Childcare Demand Report

For Development at Old Fort Road, Ballincollig, Cork

on behalf of O'Flynn Construction Group Unlimited Company

May 2026



McCutcheon Halley
CHARTERED PLANNING CONSULTANTS

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Checked by	Majella O'Callaghan	
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www.mhplanning.ie

CORK
6 Joyce House
Barrack Square
Ballincollig
Cork
P31 YX97
T. +353 (0)21 420 8710

DUBLIN
Kreston House
Arran Court
Arran Quay
Dublin 7
D07 K271
T. +353 (0)1 676 6971

McCutcheon Halley
CHARTERED PLANNING CONSULTANTS

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1. Introduction

McCutcheon Halley Planning Consultants have been appointed by O'Flynn Construction Group Unlimited to prepare a Childcare Demand Report which considers the existing childcare facilities surrounding the proposed Large-Scale Residential Development (LRD) at Old Fort Road, Ballincollig, Cork. The report will inform the proposed development consisting of 157 no. residential units and a childcare facility at a site located at Old Fort Road, Ballincollig, Cork.

This report provides details on the current capacity of existing childcare facilities within the area. The capacity of existing childcare facilities will be considered against the demand factors for childcare spaces in the catchment area and the estimated number of childcare spaces that is to be generated by the proposed development.



Figure 1: Location of site (Magenta Pin) relative to the existing urban footprint of Ballincollig (Sources: Cork City Council, 2024)

2. Study Methodology

The catchment area for this childcare assessment was set at 2km from the site boundary. Using the catchment area as a guide, the small area boundaries intersecting it were selected, and Census 2022 figures for these small areas were aggregated by theme and table. Figure 2 below is a representation of the catchment area and the small-area boundaries selected for this report.

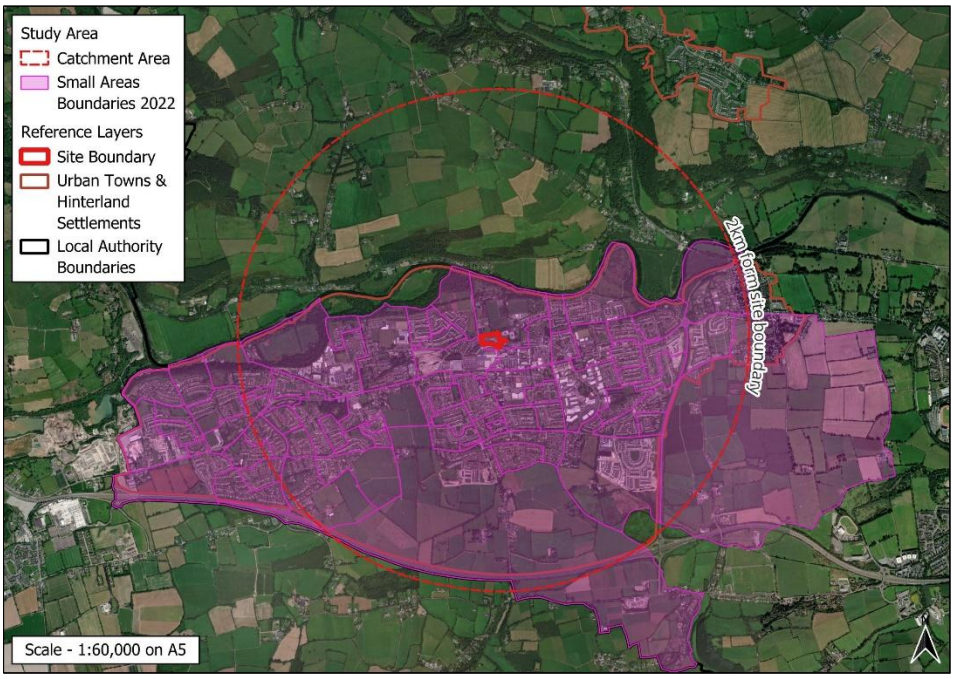


Figure 2: Childcare Catchment Area and 2022 Small Boundaries (Source: Tailte Eireann, 2024)

Several sources were consulted in the preparation of this report, including;

- TUSLA Inspection Reports;
- Cork City Childcare Report provided as Appendix D of the Cork City Councils Opinion Report;
- Census 2022 SAPMAP data;
- Census 2022 Profile 3 – Households, Families, and Childcare;
- The Cork City Development Plan 2022-2028; and
- The Childcare Guidelines for Planning Authorities 2001.

3. Planning Policy Context

This policy review looks at the following material to guide our assessment approach:

- National Planning Framework (NPF) 2040;
- Childcare Guidelines for Planning Authorities 2001; and
- Cork City Development Plan 2022-2028.

3.1 National Planning Framework 2040 (Revisions 2025)

Section 6.5 emphasises the importance of facilities and amenities serving children that are both high-quality and affordable. These sentiments are encapsulated within the first two bullets under National Policy Objective 41, which states:

- *A childcare/ECCE planning function, for monitoring, analysis and forecasting of investment needs, including identification of regional priorities;*
- *The provision and timely delivery of childcare facilities and new and refurbished schools on well-located sites within or close to existing built-up areas, including in support of infill and brownfield development, that meet the diverse needs of local populations and act as a key enabler for housing development, thereby contributing to the development of sustainable communities;*
- *The expansion and consolidation of Further and Higher Education facilities, particularly where this will contribute to wider regional development, and*
- *Programmes for life-long learning, especially in areas of higher education and further education and training where skills gaps are identified.*

3.2 Childcare Guidelines for Planning Authorities, 2001

Appendix 2 of the Childcare Guidelines for Planning Authorities 2001 establishes an indicative standard of one childcare facility per 75 dwellings in new housing areas (Refer to Paragraphs 2.4 and 3.3.1). One facility providing a minimum of 20 childcare spaces is a reasonable starting point in this regard. The Childcare Guidelines acknowledge that other case-specific assumptions may lead to an increase or decrease in this requirement.

The results of any childcare needs analysis carried out as part of a county childcare strategy should also be considered. Appendix 2 also states that the threshold for provision should be established, taking into account the existing geographical distribution of childcare facilities and the emerging demographic profile of the areas.

3.3 Cork City Development Plan 2022-2028

The CCDP 2022 defines childcare as an all-encompassing term which includes crèches, full-day care, part-time care, and sessional facilities, as well as pre-school and school-age (after-school) services. Regarding the provision of childcare facilities, the CCDP 2022 cites the Childcare Facilities Guidelines for Planning Authorities (2001). New residential developments of more than 75 units must consider the need to include a childcare facility. Where it can be substantiated that there is sufficient existing capacity within the area, there may not be a requirement to provide a new childcare facility. Objective 3.21 states the following:

To support the provision and expansion of high-quality childcare facilities throughout the city. The Council will:

a) Require purpose built childcare facilities as part of proposals for new residential developments of more than 75 dwelling units. However, where it can be clearly established that existing facilities are sufficient, alternative arrangements will be considered;
b) Consult with the Cork City Childcare Committee and the HSE on planning applications where childcare facilities are proposed;
c) Require employers with more than 500 members of staff to provide childcare facilities as part of planning applications for significant new and extended development.

Chapter 11 notes that there are five types of locations deemed suitable for the placement of childcare facilities, including new residential developments.

4. Assessment

The local crèche demand, likely to be generated by the proposed development, and the number of existing crèches in the vicinity to cater for it were examined in accordance with current guidelines. In accordance with the Childcare Guidelines, the following was established:

- The emerging demographic profile of the area; and
- The existing geographical distribution of childcare facilities in the area.

4.1 The emerging demographic profile of the area

The demographic profile of the 69 small area boundaries was examined from the Central Statistics Office (CSO) Census of Small Area Population Statistics 2022, which includes a comparative analysis with National and City proportions across several datasets.

The combined population of the 69 small area boundaries grew by 6.8% between the 2016 and 2022 census periods, from 18,315 to 20,471 (CSO, 2023 (1)). During the same period, equivalent values for the State and City increased by 7% and 8.4%, respectively. In 2022, 6.8% of the catchment area's total population was pre-school age (i.e., 0-4 years), which is above the City's figure (5.1%) for this age category.

In July of 2024, the CSO published its population projections based on the results from the 2022 Census. The released population projections were calculated using three scenarios: high net migration, moderate net migration, and low net migration.

The childcare-aged population refers to individuals aged 0 to 4 years. In 2022, there were 295,834 children aged 0 to 4 years across Ireland. The number of children aged 0 to 4 years is projected to decrease by up to 50,000 by 2032. The decline in the national birthrate since 2010 is expected to continue, negatively affecting the number of children aged 0 to 4 years in the future. However, the rate of decline in the number of children aged 0 to 4 years is dependent on the net migration scenario. Figure 3 shows the projected number of children aged 0 to 4 years for Ireland between 2022 and 2057. From Figure 3, it is evident that the rate of decline in the number of children aged 0 to 4 years is highest in the low net migration scenario and lowest in the high net migration scenario. Therefore, it is expected that future demand for childcare services will be lower than the demand levels as of 2022.

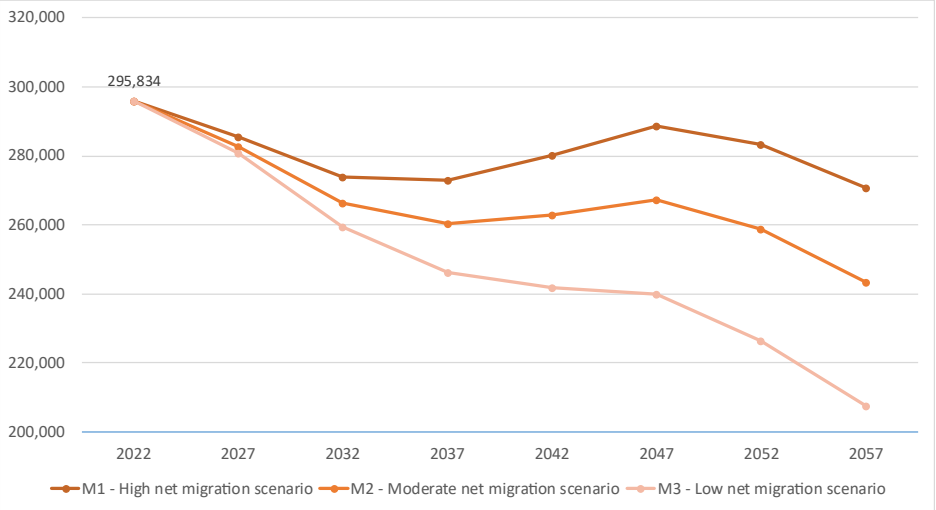


Figure 3: Childcare Aged Population 2022-2057 (Source: CSO, 2024)

Travel trends indicate that the catchment area contains a considerable number of persons travelling to work, college, or school (hereafter referred to as commuters). Nearby employment centres, such as Ballincollig and Cork City Centre, are accessed daily for work purposes. Almost a third (32.3%) of the commuters within the catchment area travelled no more than 15 mins each day to work, school, or college (CSO, 2023 (1)), with a further 39.3% travelling between 15 and 30 mins. Thus, close to three-quarters (71.6%) of commuters in the catchment area travel less than 30 mins to school, college and work each day. The proportion of commuters travelling less than 30 mins to work, college, or school in 2022 in the catchment area was higher than both the proportion for the City (64.4%) and Ireland (57.5%).

4.2 The existing geographical distribution of childcare facilities in the area

The catchment area contains 11 existing childcare providers. The location of these facilities and the number of children each can accommodate are outlined in Figure 4. The list of facilities, along with the approximate distance to the site boundary, is given in Table 1.

4.2.1 Geographic Distribution

The catchment area is defined as a 5–10-minute travel time from the subject site, equivalent to a 2km radius, which is considered a reasonable travel time to access essential services. This study area yielded a total of 11 childcare facilities. The location of these facilities is shown in Figure 4.



Figure 4: TUSLA Early Years Service Providers by Service Type (Source: TUSLA, 2024)

Table 1 outlines the name of each childcare facility, the distance from the site to each facility, and the recorded travel time from the site to each facility. The feasible modes of travel are walking, cycling, and driving. Public transport is not considered, given the short distances involved and the configuration of bus routes in the area.

Table 1: Childcare Facilities and Travel Times from Subject Site (all travel times in minutes)

Facility Name	Distance in Km	Drive (min)	Cycle (min)	Walk (min)
Ballincollig Early Years Pre-School	0.3	1	3	5
Positive Ideas T/A Highcare Childcare	1.2	3	7	19
Innishmore Family Centre CLG	1.1	4	4	15
The Willows Montessori	2.0	5	8	28
Eileen's Playschool	1.1	3	6	17
Na Seoda Óga	1.2	3	6	20
Spraoi Pre-school	0.9	4	5	12
Ballincollig Montessori School	0.8	3	4	14
Child Vision Pre-School	1.9	5	8	27
Cheeky Cherubs	1.3	4	7	23
Rainbow Rascals Montessori School	1.4	4	6	19

The subject site is located within the Ballincollig development boundary and is close to local and regional employment centres. It is reasonable to consider that a proportion of those commuting to these employment centres may also utilise childcare facilities in these areas. This has been illustrated in the commuting data presented above; therefore, for this preliminary assessment, such facilities have been excluded from the research undertaken. As such, the identified capacity in the area should be viewed as a minimum.

The capacity figures for this report for the creches within the catchment area were sourced from the Cork City Childcare Report provided as Appendix D in the Cork City Council Opinion Report (Full report attached as Appendix A to this report). This survey found that the service providers in the catchment area have a combined availability figure of 4 childcare spaces (Table 2).

Table 2: TUSLA register childcare providers within the catchment area and approx. distance to site (Source: TUSLA, 2024)

No.	Service Name	Address	Age Range	Service Type	Availability
1	The Willows Montessori	The Willows, Model Farm Road, Cork, Co. Cork	2 - 6 Years	Sessional	4
2	Ballincollig Early Years Pre-School	The Village Centre, Station Road, Ballincollig, Cork, Co. Cork	0 - 6 Years	Sessional	0
3	Positive Ideas T/A Highcare Childcare	Caisleán Drive, Ballincollig, Co. Cork	0 - 6 Years	Full Day	0
4	Innishmore Family Centre CLG	Innishmore, Ballincollig, Co. Cork	2 - 6 Years	Sessional	0
5	Spraoi Pre-school	9 The Paddocks, West Village, Ballincollig, Co. Cork	2 - 6 Years	Sessional	0
6	Ballincollig Montessori School (TU2015CC071)	85 Beech Rd., Muskerry Estate, Ballincollig, Co. Cork	2 - 6 Years	Sessional	0
7	Eileen's Playschool	8 Glincool Drive, Maglin, Ballincollig, Co. Cork	2 - 6 Years	Sessional	0
8	Na Seoda Óga	Community Centre, Station Road, Ballincollig, Co. Cork	2 - 6 Years	Sessional	0

No.	Service Name	Address	Age Range	Service Type	Availability
9	Cheeky Cherubs	Highfield Park, Carriganarra, Ballincollig, Co. Cork	0 - 6 Years	Full Day, Part Time, Sessional	0
10	Rainbow Rascals Montessori School	22 Hawthorn Ave, Inniscarra View, Ballincollig, Co. Cork	2 - 6 Years	Sessional	0
11	Child Vision Pre-School	c/o Guide Dogs HQ, Model Farm Road, Ballincollig, Co. Cork	2 - 6 Years	Sessional	0
				Total	**4**

*Enrolment figures sourced from the latest inspection report.

The research undertaken highlighted that of the 11 identified childcare facilities, all of which are operating at or close to full capacity. The existing and potential capacity within the crèche facilities indicates that there is sufficient capacity to cater for the proposed development.

4.3 Future Demand Generated by Proposed Development

The proposed scheme consists of 157 apartments to be constructed. The 2025 Apartment Guidelines state that studio and 1-bedroom units need not be considered when determining the appropriate level of childcare. Based on this guidance, all the proposed units were considered to determine the future childcare requirements for the proposed development and consist of the following unit types:

- 80 no. 2-bedroom units.

Based on the State average household size of 2.74, the 80 no. units which require childcare provision are likely to generate a population of 219 persons. Based on the 2022 Census results, we know that 5.7% of the national population is of pre-school age (i.e. 0-4 years). Therefore, the number of preschool children likely to be generated by the completed development is approximately 13 children. As outlined previously, it is unlikely that all children will require childcare services; therefore, the figure of 13 children represents a scenario in which all children housed in the proposed development are placed in childcare. However, the evidence below suggests that this is highly unlikely and that work allowances, such as maternity leave and working from home, reduce the necessity for full-time, paid-for childcare.

It is estimated that only half of children aged 0-4 require some form of childcare service. According to Table 5 of the CSO's Small Area Population Statistics, 50.2% of children ages 0-4 in Ireland were in some form of childcare in 2022. Therefore, it can be expected that up to 7 of the 13 children aged 0-4 years generated by the proposed development will require some form of childcare service.

The CSO breaks down the types of childcare services which parents avail of across Ireland. More than half (56%) of children aged 0-4 are enrolled in a Crèche/Montessori/playgroup/after-school facility (CSO, 2023 (2)). Therefore, it can be expected that up to 4 of the 7 children requiring childcare services generated by the proposed development will be placed in a Crèche/Montessori/playgroup/after-school facility.

The proposed development will provide a childcare facility with a capacity of 29 spaces. Based on the proposed house types and demographic analysis of the area, the projected demand for childcare places will be significantly less than the spaces available within the creche proposed as part of the LRD.

5. Conclusion

This childcare demand report has been carried out to determine the existing childcare facilities within 2km (5–10-minute travel time) of the proposed development site.[1]

Based on the current Census data outlining the demographics of the catchment area and evidence of national trends regarding the uptake of childcare facilities, it is anticipated that the proposed development may generate a demand for up to 7 additional childcare places, although it has been outlined above that in accordance with national research it is probable that only 4 no. children will require a paid for childcare service within the proposed development.

As it is estimated that the proposed development will only generate a demand of 3 to 4 childcare spaces, the provision of a childcare facility with capacity to accommodate 29 children is more than adequate to cater for childcare needs of the LRD and the proposed development will increase the existing childcare capacity in the catchment area by up to 26 childcare spaces.

[1] The modes of travel identified as feasible within the study area are walking, cycling and driving.

6. References

- Central Statistics Office, 2022. Table DRC03 - Average Distance and Number of Remote Work Hubs and Childcare Services to Residential Dwellings, CSO Ireland.
- Central Statistics Office, 2023 (1). Small Area Population Statistics, 2023, CSO Ireland.
- Central Statistics Office, 2023 (2). Census 2022 – Profile 3 – Households, Family, and Childcare: Table F3011, CSO Ireland.
- Tailte Eireann, 2024. Small Area Boundaries 2022. Available online at: https://arcg.is/CCX99
- TUSLA, 2024. TUSLA Register of Early Years Service Providers June 2024.

7. Appendix A

APPENDIX D – External Consultee Reports

- Cork City Childcare

Cork City Childcare

Suite 1, John Dunlop House, Marina Commercial Park, Centre Park Road, Cork, T12 P9PV
Tel: 021 4310500, Email: info@corkcitychildcare.ie

Date: 09/02/2026

RE: LRD 25-16 Opinion at Old Fort Road, Ballincollig, Cork.

To whom it may concern,

Cork City Childcare plays a key role in supporting the development of quality Early Leaning and Care and School Age Childcare services within Cork City. We aim to ensure that Cork City has sufficient capacity to support the growing demand for childcare and support parents to access the free pre-school Early Childhood Care and Education (ECCE) scheme alongside other DCDE (Department of Children, Disability and Equality) related funding initiatives.

This letter is in relation to the proposed development of – **Proposed Large Scale Residential Development LRD 25-16 Old Fort Road, Ballincollig, Cork.**

Cork City Childcare carried out a childcare needs assessment in the surrounding area of the proposed development at the site of Old Fort Road, Ballincollig, Cork. The accompanying table is a list of Childcare Services located in the surrounding area of this development. The childcare needs assessment was conducted with information gathered on the week of 09/02/206. The Childcare Assessment reflects childcare services that are in operation within **Ballincollig, Cork,** area. Please note this is a mix of *full day care, sessional preschools, and/or part-time childcare services, combined Early Learning and care/school aged childcare/Standalone School Age Settings.*

Directors: Eibhlin Mhic Pharthalain, Eileen Wedel, Marian Quinn, Johanna Forde
CRO Number: 354923 Charity Number: 20204749

Cork City Childcare

Suite 1, John Dunlop House, Marina Commercial Park, Centre Park Road, Cork, T12 P9PV
Tel: 021 4310500, Email: info@corkcitychildcare.ie

According to the ***Childcare Facilities Guidelines for Planning Authorities*** **(2001),** a standard provision of one childcare facility accommodating a **minimum of 20 childcare places per approximately 75 dwellings is recommended**. In the context of this proposed development, which comprises 159 apartments to be constructed, this equates to a notional requirement of approximately **42.4 childcare spaces**.

It is important to acknowledge that Ballincollig has experienced significant residential growth in recent years, and the provision of childcare facilities has not kept pace with this expansion. While the Developers regard this Large-Scale Residential Development (LRD) as insufficient in scale to warrant a large, dedicated childcare facility, we are of the view that the inclusion of a larger facility would provide significant benefits to the local community. We continue to receive a high volume of enquiries from parents in the area seeking both early years childcare and after-school care for school-aged children, indicating a clear and ongoing demand that is not currently being met.

Furthermore, there is a particular shortage of childcare places for children aged 0–3 years, which presents a significant barrier for many parents attempting to return to work after parental leave. Securing a childcare place for this age group is increasingly difficult, and the lack of availability places considerable stress on families. The construction of the new childcare facility within the Heathfields Large-Scale Residential Development (LRD) in Ballincollig was widely welcomed by the Ballincollig community. Since opening in October 2025, the facility has reached full capacity and currently operates with waiting lists. This demonstrates the significant demand for, and ongoing need for, additional childcare provision in this area of Cork. The availability of after-school childcare for school-aged children in the Ballincollig area has also been identified as limited, with many parents facing significant challenges in securing suitable care during the evenings. This further highlights the need for additional childcare provision within the community.

Directors: Eibhlín Mhic Pharthalain, Eileen Wedel, Marian Quinn, Johanna Forde
CRO Number: 354923 Charity Number: 20204749

Cork City Childcare

Suite 1, John Dunlop House, Marina Commercial Park, Centre Park Road, Cork, T12 P9PV
Tel: 021 4310500, Email: info@corkcitychildcare.ie

It is therefore imperative that a full-day care facility be considered. This area is in genuine need of such a service, and even a slightly larger development would provide a much-needed resource for local families. The Childcare Needs Assessment included in the planning report submitted by McCutcheon Halley Planning Consultants, references that there is sufficient capacity in the 12 identified childcare facilities. We wish to emphasise that the overall provision of childcare in the area remains insufficient. Additional facilities of this nature are urgently required to meet the needs of the growing population and to ensure adequate support for new families within the community. It is also important to note that the figures highlighted in the Mc Cutcheon Halley Childcare Demand Report in relation to service availability may not accurately reflect actual capacity. These figures are derived from Tusla inspection reports, which record attendance on the day of inspection and therefore may not represent the true availability of childcare places. Most these services are operating at max capacity.

It is clear from the capacity assessment below undertaken by Cork City Childcare that there are minimal places available in the area. There are 10 childcare services offering preschool only sessions, operating on only a 15-hour week basis. In most cases additional childcare provision, alongside this three hour per day, is required to meet the needs of working families and parents engaged in training and education.

Within the area of the proposed development there are only five full day care settings. Only four of these settings is currently providing care for children under the age of two years. There is three Part-time childcare facilities, along with five School Age Childcare facility/facilities. Many of the childcare services listed below operate an internal waitlist, to meet the needs of families already within the service, that often **comprises of a two year wait.** Please note this is not inclusive of the external waitlist available to additional children and families in the area. The demand for baby places is at an all-time high.

Cork City Childcare

Suite 1, John Dunlop House, Marina Commercial Park, Centre Park Road, Cork, T12 P9PV
Tel: 021 4310500, Email: info@corkcitychildcare.ie

The Annual Early Years Sector Profile Survey 2023/2024 states that There are only 17 available services for up to 1-year olds across Cork City, yet 371 babies are on waitlists. You can find more information here: https://www.pobal.ie/childcare/capacity/

Everchanging dynamics in how young families are now living has also added to the already existing childcare demand associated with the area.

According to *Census of Population 2022 Profile 3 - Households, Families and Childcare* National

- Almost one-third (331,783) of children under the age of 15 in the State were in some form of childcare.
- A crèche or a similar facility was the most common form of childcare (42%), followed by an unpaid relative or family member (28%).
- A crèche was the most common type of childcare used among 0- to 4-year-olds. Over half (56%) used this childcare option and a further 19% used an unpaid relative or family member.
- Primary school children were most likely to be in some type of childcare (52%).

Cork City

- There were 146,235 families in Cork in April 2022, up from 138,895 (+5%) in 2016. The average number of children per family in the county was 1.32, compared with 1.34 nationally.
- There were 113,667 children aged 15 and under in Cork in April 2022. Of these, 38,604 (34%) were in childcare, compared with 33% nationally.

Cork City Childcare

Suite 1, John Dunlop House, Marina Commercial Park, Centre Park Road, Cork, T12 P9PV
Tel: 021 4310500, Email: info@corkcitychildcare.ie

Thank you for the opportunity to submit this proposal and contribute to the development of much-needed childcare services in Cork City. Given the significant growth and development Ballincollig has experienced in recent years, I am hopeful that the inclusion of a childcare facility will be seriously considered as part of this project. Please don't hesitate to reach out if you require any further information, clarification, or support as this planning project progresses. I would be more than happy to assist in any way possible to support the consideration and successful implementation of a childcare facility within the development.

Kind regards,

Leanne Twomey

Development Officer

Cork City Childcare Committee

Directors: Eibhlín Mhic Pharthalain, Eileen Wedel, Marian Quinn, Johanna Forde
CRO Number: 354923 Charity Number: 20204749

Cork City Childcare

Suite 1, John Dunlop House, Marina Commercial Park, Centre Park Road, Cork, T12 P9PV
Tel: 021 4310500, Email: info@corkcitychildcare.ie

ELC Childcare Services					
Name	Address	Service Type	Age Range	Capacity	Vacancies
Rainbow Rascals Montessori School	22 Hawthorn Ave, Inniscarra View, Ballincollig, Co. Cork	Sessional	2-6 yrs	11	0
Cheeky Cherubs Early Years Schools – Bishopstown	19 Uam Var Avenue, Bishopstown, Cork City, Co. Cork	Full Day/ Part Time/ Sessional	2-6 yrs	40	0
Cheeky Cherubs Early Years - Ballincollig	Highfield Park Carriganarra, Ballincollig, Co. Cork	Full Day/ Part Time/ Sessional	0-6 yrs	108	0
Child Vision Pre-school	c/o Guide Dogs HQ, Model Farm Road, Ballincollig, Co. Cork	Sessional	2-6 yrs	11	0
The Willows Montessori	The Willows, Model Farm Road, Co. Cork	Sessional	2-6 yrs	22	4

Directors: Eibhlín Mhic Pharthalain, Eileen Wedel, Marian Quinn, Johanna Forde
CRO Number: 354923 Charity Number: 20204749

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Suite 1, John Dunlop House, Marina Commercial Park, Centre Park Road, Cork, T12 P9PV
Tel: 021 4310500, Email: info@corkcitychildcare.ie

Kindercare Childcare	Unit 4,5,8,9,10, Classes Lake Retail Centre, Classes Lake, Ovens, Cork	Full Day/ Part Time/ Sessional	0-6 yrs	190	0
Positive Ideas T/A Highcare Childcare	Caisleán Drive, Ballincollig, Co. Cork	Full Day	0-6 yrs	160	0
Eileens Playschool	8 Glincool Drive, Maglin, Ballincollig, Co. Cork	Sessional	2-6 yrs	22	0
Spraoi Pre-school	9 The Paddocks, West Village, Ballincollig, Co. Cork	Sessional	2-6 yrs	19	0
Innishmore Family Resource Centre	Innishmore, Ballincollig, Co. Cork	Sessional	2-6 yrs	68	0
Na Seoda Oga	Community Centre, Station Road, Ballincollig, Co. Cork	Sessional	2-6 yrs	38	0
Ballincollig Early Years Pre school	The Village Centre, Station Road, Ballincollig, Cork, Co. Cork	Sessional	2-6 yrs	54	0
Montessori An Spiorad Naomh	Scoil an Spiorad Naomh Currraheen Road, Cork	Sessional	2-6 years	22	0

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Tel: 021 4310500, Email: info@corkcitychildcare.ie

First Steps	Bridgefield, Curraheen Road Bishopstown, Co. Cork	Full Day	0-6 years	71	0
Horizons Montessori	Curraheen Road Brigown, Curraheen Road, Bishopstown, Cork	Sessional	2-6 years	33	0

School Aged Childcare Services					
Name	Address	Service Type	Age Range	Capacity	Vacancies
Sherpa Kids Gaelscoil an Chaisleáin	Tanner Park , Coolroe, Ballincollig, Co. Cork	Stand Alone	4-12 yrs	48	0
Cheeky Cherubs	Highfield Park, Carriganarra, Ballincollig, Co. Cork	Combined	4-10 yrs	24	0
Kindercare Childcare	Unit 8, 9 & 10, Classes Lake Retail Park, Ballincollig, Co. Cork	Combined	4-12 yrs	22	0

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Na Seoda Oga	Ballincollig Community Hall, Station Road, Ballincollig, Co. Cork	Combined	4-12 yrs	25	0
Positive Ideas T/A Highcare Childcare	Caisleán Drive, Ballincollig, Co. Cork	Combined	4-12 yrs	60	0

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