016 were to do with mobility for students and staff; fees and university funding; access to the EU-funded Horizon programme; and participation by universities in policy making at the EU level.

The UK's hard Brexit means that the EU's 'four freedoms' including freedom of movement of persons no longer apply in the UK and this has had an immediate impact on non-Irish EU student numbers at UK universities which have fallen by some 40%. The UK has also left the EU Erasmus student mobility programme and has established its own scheme, although Northern Ireland students can still participate in the Erasmus programme thanks to Irish government funding. Northern Ireland will no longer be eligible for the European Social Fund, which contributes directly and indirectly to the

university sector. The proposed replacement funding from the UK Treasury will be less generous.

**At the time of writing, the UK has not reached an agreement to associate with the Horizon Europe research funding programme which is the largest programme of its type globally. This is a significant risk for Northern Ireland universities and for Irish universities who are their partners, and for research on the island of Ireland.**

The Irish Government has committed to support a North/South programme for research which 'will be of economic and social benefit to the island of Ireland' and has so far awarded some €37m in funding.<sup>33</sup> In addition, the EU's PEACE Plus programme, worth €1.145 billion from 2021-2027,<sup>34</sup> will support cross-border collaborative research and innovation projects for the designated area of Northern Ireland and the six border counties. There are also provisions to support research collaboration more broadly and on an all-island basis through the establishment of links between partners in the core and non-core designated areas.<sup>35</sup>

Less anticipated but nevertheless important effects of a hard Brexit for Ireland include the disruption of the supply chain for books and periodicals, laboratory chemicals and consumables, and technical equipment which had previously been supplied by or via the UK. Supply chains (and arguably mindsets) are making a turn towards Europe.

The organisation, governance and academic norms of higher education are common across Ireland and the UK. While there is continuing change and adaptation in higher education, it is highly likely that institutions North and South of the border will continue to operate and function in ways that are completely familiar and mutually recognisable. The university sector operates over a medium to long-term cycle of multi-year research initiatives and programmes of education which last from three to five years for undergraduate students and this will likely persist.

<sup>33</sup> Further information available here: <https://hea.ie/2021/08/09/hea-launch-e40-million-north-south-research-programme-2021/>.

<sup>34</sup> The total fund of €1.145 billion includes commitments from the EU, the UK, the Northern Ireland Executive and the Government of Ireland.

<sup>35</sup> Special EU Programmes Body (SEUPB) (2021) PEACE Plus Programme 2021-2027: Programme Overview, available at: <https://seupb.eu/PEACEPLUS>.



In terms of European influences on higher education, the UK was a founding member of the European Higher Education Area (EHEA) and it is expected to remain a member. This means that the UK is highly likely to continue to take part in the processes of standard setting and international harmonisation of higher education (the Bologna Process). The UK will not take part in the European Universities Initiative to create trans-European networks of universities and, as outlined above, participation in the critical EU research programmes is at risk.

There is a strong financial motivation for undergraduate students domiciled in either Ireland or Northern Ireland to remain in either ROI or NI rather than studying in Great Britain. Fees are currently capped at £4530 for NI-domiciled students studying in Northern Ireland and at €3000 for those studying in the Republic of Ireland. Similarly, Irish students pay the NI fee if enrolled in a Northern Ireland institution. The fees for NI and ROI undergraduates to study in England, Scotland or Wales would be at least £9000.<sup>36</sup>

Higher Education and Research gives an opportunity to continue long-standing and high-value collaboration and cooperation on the island of Ireland. There are limited formal all-island structures related to Higher Education and Research with the Royal Irish Academy (RIA) operating on an all-Ireland basis and existing intergovernmental cooperation between, for example, the HEA and the Northern Ireland Department for the Economy. The recently launched North-South Research programme is a promising start for the sector but funding for new initiatives is limited and structural funding issues for the HE sector are unresolved.

For Cork, there are significant additional challenges in developing and maintaining a North-South dimension to the work of the university sector in education, research and third mission. There is also a risk that any interventions perpetuate the existing concentration of North-South links in Dublin.

For education, distance remains the critical factor in students from either jurisdiction choosing to study in the other. With just 57 NI domiciled students registered at MTU and UCC in 2020/21, this is fewer than the number from England, Scotland and Wales. Any solutions will need to consider ameliorating the effects of distance through funding, use of technology or specialisation.

In this context it might be useful to consider enhanced financial support, perhaps via the Shared Island Fund, for students to spend some or all of their education in a different institution in Northern Ireland or Ireland. This might be in the form of an Erasmus or Year Abroad for the island. Alternatively, universities on the island of Ireland could be incentivised to develop and deliver shorter programmes or micro-credentials on topics of all-island significance.

All-island research is being supported by the Shared Island Fund of the Irish Government. Universities in Cork will continue to bid for this funding, but it is overshadowed by the EU Horizon Europe Framework Programme for research and innovation which has a seven-year total budget envelope of over €95bn. The ability of Northern Ireland universities to participate in Horizon Europe is still highly uncertain. This leads to a reduction in confidence in working with Northern Ireland universities and increases the orientation towards Europe for Cork.

<sup>36</sup> It is also worth noting that demographic changes were underway prior to Brexit and are unchanged. ROI student numbers are expected to increase over the next decade while NI student numbers will stay steady or fall slightly.



# RETHINKING RELATIONSHIPS: CORK AND WALES

**Jonathan Evershed, Newman Fellow, University College Dublin**

Brexit has had a profound and destabilising impact on political relationships on and between these islands. The conflict around the Irish border has, for good reason, been Brexit's central and defining one. The Brexit negotiations were dominated by it. And it was, for similarly good reasons – both geographic and political (not that these are divorceable one from the other) – ultimately resolved by placing a new 'border' in the Irish Sea. It was determined that the customs and regulatory checks that Brexit would require would be conducted at a limited number of ports and airports (with existing infrastructure), rather than at more than 200 politically sensitive road crossings. This has had the effect, however, of newly politicising the Irish Sea, and recasting its role as a barrier between these islands. While the issue of the land border can sometimes feel very distant at this end of the M8 (although it shouldn't!), the new maritime border between Ireland and Great Britain has direct and immediate consequences for Cork and so too do constitutional upheavals on the other side of it.

Brexit has not only diminished trust in the British government and (re)opened the constitutional question in Ireland, it has also reignited demands for Scottish independence, and, perhaps even more importantly for Cork, created new demands for political and constitutional change in Wales. As the Independent Commission on the Constitutional Future leads a conversation about Wales' future relationships with the rest of the UK, Ireland and Europe, it is no longer (if it ever has been) 'for Wales, see England'.

37 J. Evershed (2021) 'What's happening in Wales, and why it matters in Ireland', Irish Association for Contemporary European Studies (IACES), 26 November, available at: <https://www.iaces.ie/post/what-s-happening-in-wales-and-why-it-matters-in-ireland>.

38 L. McAllister (2022) 'Now is the time to put Wales on the front foot', Irish Association for Contemporary European Studies (IACES), 28 March, available at: <https://www.iaces.ie/post/now-is-the-time-to-put-wales-on-the-constitutional-front-foot>.

In this context, there are, for Cork, two serious and related questions after Brexit. Firstly, whether and how we might work to overcome the new forms of division that now exist across the Irish Sea, and secondly, what it means to do so in a context where our near neighbours in Wales are thinking about their own constitutional future in a transformed Union (and possibly even beyond it). These are questions with deep historical and cultural resonances for Cork. And they are critical and strategic ones that should be addressed and answered as part of a wider process of re-appraising and restating the place of the city and county in the political economy of 'these islands', Europe, and the wider world.

As Caoimhín De Barra explores in *The Coming of the Celts*, the histories of Ireland and Wales, and their evolution as modern political communities, are intrinsically intertwined. UCC's Claire Connolly has charted the way that the Irish Sea has connected these islands over centuries. Since 1994, cross-border cooperation and the building of policy networks across the Irish Sea has been facilitated by the EU's INTERREG Programme. Through the current phase of the Ireland-Wales Programme (2014-2020), Cork-based higher education institutions (UCC and CIT) have received in the region of €7 million from the European Regional Development Fund to support nine multi-institution projects promoting cross-border innovation, adaptation to climate change and/or cultural and natural resources and heritage (with a number of other projects also including Cork in their area of activity). Also, as highlighted in the *Ireland-Wales Shared Statement and Joint Action Plan 2021-25*, published jointly by the Irish and Welsh governments in 2021, Cork has a particular connection with Swansea in particular, fostered in large part by the long history of ferry travel that connected the people, cultures and economies of the two cities.

The above provides a snapshot of the deep history and current extent of connections across the Irish Sea. But of course, it also belies a more troubled and ambivalent history of relations between Ireland and Wales, of which Brexit is only the latest chapter.

**The process of Cork's disconnection from its Welsh neighbours predates Brexit by a decade (if not longer) with the Cork to Swansea ferry service having ceased operation in 2006.**

After Brexit, the onus is on direct-to-Europe ferry routes which deliberately by-pass Wales and the extra red tape which have so damaged the attractiveness of the 'land-bridge'. As the final funds from the Ireland-Wales programme are being drawn down, no final decision has been made on what, if anything, will replace it so as to ensure that critical cross-border work on climate change, tourism and natural cultural heritage is able to continue. The *Ireland-Wales Shared Statement* provides a framework and a set of priorities for Ireland-Wales relations after Brexit, but these are yet to be fully resourced. Cork can and should lead the way in pushing for or providing these resources, and in shaping a new post-Brexit policy agenda for cross-border cooperation between Wales and Ireland. The time is ripe to reprioritise and rethink relationships across the Irish Sea; to rebuild bridges; and to look for creative ways to overcome the new barriers that Brexit has placed between us.

39 C. De Barra (2018) *The Coming of the Celts, AD 1860: Celtic Nationalism in Ireland and Wales*, Notre Dame, IN: University of Notre Dame Press.

40 C. Connolly (2020), 'Too Rough for Verse? Sea Crossings in Irish Culture', in J. Leerksen (ed.), *Parnell and his Times*, Cambridge: Cambridge University Press, pp. 243-267.

41 G. Lagana and D. Wincott (2020) *The Added Value of the Ireland-Wales Cooperation Programme*, Cardiff: Wales Governance Centre.

42 Government of Ireland and Welsh Government (2021) *Ireland-Wales Shared Statement and Joint Action Plan 2021-25*, available at: <https://www.dfa.ie/news-and-media/publications/publicationarchive/2021/march/ireland-wales-shared-statement-and-joint-action-plan-2021-25.php>.



# RECOMMENDATIONS AND NEXT STEPS

---

## CONSTRUCTING A SHARED ALL-ISLAND INITIATIVE FOR CORK

The UCC Brexit Briefing Workshop undertaken as part of this research exercise considered the possible design of a shared all-island initiative organised and supported by business, civic and academic leaders in Cork. The workshop participants also subsequently submitted their further observations, suggestions and recommendations. Combining both, an opportunity rich picture emerges that can be summarised as follows:

### 1. Establish Cork's current participation in the all-island economy, such as by:

- ✓ Scoping the existing picture of Cork's all-island business: identify and engage with local firms doing North-South all-island business and collate their insights and experience.
- ✓ Having a 'Shared Island and Cork' business strategy: to build on the findings of this exercise and report and to recommend ways to sustain and develop mutually beneficial North-South interaction, including by contributing capacity, insight and interests to all-island initiatives.
- ✓ Re-set Cork's relationship to all-island economic corridors: such as with the Wild Atlantic Way, developing an Atlantic Economic Corridor from Derry to Cork, and as an input to the Dublin/Belfast Economic Corridor.

- ✔ Identify a list of priority all-island investments such as to enhance connectivity of:
  1. Movement: by re-establishing Cork/Belfast air link and encouraging the need for optimum all-island rail and road investment to deliver high-quality all-island connectivity for people/goods.
  2. Education: Cork's HE institutions develop their all-island presence including with new subject and/or task specific connectivity, research and course provision; and to lobby for expansion of the HEA North-South Research Programme.
  3. Networking: organisation of visit(s) by the business and civic community to/from Northern Ireland to develop (new) mutually beneficial North-South island of Ireland relationships.

## 2. Work with local sectors already embedded in the all-island economy, including:

- ✔ Agri-food: where consumer foods/drinks industry have integrated North-South supply chains.
- ✔ Tourism/Experience Economy: where island is promoted globally and cohesively by Tourism Ireland and other national and regional tourism bodies.
- ✔ All-Island Labour Market: that is structurally adjusting to seismic long-term change.
- ✔ HE/Skills/Re-skilling/Learning: in high demand including to support all-island business.
- ✔ All-Island R&D: to support climate action and sustainable food production.
- ✔ Logistics: where connectivity to the continent is re-orientating including via Cork.
- ✔ Culture/Sport/Third Sector: where there are already multiple all-island organisations.

## 3. Develop tangible deliverables to underpin the initiative, for which participants suggested:

- ✔ UK/EU Mapping Exercise of North-South Cooperation: is reviewed to select areas most applicable.
- ✔ Achieving Sustainability: for environment, economy and social development where all-island actions are necessary and being developed and so need a Cork input.
- ✔ Cork as the Island of Ireland's 'EU Hub': identify where there is a strong and compelling case to present and/or develop a cluster of local resources and activities, and launch this in 2023 to coincide with the 50th anniversary of Ireland's membership of the EU.
- ✔ Share Experience of Navigating a 'Plurality of Identity': in a 'whole of island' context and undertake concrete actions of intercommunity understanding and welcome.
- ✔ UCC/MTU with the Cork Learning City Community to propose an Island of Ireland Erasmus-style Student Mobility Programme: that is large and ambitious, complements the North-South Research Programme, and seeks EU funding support.
- ✔ Cork and Derry/Londonderry 'Twin': as an immediate priority to enhance direct connectivity, interaction and network-building to support all the above.

## NEXT STEPS

As a preliminary step to build on the consensus that emerged from this research, the merits of a regional all-island economy leadership initiative in, and for, Cork should be socialised with support from the city's business, civic and academic leadership for a collective all-island initiative that develops the initial agenda of options generated by this workshop.



