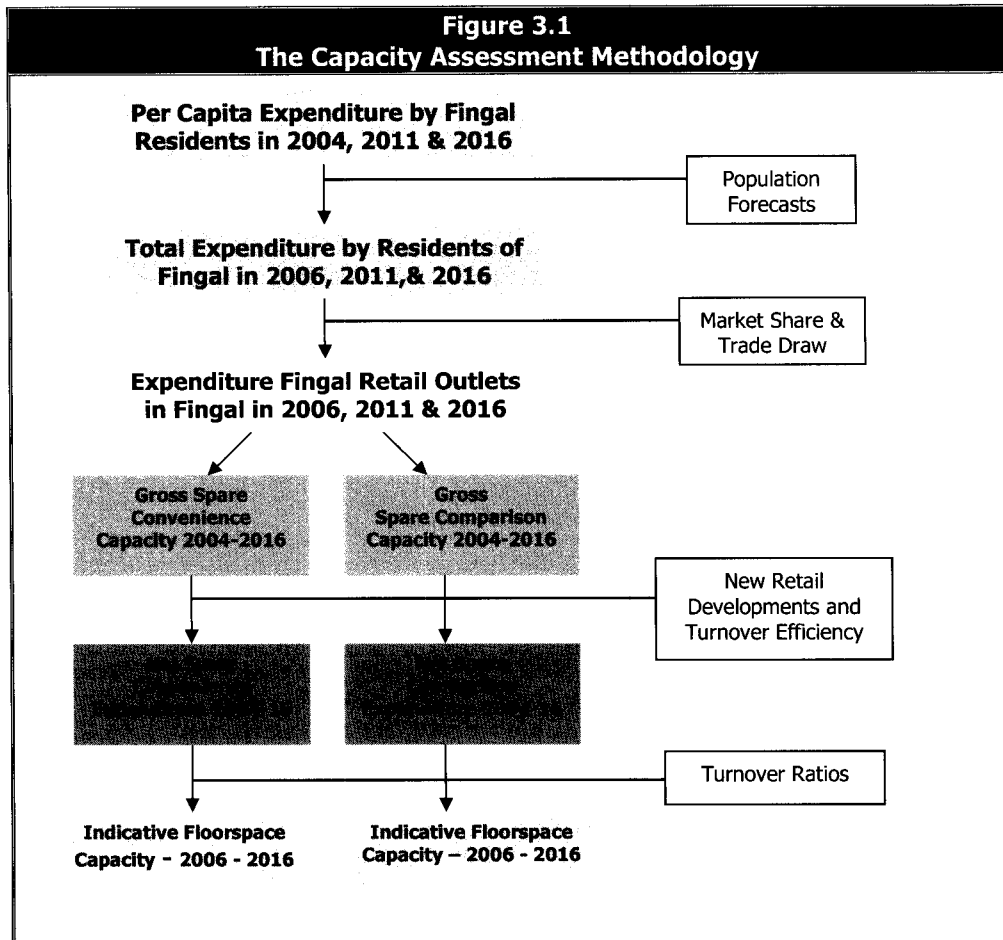


3 CAPACITY ASSESSMENT

- 3.1 One of the key requirements of the RPG is that retail strategies should provide a broad assessment of the additional retail floorspace required in counties over the lifetime of their strategies. The foundations of the assessment for the adopted Strategy were laid down by the GDA Retail Strategy. This section reviews and updates the floorspace capacity assessment in the 2003 Strategy taking account of changes to the population and population forecasts, updated retail floorspace and extant planning permission information and the findings of the 2004 household and shopper surveys.
- 3.2 In addition to updating the information, an important objective of the exercise was to ensure that any amendments/revisions to the baseline information and assessments were referenced to the GDA Retail Strategy to assure linkage between the two strategies and hence enable ease of identification of how and why the County Retail Strategy differs from the regional retail strategy.
- 3.3 A similar exercise will require to be undertaken for the GDA as a whole and in the other county retail strategies. The need to review and update the baseline information underpinning the GDA Retail Strategy was recognised in the commitment made in the strategy to review, monitor and update the strategy's baseline following the update of the SPG. As has been noted, the SPG have been superseded by the Regional Planning Guidelines and the update of the GDA Retail Strategy should therefore follow the finalisation of the guidelines, possibly later in 2004.

PRINCIPLES & OBJECTIVES

- 3.4 The capacity assessment is the mechanism used to estimate the amount of additional expenditure that will occur in the County over the period of the Strategy and the Regional Planning Guidelines (to 2011 and 2016 respectively) and the type and amount of additional floorspace that will be required in order to accommodate this expenditure. At the same time, allowances must be made for any:
- New retail outlets that are planned to come on-line, identified by extant planning permissions
 - Increases in sales in existing stores due to improvements in turnover efficiency
 - Expenditure in alternative forms of retailing – this includes e-retailing, mail order sales and market stalls. It excludes wholesale retail and car sales outlets, as laid down by the RPG.
- 3.5 Figure 3.1 provides an overview of the process used in undertaking the capacity assessment.



3.6 The key inputs and outputs are derivation of the following:

- **Step 1:** Population and Expenditure Estimates
- **Step 2:** Turnover Estimates
- **Step 3:** Turnover Ratios
- **Step 4:** Gross Additional Expenditure Potential
- **Step 5:** Future Sources of Retail Sales
- **Step 6:** Capacity Potential.

POPULATION AND EXPENDITURE ESTIMATES

3.7 The first step is to calculate the total amount of retail expenditure on convenience and comparison goods by the resident population of the County up to 2016. The estimated per capita levels of expenditure are multiplied by the County population forecasts. The per capita expenditure estimates for comparison and convenience goods are derived from the CSO's Annual Services Inquiry for 2001, the latest year for which information has been published. Per capita expenditure estimates for convenience and comparison goods are projected forward based on recent personal consumption growth estimates. The economy, while performing well after a period of slowdown, has not matched the performance of 2000/2001. As such, the per capita estimates are less than those projected in the GDA Retail Strategy. The resulting expenditure estimates are presented in Table 3.1 below.

Table 3.1 Expenditure by the Resident Population (2001 prices, €m): High Population Growth						
Year	Per Capita Expenditure		Population	Total Expenditure		
	Conv (€)	Comp (€)		Conv (€m)	Comp (€m)	Total (€m)
2004 High	3,341	2,814	213,019	712	599	1,311
2004 Low	3,292	2,811		701	599	1,300
2006 High	3,442	2,813	231,030	795	650	1,445
2006 Low	3,358	2,810		776	649	1,425
2011 High	3,708	2,885	275,987	1,023	796	1,820
2011 Low	3,529	2,858		974	789	1,763
2016 High	3,994	3,213	298,199	1,191	958	2,149
2016 Low	3,709	3,071		1,106	916	2,022

Sources: derived from CSO Annual Services Inquiry, 2001, June 2003 and County Incomes and Regional GDP, 2000, March 2003.
Population derived from tables 7.2 and 7.3 of the Regional Planning Guidelines for the GDA, 2003.

3.8 The analysis of retail expenditure is only concerned with expenditure that occurs within retail outlets: i.e. expenditure related to retail floorspace only. As a result, the per capita expenditure figures above have been adjusted to factor out expenditure that does not occur within retail outlets e.g. via the Internet.

TURNOVER ESTIMATES

3.9 The GDA Retail Strategy made use of the household and shopper surveys in estimating the extent of expenditure on goods in retail outlets in the County by the residents of Fingal (market share) and by people living outside of Fingal (trade draw). This allows an estimate of the total amount of turnover by retail outlets

located in Fingal or, put another way, the total amount of expenditure on goods sold in the County.

- 3.10 The County's market share of residents' convenience expenditure is **86.6%** which is a considerable decline from the 2001 position of **92%** and is an issue that we return to later. In contrast, the County has witnessed a substantial increase in its retention of comparison shopping expenditure with this rising to **79.3%** against the 2001 market share of **49%**. As noted in Section 2, this stems from the improvements to the quality, quantum and attraction of its new comparison floorspace in the intervening period.
- 3.11 Over the same period, there has been a large increase in expenditure trade draw from residents outside the County for both convenience and comparison shopping. Convenience trade draw has increased to **19.2%** from the **3%** identified in the GDA Retail Strategy and comparison to **47.8%** from **35%**. These are important increases that add considerably to the potential expenditure available for additional retail floorspace.
- 3.12 As has been highlighted in Section 1, the GDA Retail Strategy set down the principle that whilst expenditure available will increase across the GDA over the period of the GDA Retail Strategy, by virtue of growth in population and per capita spend per head, the net share will stay constant. To remain consistent with the GDA Retail Strategy then the 2001 share figures should be applied. However, the pending review of the strategy will result in the changes found across the GDA local authority areas being incorporated in a revised Regional Retail Strategy. As such, it is appropriate for the revised County Retail Strategy to incorporate the findings of the 2004 household and shopper surveys. For the purposes of the assessment, and following the principle set down in the GDA Retail Strategy, it is assumed that no significant change in shopping patterns is anticipated up to 2016 and therefore the revised market share and trade draw estimates are assumed to remain constant over this period.
- 3.13 To calculate turnover, the amount spent by the residents of the County in retail outlets located outside the County is subtracted from the total amount of potential retail expenditure by residents of the County. This gives us the spend by residents in retail outlets located inside Fingal. In the case of convenience expenditure, this only accounts for 80.8% of total turnover in retail outlets in Fingal. Therefore, the additional 19.2% of total expenditure due to persons living outside the County needs to be added, which gives the total turnover of retail outlets located in Fingal. This is the process used in calculating the turnover figures presented for 2004, 2006, 2011 and 2016 in Table 3.2. Consistent with the GDA Retail Strategy, these are calculated for both low and high economic growth scenarios. We apply the same approach with the respective relevant inputs to the calculations for comparison turnover figures.

Table 3.2
Projected Turnover of Retail Outlets (2001 prices, €m) 2004 - 2016

Period	Convenience		Comparison	
	Low	High	Low	High
2004				
Resident Expenditure		701.2 711.7		598.8 599.4
Less Expenditure Outflow	13.4%	94.0 95.4	20.7%	123.9 124.1
Spend by Residents in County Outlets		607.2 616.3		474.8 475.4
Add Imported Expenditure	19.2%	144.3 146.4	47.8%	434.8 435.3
Spend in Retail Outlets in Fingal		751.5 762.7		909.7 910.7
2006				
Resident Expenditure		775.7 795.2		649.2 649.8
Less Expenditure Outflow	13.4%	103.9 106.6	20.7%	134.4 134.5
Spend by Residents in County Outlets		671.8 688.6		514.8 515.3
Add Imported Expenditure	19.2%	159.6 163.6	47.8%	471.4 471.9
Spend in Retail Outlets in Fingal		831.4 852.2		986.2 987.2
2011				
Resident Expenditure		973.9 1,023.3		788.9 796.3
Less Expenditure Outflow	13.4%	130.5 137.1	20.7%	163.3 164.8
Spend by Residents in County Outlets		843.4 886.2		625.6 631.5
Add Imported Expenditure	19.2%	200.4 210.6	47.8%	572.8 578.3
Spend in Retail Outlets in Fingal		1,043.8 1,096.8		1,198.4 1,209.8
2016				
Resident Expenditure		1,105.9 1,191.1		915.8 958.0
Less Expenditure Outflow	13.4%	148.2 159.6	20.7%	189.6 198.3
Spend by Residents in County Outlets		957.7 1,031.5		726.3 759.7
Add Imported Expenditure	19.2%	227.6 245.1	47.8%	665.0 695.7
Spend in Retail Outlets in Fingal		1,185.3 1,276.6		1,391.3 1,455.4

TURNOVER RATIOS

3.14 The turnover figures for 2004 set out in Table 3.2 are an estimate of the total amount of expenditure spent in retail outlets located in the County. For example, in 2004, Fingal has approximately 34,808m² of convenience floorspace that was generating turnover of €760m and 117,870m² of comparison (including bulky goods) floorspace that was generating turnover of some €910m. Looking at the indicative turnover ratios (turnover divided by floorspace) for **existing** floorspace this would imply a significant degree of overtrading in the convenience sector (€21,834 per m²), while comparison turnover ratios would be considered to be reasonably healthy (€7,720 per m²). To set this in context, existing floorspace turnover in the region of €12,000 per m² for convenience and €6,500 per m² for comparison are considered to be retail industry norms. The level of overtrading found for convenience floorspace

indicates that there is considerable reservoir of additional potential expenditure available to support additional floorspace and the assessment indicates that there is also a marginal level of overtrading in comparison floorspace.

GROSS ADDITIONAL EXPENDITURE POTENTIAL

- 3.15 Using the derived turnover estimates, it is possible to estimate the growth in additional expenditure capacity that will occur in Fingal between 2004 and 2016, as illustrated in Table 3.3.

Period	Convenience		Comparison	
	Low	High	Low	High
2004-2006	79.9	89.5	76.6	76.6
2007-2011	212.4	244.5	212.2	222.6
2012-2016	141.5	179.9	192.9	245.6

FUTURE SOURCES OF RETAIL SALES

- 3.16 The expenditure figures that have been estimated for the County up to 2016 are gross estimates and need to be adjusted to take account of expenditure that may occur via new retail developments that are due to come on stream post 2004 and through increases in turnover efficiency (the possibility of growth in Internet retailing has already been taken into account).
- 3.17 In considering **new retail outlets** regard is had only to those developments with a net floorspace of over 500m² and 1000m² for convenience and comparison retailing respectively. This is consistent with the approach adopted in the GDA Retail Strategy. With the assistance of Council Officers, the list of relevant extant planning permissions has been revised and updated. The freeze date for the extant permissions was February 2004.
- 3.18 Table 3.4 shows that an additional 7,037m² of net convenience and 28,451m² of net comparison floorspace has the benefit of full planning permission. This new floorspace is spread across the County and is estimated to capture of the order of some €255m per year of available potential convenience and comparison expenditure.

**Table 3.4
Extant Planning Permissions**

Location/Type	Floorspace			Turnover	Turnover
	Gross m ²	Net/gross Ratio (4)	Net m ²	€/ m ²	€m
Convenience					
Hamlet Lane, Balbriggan	517	70%	362	10,793	3.9
Balbriggan Shopping Centre	741	70%	519	12,697	6.6
Spice Bakers Site, Balbriggan	414	70%	290	12,697	3.7
	386	70%	270	10,793	2.9
Skerries Road, Balbriggan (1)	1,327	70%	929	13,840	12.9
Pavillions Extension (2) (3)	708	70%	496	11,764	5.8
Superquinn SC, Swords	614	70%	430	11,764	5.1
Lusk Centre	1,000	70%	700	11,764	8.2
Tyrellstown District Centre	2,483	70%	1,738	12,697	22.1
	973	70%	681	10,793	7.4
Ongar House Local Centre (2)	890	70%	623	11,764	7.3
Total	10,053		7,037		90.0
Comparison					
Airside Swords - Additional phase	11,675	80%	9,340	4,444	41.5
Hamlet Lane, Balbriggan	224	80%	179	5,714	1.0
Balbriggan Shopping Centre	125	80%	100	5,714	0.6
Spice Bakers Site, Balbriggan	386	80%	309	5,714	1.8
Pavillions Extension (2)(3)	708	80%	566	6,228	3.5
Superquinn SC, Swords	614	80%	491	5,714	2.8
Blanchardstown Shopping Centre	7,270	80%	5,816	7,491	43.6
Blanchardstown Retail Park	9,180	80%	7,344	4,444	32.6
Tyrellstown District Centre	3,456	80%	2,765	5,714	15.8
Ongar House Local Centre (2)	2,051	80%	1,641	6,228	10.2
Total	35,564		28,451		165.4
Overall Total	45,617		35,488		255.4
<p>Notes: 1. Skerries Road was an extant planning permission at the time of the previous Strategy, a new application has since been granted and this is presented in this table 2. These are extant permissions noted in the previous Strategy, but not yet trading 3. Based on information provided in the Planning Application, we have made assumptions about how this floorspace is divided between convenience, comparison and retail services floorspace. 4. Ratios presented are based on industry norms and are the same as those used in the 2002/2003 Strategy. Based on our experience across Ireland, actual net: gross ratios may differ from these averages for some developments.</p>					

- 3.19 Assumptions regarding the effect of turnover efficiency growth on additional expenditure potential are based on those made in the GDA Retail Strategy. For existing comparison floorspace, turnover efficiency growth of 1% per annum is anticipated to accommodate additional comparison expenditure of €10.6m between 2004 and 2006, €26.5m between 2007 and 2011 and €26.5m for the period from 2012 to 2016. For the new comparison floorspace indicated by extant planning permissions, we have therefore made a further allowance of €1.6m per annum from 2008. Following the approach adopted in the GDA Retail Strategy, there is assumed to be no turnover efficiency growth for convenience floorspace.

CAPACITY POTENTIAL

- 3.20 From the estimates of gross additional expenditure potential in Table 3.3, the expenditure accounted for by the extant planning permissions granted to February 2004 and turnover efficiency growth is subtracted. This results in estimates of net expenditure capacity growth, as detailed in Table 3.5 below.

Period	Convenience		Comparison	
	Low	High	Low	High
2004-2006	43.9	53.5	-0.2	-0.1
2007-2011	158.4	190.5	80.1	90.5
2011-2016	141.5	179.9	158.4	211.1
Total	343.8	423.9	238.3	301.5

- 3.21 The final part of the capacity assessment is to determine the amount of floorspace that is required to accommodate this anticipated increase in expenditure over the period of the Strategy. This is achieved by applying turnover ratios derived in the GDA Retail Strategy for **new** floorspace to the expenditure figures, adjusted to reflect a 2001 price year. For the convenience sector, a turnover ratio of €13,840 is used, while a ratio of €6,228 is used for the comparison sector. These ratios are the average across low, middle and higher order floorspace. Applying these turnover ratios to the net expenditure capacity figures provides estimates of the net floorspace potential available in the County. This is set out in Table 3.6.

Period	Convenience		Comparison	
	Low	High	Low	High
2004-2006	3,172	3,865	-26	-22
2007-2011	11,445	13,766	12,855	14,526
2012-2016	10,223	12,996	25,427	33,898
Total	24,840	30,627	38,256	48,402

- 3.22 The indicative convenience floorspace capacity can be reconciled with the figures contained in the November 2002 Draft County Retail Strategy, as presented in Table 3.7 below. The biggest difference is that Table 3.6 shows indicative capacity to 2016 whereas the County Strategy only went as far as 2011. For the period to 2011, the more recent capacity assessment shows an overall increase in indicative capacity for convenience goods and a decrease for comparison goods.
- 3.23 In the original Strategy indicative convenience floorspace capacity was shown to be between 19,100 and 21,500m² for the period 2002-2011. The more up to date assessment shows indicative capacity of 14,617m² to 17,631m² for the shorter period of 2004-2011. Similarly, for comparison floorspace, the original Strategy estimated indicative capacity of the order of 36,100m² to 55,000m² for the period 2002-2011. The current capacity assessment estimates indicative capacity to be of the order of 12,829m² to 14,504m² for the shorter time period from 2004-2011 for both scenarios respectively.
- 3.24 The main reason for the contrast in the change in indicative capacity can be explained by the extant planning permissions. The amount of indicative capacity for comparison floorspace is moderated by the large number of extant permissions granted for comparison floorspace which is 28,451m² compared with 7,037m² for convenience floorspace as shown in Table 3.4.
- 3.25 The estimates presented in Table 3.6 are also affected by assumptions and information regarding population forecasts and expenditure growth. Specifically, larger increases in population are assumed in the revised capacity assessment following the publication of the Regional Planning Guidelines. Another factor is the slowdown in economic growth and in particular growth in personal consumption, which in turn has moderated comparison per capita expenditure growth.

Table 3.7
Indicative Net Floorspace Presented in Adopted County Retail Strategy
(m²)

	Convenience		Comparison	
	Low	High	Low	High
2002-2006	8,400	9,600	-	4,300
2007-2011	10,700	11,900	36,100	50,700
Total	19,100	21,500	36,100	55,000

Source: Table 3.6, Fingal Draft County Retail Strategy, November, 2002

CONCLUSIONS

- 3.26 Since the preparation of the first Strategy, the County has improved the competitiveness of its retail offer. This has been responded to in its improved market share and trade draw performance, particularly in respect of comparison shopping. Its market share of comparison expenditure has increased from 58% to 79.3%, while the share of convenience expenditure has fallen from 93% to 86.6%. The County’s ability to attract expenditure from those living outside the County has also improved. Imported convenience expenditure has increased from 10% of total expenditure to 19.2% and imported comparison expenditure has increased from 14% to 47.8%. The implication of the increased attractiveness of the County’s shopping offer is that there is scope for further increases in capacity.
- 3.27 The capacity assessment, which takes account of the improved attractiveness of the County’s retail offer, indicates that there is considerable potential for further new convenience floorspace over the periods up to 2011 and 2016. This is further supported by evidence of overtrading in convenience floorspace in the County. As a means of illustration, the indicative capacity figures in Table 3.6 show that there is room for up to 10 new convenience superstores and nearly 1.5 times the existing comparison floorspace in the County between 2004 and 2016.
- 3.28 Table 3.6, however, illustrates that there is less scope for significant levels of new comparison floorspace in the period to 2006 than that set out in the original Retail Strategy. This is due to the quantum of the extant planning permissions that have been granted and the completion of new large retail developments at Blanchardstown and Swords in the interim period.
- 3.29 Finally, it is important to bear in mind that the figures presented in the capacity assessment provide a broad assessment of the requirement for additional new floorspace. They should thus be taken as **indicative** and as **guidance** on the quantum that will be required and are in no way intended to be prescriptive. It is

not the function of the capacity assessment to place a cap on the scope for future retail developments in the County.

4 THE RETAIL HIERARCHY

- 4.1 Determination of the County Retail Hierarchy is a key component of the Strategy and the future pattern of retailing in the County. This is consistent with the RPG and the GDA Retail Strategy. The foundation of the County Retail Hierarchy is the GDA retail hierarchy. However, as has been identified in Section 1, the RPG require from county retail strategies:

'Confirmation of the retail hierarchy, the role of centres and the size of the main town centres'

- 4.2 It is important therefore that, to meet the RPG requirements, the framework for the County Retail Hierarchy should be examined. The GDA Retail Strategy also highlights the importance of the retail hierarchy for the following reasons:

'The distribution of new floorspace should be linked to the existing and future retail hierarchy for the GDA, and should be appropriate in scale and character to the hierarchical role of the centre'

- 4.3 Definition of the County Retail Hierarchy is not however starting with a blank piece of paper. It was examined in detail in the preparation of the 2003 Strategy and the hierarchy established was endorsed in the adoption of the Strategy by the Council. The original County Retail Hierarchy therefore provides the baseline for considering factors and influences that have changed since the adoption of the 2003 Strategy and any requirement to revise the adopted hierarchy. As such, our examination of the County Retail Hierarchy reviews and considers the following:

- i. The GDA Retail Hierarchy;
- ii. The Regional Planning Guidelines for the GDA;
- iii. The County Development Plan Urban Development Strategy;
- iv. Comparison of the GDA and County settlement hierarchies set against other factors and influences;
- v. The roles and functions of different centres in the hierarchy; and
- vi. The role and importance of the retail hierarchy.

GDA RETAIL HIERARCHY

- 4.4 The GDA Retail Strategy sets out the GDA retail hierarchy. Prior to any review of the GDA Retail Strategy, it is important to recognise that the strategy provides a strategic policy framework that continues to have immense importance in providing a coherent regional structure for planning retail development across the GDA. It was a strategy that evolved with the consensus of the seven local authorities that make up the GDA. The retail hierarchy distinguishes between centres in the Metropolitan Area and the Hinterland Area of the GDA. This is founded on consideration of the

following:

- The land use and transportation planning framework set out in the SPG – this was a particularly important determinant of the shape of not only the hierarchy but the GDA Retail Strategy as a whole
- Existing statutory development plan zoning/settlement hierarchy – these are noted as a fundamental influence on the GDA Retail Strategy
- Shopping patterns from the household and shopper surveys – these have identified the strength and draw of specific centres
- The dynamics of the retail sector.

4.5 Table 4.1 sets out the GDA retail hierarchy and highlights where different centres in Fingal sit in the hierarchy.

Table 4.1 GDA Retail Hierarchy		
	METROPOLITAN AREA	HINTERLAND AREA
LEVEL 1	Metropolitan Centre	
	Dublin City Centre	
LEVEL 2	Major Town Centres	County Town Centres
	Swords Blanchardstown Lucan/Clondalkin - Liffey Valley Tallaght Dundrum Dun Laoghaire Bray Leixlip, Maynooth or Celbridge	Navan Naas/Newbridge/Kilcullen Wicklow
LEVEL 3	Town and/or District Centres (1)	Sub-County Town Centres
	Including, but not confined to Fingal: Malahide/Portmarnock Dublin Corp: Finglas, Northside, Artane, Omni Park, Donaghmede, Kilbarrick, Phibsboro, Ballyfermot, Ballymun, Crumlin, Sundrive, Rathmines Merrion, Ayrfield, Docklands South Dublin: Balgaddy, Clondalkin, Lucan, Kilnarnagh, Rathfarnham Dun Laoghaire Rathdown: Nutgrove, Stillorgan, Blackrock, Dalkey, Cornelscourt, Cherrywood Wicklow: Greystones Kildare: Leixlip, Maynooth or Celbridge (subject to choice of Major Town Centre), Kildare, Killock	Balbriggan Athy Kildare/ Monasterevin Trim Kells Ashbourne Arklow

**Table 4.1 Continued
GDA Retail Hierarchy**

	METROPOLITAN AREA	HINTERLAND AREA
LEVEL 4	Neighbourhood Centres	Local Centres – Small Towns and Villages
	Examples include: Dublin Corporation: Prussia St., Sandymount, Fairview, Clontarf etc. Fingal: Castleknock, Corduff SC, Roselawn SC Dun Laoghaire Rathdown: Ballinteer SC, Sandyford SC South Dublin: Fortunestown, Killinarden, Deansrath, Bawnogues, Neilstown, Knocklyon	Examples include: Wicklow: Rathnew, Newtownmountkennedy Blessington, Baltinglass, Carnew, Rathdrum, Ashford, Aughrim, Avoca, Dunlavin, Kilcoole, Roundwood, Shillelagh Tinahely, Kildare: Johnstown, Prosperous, Kill, Ballymore Eustace, Rathangan, Castledermot, Clane, Sallins, Fingal: Skerries, Lusk/Rush, Donabate, Portrane, Balrothery, Meath: Enfield, Summerhill, Nobber, Ballivor, Athboy, Oldcastle, Duleek, Slane, Clonee, Dunboyne, Dunshaughlin, Ratoath
LEVEL 5	Corner Shops	smaller villages/ crossroads - rural shops (post offices, creameries, public houses, petrol filling stations etc.)
(1) The identification of Town and/or District Centres as indicated reflects the different functions and potential of centres within this level of the hierarchy. The designation of Town and/or District Centres is a matter for individual Planning Authorities to determine in their retail strategies and development plan variations. With the consolidation and expansion of the Metropolitan Area, the potential exists for further district level retail facilities to be developed in association with planned residential areas. Also existing Neighbourhood Centres may be extended/upgraded to become District Centres where need/potential arises. Existing standalone villages/settlements such as Rathcoole, Newcastle, Saggart etc. may also in the longer term be absorbed by the Metropolitan Area and become locations for District Centres.		

REGIONAL PLANNING GUIDELINES FOR THE GDA

4.6 The Regional Planning Guidelines for the GDA were published in July 2004. Preparation of the guidelines involved a review of the SPG which were a key influence on the shape of the GDA retail hierarchy and subsequently on the shape of the 2003 County Retail Hierarchy. The guidelines largely endorse the settlement hierarchy of the SPG although they introduce a new nomenclature for different centres in the hierarchy. As has been noted in Section 1, the Draft Regional Planning Guidelines proposed extending the boundary of the Metropolitan Area in the Fingal area northwards to include Rush and Lusk and designating them Moderate Growth Towns. However, following submissions by the Council, in the final version of the guidelines the boundary within the Fingal area remained unchanged with Rush and Lusk remaining within the Hinterland area of the GDA and designated as Moderate Growth Towns.

- 4.7 The Regional Planning Guidelines build upon the settlement strategy outlined in the SPG by identifying two settlement types. The SPG identified Primary Development Centres and Secondary Development Centres. The guidelines identify Primary Dynamic Clusters and Secondary Dynamic Clusters (Lusk and Rush). Unlike the SPG, clusters may include differing urban settlements from the following six tier hierarchy:
- i. **Metropolitan Consolidation Towns** – which will be the main growth area within the Metropolitan Area – these include Blanchardstown and Swords in Fingal;
 - ii. **Large Growth Towns I** – of which there are none proposed in the County;
 - iii. **Large Growth Towns II** – Balbriggan is the only centre proposed in Fingal;
 - iv. **Moderate Growth Towns** (County Towns and Towns over 5,000 population). Such towns occur both in the Metropolitan and Hinterland Areas – in Fingal these include Donabate, Baldoyle, Lusk, and Rush;
 - v. **Small Growth Towns** (Towns 1,500-5,000 population). Such towns occur in the Hinterland Area and are not specifically identified in the Regional Planning Guidelines; and
 - vi. **Villages** (Villages 1,000 population) – within this category are two further categories: (a) Commuter Villages and (b) Key Villages. Such villages occur in the Hinterland Area – these are not specifically identified in the guidelines.

COUNTY DEVELOPMENT PLAN URBAN HIERARCHY

- 4.8 The Fingal County Development Plan 1999 set out a **County Urban Hierarchy Strategy**. This provided a settlement structure that had wider objectives and a different purpose to a retail hierarchy. It was acknowledged that the County Urban Hierarchy was an interim structure in the Development Plan pending the publication of the GDA Retail Strategy. In the intervening period, the 2003 County Retail Strategy was adopted as a variation to the County Development Plan which included adoption of the County Retail Hierarchy. More recently, the Regional Planning Guidelines have been published which introduces further potential variations to the adopted Urban Hierarchy Structure. These influences and issues have been addressed in the emerging Development Plan Review and a revised Urban Hierarchy Strategy has been identified. Of fundamental importance is that the wider settlement hierarchy and the County Retail Hierarchy are integrated and consistent to reduce the potential for different interpretations.
- 4.9 The **County Development Plan Review** provides the mechanism for this to be achieved. Prior to setting out what the role and function of the different levels in the GDA Retail Hierarchy/County Retail Hierarchy should be, it is important to highlight the differences between it and the County Urban Hierarchy structure proposed in the emerging Development Plan. The proposed Urban Hierarchy is based on the recommendations set out in the NSS and Regional Planning Guidelines Settlement Strategy. The eight types of areas are:

- i. **Metropolitan Consolidation Towns:** both Blanchardstown (includes both the Town Centre and Village Centre) and Swords are identified under this designation. They are also defined as Metropolitan Consolidation Towns in the guidelines;
- ii. **Large Growth Towns:** Balbriggan is the only centre identified under this designation in the County Urban Hierarchy. It is defined as a Large Town II in the Hinterland Area in the guidelines;
- iii. **Moderate Growth Towns:** within the Urban Hierarchy these towns include Baldoyle and Donabate. Both these centres, together with Rush and Lusk, are designated Moderate Growth Towns in the guidelines;
- iv. **Small Growth Towns:** these towns accommodate populations of between 1,500 and 5,000 and include Balrothery and Skerries. Both Balrothery and Skerries are also designated as Small Growth Towns in the guidelines;
- v. **Suburban Centres:** are not specially identified in the guidelines. These towns are developing and established communities in the Metropolitan Area which include Castleknock, Clonsilla, Howth, Malahide, Mulhuddart, Portmarnock, Portrane and Sutton;
- vi. **Neighbourhood Centres/ Villages:** as with (v) above, these are not specifically identified in the guidelines. In the Metropolitan Area, these include: Applewood; Baldoyle Racecourse/Stapolin; Balgriffin; Ballymun (part); Bayside; Brackenstown; Carpenterstown; Carrickhill; Clonsilla; Corduff Shopping Centre; Drinan; Hartstown; Huntstown; Kinsealy; Kinsealey/Feltrim; Laurel Lodge; Mountview; Nevinstown; Ongar; Rathbeale Shopping Centre; Rivervalley; Roselawn Shopping Centre; Santry Demesne; Seabury; and, Tyrrelstown. The only Neighbourhood Village identified in the Hinterland Area is Loughshinney;
- vii. **Rural Villages:** these are specifically not referred to in the guidelines. They include: Ballybogill; Garristown; Naul; Oldtown; and, Rowlestown; and
- viii. **Rural Clusters:** are identified for both the Metropolitan and Hinterland Areas but again not specified in the guidelines. These include within the Metropolitan Area: Coolquoy; Hollystown; and, Rivermeade and in the Hinterland Area – Balscadden; Ballymadun; Hedgestown; Malheney; and, Staffords Town.

Analysis and Review

- 4.10 The **Metropolitan Consolidation Town** designation in the Regional Planning Guidelines and the emerging County Urban Hierarchy is equivalent to the Level 2 GDA Retail Strategy hierarchy **Major Town Centres** and **County Town Centres**. Swords and Blanchardstown are recognised as the key centres in the Metropolitan Area of the County Urban Hierarchy. It is noted that in the emerging County Urban Hierarchy Blanchardstown includes the Town Centre and Blanchardstown Village, however in terms of the retail hierarchy Blanchardstown Village is not included in the designation of Blanchardstown as a Major Town Centre.
- 4.11 Balbriggan is located a level below Swords and Blanchardstown in the retail hierarchy

with its designation as a **Level 3 Sub County Town Centre** in the GDA Retail Hierarchy and the 2003 County Retail Hierarchy. This reflects the nature, scale and location of Balbriggan in comparison to the other two centres. It is recognised as a **Large Growth Town II** in the Hinterland Area in the guidelines and as a **Large Growth Town** in the emerging County Urban Hierarchy reflecting its importance in the north of the County. When set against both Swords and Blanchardstown in the County Retail Hierarchy, it is an important **Town Centre** and more appropriately designated as such.

4.12 The centres defined as **Moderate Growth Towns, Small Growth Towns and Suburban Centres** in the proposed County Urban Hierarchy identified in the emerging Development Plan combine a mix of **Level 3 – Town and/or District Centres** and **Level 4 – Neighbourhood Centres** and **Local Centres** in the GDA Retail Strategy/2003 Strategy retail hierarchy designations. Accepting that the GDA retail hierarchy only sets out examples and does not include all of the centres that would come within these levels of the hierarchy, we would note the following:

- Only Malahide and Portmarnock were Level 3 Town and/or District Centres and the GDA Retail Strategy hierarchy combines them as one centre within the hierarchy. As the footnotes to Table 4.1 highlight, it is a matter for individual Planning Authorities to determine whether a centre is designated a town or a district centre. The County Urban Hierarchy identifies both as **Suburban Centres**, reflecting the constraints that prevail in both greatly increasing in population, residential density and in any expansion of their roles and functions. The 2003 Strategy determined that Malahide was a **Metropolitan Area Level 3 Town Centre** in the GDA and County retail hierarchies and Portmarnock a **Level 4 Neighbourhood Centre**. This distinction continues to hold true given the potential of both centres and their respective roles and importance in shopping patterns.
- Donabate was previously identified as a **Metropolitan Area Level 4 Neighbourhood Centre** in the adopted County Retail Strategy. At present, it has the characteristics of a village rather than a town however it is designated in both the Regional Planning Guidelines and the County Urban Hierarchy as a Moderate Growth Town. It is essentially an **Urban Village** performing a range of functions that require to be recognised in its definition within both the County Urban Hierarchy and the County Retail Hierarchy.
- Baldoyle was identified as a **Metropolitan Area Level 4 Neighbourhood Centre** in the adopted County Retail Strategy. The traditional centre of Baldoyle is characterised by a limited number of local shops which need improvement if the centre is to function as a Moderate Growth Town in the County Urban Hierarchy. It is however a growth centre which is designated in both the Regional Planning Guidelines and County Urban Hierarchy as a Moderate Growth Town. Taking into account Baldoyle's anticipated growth in population its position in the retail hierarchy requires to be monitored.
- Skerries is identified as a **Hinterland Area Local Centre – Small Town/Village** in the adopted County Retail Strategy. Within the County Urban Hierarchy it is identified as a **Small Growth Town**. Skerries is a key local centre in the Hinterland

Area and, given its location and role within the area, it is more appropriate to elevate it to the next level in the County Retail Hierarchy.

- Within the Hinterland Area, Lusk and Rush are small towns that are endorsed as **Hinterland Area Level 4 Small Town/Local Centres** in the County Retail Hierarchy. These centres were identified in the Regional Planning Guidelines as Moderate Growth Towns forming a secondary Dynamic Cluster in the Hinterland Area. However, the County Urban Hierarchy identifies Lusk and Rush as Small Growth Towns. Given their location close to the Metropolitan Area and role in the County Urban Hierarchy, it is appropriate for these centres to remain at this level in the retail hierarchy.
- There are a number of centres within the Metropolitan Area that perform an important role within the County Retail Hierarchy and should be distinguished from other centres. In the current County Retail Hierarchy, to be consistent with the GDA hierarchy, they are designated as a mix of **Established/Mature** and **Retail Enhancement Level 4 Neighbourhood Centres**. As has been noted, the designation of these centres as Neighbourhood Centres was inappropriate to their actual role and function. These centres, under the two designations are:
 - **Established/Mature Centres:** Castleknock; and, Sutton/Baldoye
 - **Retail Enhancement Centres:** Corduff Shopping Centre; Howth; Roselawn Shopping Centre; and, Tyrrelstown.
- The County Urban Hierarchy also identifies a range of other centres as **Suburban Centres/Villages** that are of emerging importance within the Metropolitan Area including Clonsilla, Mulhuddart and Ongar. In assessing their role and function these centres are identified as **Suburban Centres** in the revised County Urban Hierarchy. It may be appropriate to reassign these centres to different designations reflecting their location and character and types of retail they can accommodate.
- **Level 5 – Corner Shops and Smaller Villages/Crossroads** would equate with the seventh level of the County Urban Hierarchy and Level 5 of the GDA and County retail hierarchies and therefore no change is required to the County Retail Hierarchy in respect of this level of centre.

ROLES & FUNCTIONS

- 4.13 In the paragraphs that follow, the roles and functions of different centres at different levels in the GDA Retail Hierarchy are set out. This examination includes additions, omissions and amendments to the GDA Retail Hierarchy. These emerge from review of the Regional Planning Guidelines, the emerging County Development Plan Urban Strategy, the GDA Retail Strategy and the adopted County Retail Hierarchy.

Level 2 – Major Town Centres

- 4.14 Both Swords and Blanchardstown (excluding Blanchardstown Village) are designated as **Level 2 Major Town Centres** in the GDA Retail Hierarchy. In the GDA, only

Dublin City Centre is above this, designated as a **Level 1 Metropolitan Centre**. The Level 2 centres are the most important centres beyond Dublin City Centre. The GDA Retail Strategy states:

'They will tend to serve catchment areas well beyond their immediate locality, they should have potential for significant comparison floorspace and some already have, including higher order shopping and offer a wide range of non-retail services.'

- 4.15 The designation of Swords and Blanchardstown as Major Town Centres in the GDA hierarchy reflects not only the quantum and quality of retail floorspace but also the diversity of other town centre uses in both centres. This includes County Council offices, cinemas/other commercial leisure and cultural and business services. In terms of Blanchardstown, this is an important change in the perception of the centre within the GDA that recognises its development from a regional out of town shopping centre to a more multi-functional town centre. This is consistent with the objectives of the 1999 Fingal County Development Plan and has been achieved by the combined investment of the public and private sectors. This is reinforced by the objectives of the emerging County Development Plan 2005-2011 and the designations of the Regional Planning Guidelines.
- 4.16 Swords was designated as a lower tier centre in the 1999 County Development Plan but identified as a 'Major Centre' in the SPG. This was recognised in the GDA Retail Strategy with the designation of Swords as a **Major Town Centre**, which was reinforced within the 2003 County Retail Strategy. The importance of the centre has been given further weight by the Regional Planning Guidelines and as interpreted in the emerging Urban Strategy for the County.

Level 3 – Town and/or District Centres & Sub-County Towns

- 4.17 At **Level 3** in the GDA Retail Hierarchy, within the Metropolitan Area, Malahide is designated as a **Town Centre** and, in the Hinterland Area, and Balbriggan is recognised as a **Sub-County Town Centre**. The GDA Retail Strategy states the following in respect of each type of centre:

'Town and/or District Centres are widely distributed throughout the Metropolitan Area. They are smaller than the Major Town Centres and will usually be anchored by convenience shopping, offer lower order comparison retailing and have a more limited service role. Typically they will serve catchments within a 10 to 15 minutes drive time of the centre, the size of catchment being determined by the density of the population. Density characteristics will therefore influence the size of centre.'

and

'The Sub-County Centres perform an equivalent role in the Hinterland Area.'

- 4.18 In respect of Malahide, the designation reflects the range, quality and quantum of retail floorspace plus the diversity of town centre uses offered. It was identified as a Major Centre in the SPG and this was interpreted in the 2003 County Retail Strategy as a Town Centre. In the County Development Plan, Malahide is zoned as a Suburban Centre. There are limitations to it meeting the GDA Retail Strategy definition of a Town Centre, although it does have a greater range of functions than characterise a district centre. However, Malahide is not growing to the same extent as other centres and has limited scope to achieve this. In recognition of these characteristics, it is more appropriately designated in the County Urban Hierarchy as a Suburban Centre.
- 4.19 Balbriggan's designation as a Sub-County Town in the GDA Retail Hierarchy reflects its importance as the key centre in the north of the County. As a consequence, Balbriggan is identified as a **Large Growth Town** in the County Urban Hierarchy and as a **Large Growth Town II** in the Regional Planning Guidelines. In terms of the GDA and County retail hierarchies, whilst a Major Town Centre within its local and strategic context, Balbriggan functions, and will function for the foreseeable future, as a **Sub-County Town Centre** within the regional retail hierarchy and as a **Town Centre** in the County Retail Hierarchy.
- 4.20 Within the adopted County Retail Strategy and GDA Strategy, **Skerries** is designated as a **Hinterland Area Level 4 Local Centre**. Recognising its importance in the urban structure of the County, the County Urban Hierarchy designates Skerries as a **Small Growth Town**. As noted, Skerries is a key service centre in the Hinterland Area given its distance from Balbriggan and the Metropolitan Area. It is therefore appropriate to elevate Skerries to become a town centre. However, it is unlikely that Skerries will function above the level of a local centre and is more appropriately designated as a **Level Three Town Centre** in the County Retail Hierarchy. It will not grow to the same extent as Balbriggan and therefore there is a need to differentiate the two centres in the County Retail Hierarchy by introducing a tiered approach to Level 3. Balbriggan will become a **Level 3 Tier 1 Town Centre** and Skerries will be a **Level 3 Tier 2 Town Centre** in the Hinterland Area of the County Retail Hierarchy.

Level 4 – Neighbourhood Centres and Local Centres

- 4.21 **Level 4** centres in the Metropolitan and Hinterland Areas are termed **Neighbourhood Centres** and **Local Centres – Small Towns and Villages** in the hierarchy, respectively. The GDA Retail Strategy defines each as follows:

'Neighbourhood Centres will be strongly represented throughout the Metropolitan Area, typically comprising a parade of convenience stores, the occasional lower order comparison outlet and limited local services. They will primarily serve a walk-in population and will have limited parking.'

and

'Small Towns and Village Centres perform an equivalent role within the Hinterland Area.'

4.22 As we have highlighted, the GDA retail hierarchy provided examples of centres around the different counties that would come under these designations. It was not intended that only centres listed in the Strategy should have these designations. In the Development Plan and County Retail Strategy reviews, the different centres were examined in detail and, reflecting the range of characteristics that prevail, distinctions and additional nomenclature have been incorporated in the revised County Retail Hierarchy. It has also become apparent that the designation for Level 4 Centres within both the GDA and 2003 Strategy does not appropriately reflect the range of characteristics of the different centres. As such, the following structure is recommended for centres at this level in the County Retail Hierarchy:

- **Metropolitan Area: Level 4 Centres** are designated as **Suburban Village/Neighbourhood Centres** and within this the centres are designated as one of the following:
 - i Traditional Suburban Village Centres
 - ii Expanding Suburban Village Centres
 - iii Suburban Neighbourhood Centres
 - iv Suburban Neighbourhood Facilities
- **Hinterland Area:** Lusk and Rush remain important **Level 4 Village Centres** within both the County Urban Hierarchy and the County Retail Hierarchy.

4.23 In addition to the above, it is recommended that **Metropolitan Area** centres classified at **Level 4** in the hierarchy are differentiated into four categories as follows:

- i Those that are **Traditional Suburban/Village Centres** already fulfilling the role of a Neighbourhood Centre;
- ii **Expanding Suburban Village Centres** which are centres experiencing residential growth or have the potential to develop into the role of a Level 4 Neighbourhood Centre;
- iii **Neighbourhood Centres** which are purpose built shopping centres in need of some rejuvenation or updating; and
- iv **Neighbourhood Facilities** which are existing residential areas which lack the appropriate scale of retailing and services required to cater for the local population.

4.24 Consistent with the Regional Planning Guidelines, the emphasis in terms of retail development is enhancing the role and importance of existing centres. In the

Metropolitan Area, there are the **traditional suburban/village centres** of Blanchardstown Village, Mulhuddart, Clonsilla, Castleknock, Howth and Portmarnock Village which have limited potential for any quantum of floorspace. In addition are the **neighbourhood centres** of Baldoyle, Corduff, Roselawn, Carrickhill, Sutton and Rathbeale SC which are all to some degree outdated and in need of some upgrading. In contrast, there are the **expanding suburban village centres** of Donabate, Ongar and Tyrrelstown and numerous **neighbourhood facilities** where there are opportunities for development and these centres to development into the role required at this level.

Level 5 – Corner Shops and Smaller Villages/Crossroads – Rural Shops

- 4.25 The final level in the hierarchy, **Level 5** embraces **Corner Shops** in the Metropolitan Area and **Smaller Villages/Crossroads – Rural Shops** in the Hinterland Area. These are not identified even by example in the GDA Retail Hierarchy and this has been the position adopted in both the adopted and emerging County Retail Strategies.

ROLE & IMPORTANCE OF THE RETAIL HIERARCHY

- 4.26 As with the GDA Retail Strategy, the County Retail Strategy requires to deal with retail issues of a strategic nature. As such, in terms of the distribution of major new retail floorspace, its primary focus is on the upper levels of the hierarchy namely the Major Town Centres and the Sub-County Town/Town Centres. It is therefore important that the hierarchy set is clear as the distribution of new floorspace should be linked to the retail hierarchy for the GDA and should be appropriate in scale and character to the hierarchical role of the centre. Table 4.2, from the GDA Retail Strategy (Table 5.3), provides guidance on the type of shopping that is appropriate to different levels of the hierarchy. As with the GDA Retail Strategy, this is not intended to be prescriptive and our emphasis is on the word **guidance**.

**Table 4.2
GDA Retail Hierarchy – Appropriate Shopping Provision**

Type of Centre	High Order Comparison	Middle Order Comparison	Low Order Comparison	Superstore	Supermarket
Metropolitan Centre	■	■	■	■	■
Major Town Centre (M)	■	■	■	■	■
County Town Centre (H)		■	■	■	■
District/Sub-County Town Centre (M/H)			■	■	■
Neighbourhood Centre/Local Retail Centres (M/H)					■

Note :M = Metropolitan Area; H = Hinterland Area

CONCLUSION

- 4.27 This section has reviewed the County Retail Hierarchy against the framework of the 2001 GDA Retail Strategy, what was set down in the 2003 County Retail Strategy, the strategic framework that is promoted under the Regional Planning Guidelines and the emerging County Urban Hierarchy being promoted as part of the County Development Plan Review process. The outcome of the review of the County Retail Hierarchy has ensured that it is consistent with the County Urban Hierarchy of the emerging County Development Plan.

5 RETAIL DEVELOPMENT POTENTIAL

5.1 The previous sections of the report have set out the policy and quantitative foundations for the County Retail Strategy. In this section, we review and address the influencing factors at a settlement level to determine the potential of the main centres in the County to accommodate additional retail floorspace over the lifespan of both the County Development Plan and the Retail Strategy. The factors that are considered are:

- i. Issues and opportunities;
- ii. Definition of the core retail areas within the main centres; and
- iii. The sequential approach.

Issues and Opportunities

5.2 The assessment of the issues and opportunities has been informed by:

- The health checks provided in Appendix C
- Site and core retail area appraisals undertaken by the team
- Consultations with Council Officers.

5.3 They are reviewed in the first instance at a settlement level in the paragraphs that follow in the following alphabetical sequence:

- i. Balbriggan;
- ii. Blanchardstown Shopping Centre;
- iii. Blanchardstown Village;
- iv. Castleknock;
- v. Corduff Shopping Centre;
- vi. Donabate;
- vii. Howth;
- viii. Lusk;
- ix. Malahide;

- x. Ongar;
- xi. Portmarnock;
- xii. Roselawn Shopping Centre;
- xiii. Rush;
- xiv. Skerries;
- xv. Sutton;
- xvi. Swords; and
- xvii. Tyrrelstown.

Balbriggan

- 5.4 Balbriggan is designated as a Sub-County Town Centre in the GDA retail hierarchy and as a Town Centre in the County Retail Hierarchy in recognition of its strategic importance as the northern development centre for the County. It is designated as a Large Growth Town in the Hinterland Area in the County Urban Strategy and as a Large Growth Town II in the Regional Planning Guidelines. Based on the 2002 Census, it is the fourth largest settlement in the County, after Blanchardstown, Swords and Malahide, and has witnessed population growth (21.5%) that is significantly above that achieved at the County, GDA and State levels over the period 1996 – 2002.
- 5.5 It is the third largest retail centre in the County, after Blanchardstown and Swords. The town centre has a compact and traditional urban form. It is limited in the quality and range of its retail offer and like the majority of centres in the GDA, it is characterised by the independent outlet with few national multiples. With a lack of major retail investment in recent years and competition from higher order centres, it is easy to understand why Balbriggan is perceived as a retail centre in decline. However, review of the GDA Retail Strategy floorspace data indicated that a number of units have changed leases since 2001 and there has been an increase in retail floorspace with the opening of additional units providing an enhanced range of grocery, clothing, hardware and support service outlets.
- 5.6 There is increasing market interest in Balbriggan. This is evidenced by the extant planning consents, pending applications and emerging schemes. There are full planning permissions granted for the redevelopment of the town centre Tesco site, expansion and redevelopment of the SuperValu store on the main street and a discount supermarket on the Skerries Road. In addition, there is active market interest in new convenience and retail warehousing floorspace in a range of out of centre locations.

- 5.7 Although the retail offer in the town is gradually improving, Balbriggan still requires to further enhance and expand its retail floorspace to:
- Meet the needs of the current and planned population and reduce the requirement to travel to meet this need
 - Ensure that the quantum, diversity and quality of the town's retail floorspace is consistent with its status as a Sub-County Town in the GDA hierarchy and as a Town Centre in the County hierarchy.
- 5.8 Within the 2003 Strategy, a number of locations for retail development were identified and their scope explored. These were:
- Spicer's Bakery Site on Drogheda Street
 - The site of 'The Viaduct' car park
 - The Balbriggan Inner Relief Road/Naul Road site that is zoned in the County Development Plan for the development of agriculture and rural amenity
 - Site on the Dublin Road at Castlelands.
- 5.9 **Spicer's Bakery Site:** was identified as a potential redevelopment site in the 1999 Balbriggan Integrated Area Plan (IAP). There is planning permission for the redevelopment of this site as a mixed use scheme incorporating an enlargement of the existing SuperValu supermarket with associated car parking. This will greatly enhance convenience retailing within the town centre. The works have however not proceeded to date but could be complete before 2006.
- 5.10 **The Viaduct Car Park Site:** we understand is in the ownership of the Council and thus does not have the ownership issues common to most town centre sites. There are, however, other issues that will require to be addressed in order that this site can be brought forward for large scale retail/town centre development. In particular, traffic and circulation and environmental factors are key areas that will require in depth consideration. The site is of a size that could accommodate a good sized shopping centre with multi-storey car park. It is the only location within the town centre that could achieve this. The site provides the scope to significantly enhance Balbriggan's retail offer and with this provide the catalyst for regeneration of this relatively declining town centre. It is unlikely that this site/area will come forward in the period to 2006 of the Strategy and thus must be looked to as a key opportunity for the period post-2006.
- 5.11 **Lands at Balbriggan Inner Relief Road/Naul Road:** these were zoned for the development of agriculture and rural amenity in the current County Development Plan but is now zoned for Town Centre uses and land adjacent and to the south of these lands on the Inner Relief Road have been targeted with a Local Objective (14) of retail warehouse development in the emerging County Development Plan. This area is now being looked to as a site for community facilities (e.g. new school and

leisure uses) to meet the needs of the growing population. It was designated as the site for a fire station and is partly owned by Dublin City Council. The site is within what would be defined as an edge of centre location, surrounded by large areas of new or planned residential development and served by good road and public transport infrastructure. These factors combine to make this a site that is compatible with RPG advice and suitable for a District Centre/Neighbourhood Centre scale of development. Whilst there is market interest in this site, there has been no progress with its delivery. As a result, any retail development will be post 2006.

- 5.12 **Site at Castlelands:** this site is located along the Dublin Road and was the subject of a submission to the 2003 Strategy, which proposed retail warehousing, service facilities, local retail facilities and general commercial uses. In February 2003 a variation to the Development Plan that identified the objective of retail warehousing. Given that Balbriggan currently has no retail warehouse floorspace, development of the site for retail warehousing would contribute to Balbriggan developing its role as a Town Centre in the County Retail Hierarchy and meeting retail needs in the north of the County.

Blanchardstown Town Centre

- 5.13 Blanchardstown Town Centre and Blanchardstown Village form a Metropolitan Consolidation Town in both the County Urban Hierarchy and the Regional Planning Guidelines. Blanchardstown Town Centre is one of the key retail locations not only for the County and the GDA but also the country. This has been recognised in its designation (excluding Blanchardstown Village) as a Tier 2 Major Town Centre in the GDA Retail Strategy and the adopted County Retail Strategy. It is one of the few locations within the GDA and the country that has what is defined as 'higher order' comparison floorspace – predominantly fashion and furniture – operated by national and international multiples. As has been highlighted in Section 4, the designation of 'Blanchardstown' as a Major Town Centre as distinct to an out of centre/regional shopping centre is a significant change in the perception/status of Blanchardstown. This has been considerably aided by the public sector investment in civic and community infrastructure which are important components of a traditional town centre.
- 5.14 This Major Town Centre is more comparable to a United Kingdom (UK) New Town town centre than a regional shopping centre in view of:
- i. The range of uses and lack of any major residential component;
 - ii. The geographical spread of uses and floorspace – there is an enclosed retail heart and outlying retail parks but a lack of activity/attraction that characterises traditional town centres;

- iii. Regional shopping centres more typically are characterised as being under one roof; and
- iv. There is a lack of evening activity although this has been changing due to the mix of both public and private sector investment in public and commercial/cultural/eating and greeting facilities/outlets. The town centre now has a cinema, library, theatre and Council offices.

5.15 For the change/perception to be achieved, great steps have still to be made and this will take time based on the experience from the UK. Issues that require specific attention are:

- Its attraction to local people and the wider catchment population plus investors and operators set against older more traditional town centres
- The lack of evening permeability and activity
- Increasing the civic, community and commercial leisure presence in, or adjacent to, the main retail areas to enhance the centre's role as the heart of a Major Town Centre and introduce the characteristics of more traditional town centres
- Urban design issues specifically the public realm, functionalism in the built environment/design that prevails and the dominance of the private car
- The lack of community ownership and responsibility.

5.16 The retail floorspace in Blanchardstown has continued to grow in size over the years. There have been additions to the core – the Penney's extension – and development of a series of retail parks combining a mix of high street retailing with retail warehousing/bulky goods floorspace. These combinations have to date secured its position, not only for Blanchardstown residents, but for the County as a key shopping destination in the GDA. The attraction of Blanchardstown is set to be further enhanced with the development of The Red Mall, an extension to the shopping centre that is anchored by Marks and Spencer, and additional retail warehousing floorspace.

5.17 Blanchardstown, as much as any of the key retail centres in the GDA including the City Centre, has major issues in respect of highways and public transport infrastructure. These have each been key factors in the planning decisions to refuse further expansion of retail floorspace not only at Blanchardstown and but other locations in the GDA. This noted, in terms of looking forward, there is no real appreciation of the capacity of the location in terms of retail floorspace and highways/transportation infrastructure under different scenarios. At present, there is a main shopping centre surrounded by a number of retail parks. These components lack cohesion, linkage and urban density and there is a dominance of surface car parking. The consequence is that unlike a town centre, trips between each area are normally made by car rather than foot. There needs to be a greater intensification of the use of land and property to overcome these issues.

- 5.18 The issues are well recognised, and consistent with the actions identified in the 2003 Strategy will be addressed in the pending Blanchardstown Masterplan (including Blanchardstown Village). From the masterplan will flow the assessment of the capacity for further retail floorspace, the traffic and roads issues that require to be addressed and how and importantly over what timescale.
- 5.19 Blanchardstown is a centre where the owners/operators share the view that it should be one of the top centres in the GDA and in the country. The Council has played its part in moving towards Blanchardstown becoming more than a shopping centre. To move forward and sustain the role and importance of Blanchardstown, there then requires to be a clear vision established on what it should be in the future and the mechanism for achieving this is the pending masterplan.

Blanchardstown Village

- 5.20 The 'Village' is designated as a Neighbourhood Centre under the GDA and County retail hierarchies and forms part of the Blanchardstown Metropolitan Consolidation Town in the County Urban Hierarchy. In the review of the County Retail Hierarchy, Blanchardstown Village is more appropriately designated as a Metropolitan Area Level 4 Traditional Suburban Village Centre. It is a small, attractive and limited centre in terms of its potential for major expansion. Additionally, and importantly, Blanchardstown Village Centre has over the years been overshadowed by Blanchardstown Shopping Centre, which has eroded and displaced any major potential in the village. It has not however stood still, the health check revealed that there has been a net increase in the shopping floorspace since the GDA Retail Strategy floorspace surveys. Shopping is predominantly located along Main Street, around Superquinn and in the Moy Mel Shopping Centre and provides a range of convenience, comparison and support services to the local population. It is not a centre that has any potential to grow much larger due to the lack of development opportunities, its proximity to a Major Town Centre and its place in the hierarchy. However, the range, quality and attraction of the centre embody its role and function as part of the Blanchardstown Metropolitan Consolidation Town.

Castleknock

- 5.21 Castleknock is a similar type of centre to Blanchardstown Village in terms of its urban character, attraction, relative proximity to Blanchardstown Town Centre and level in the retail hierarchy. It is designated as a Level 4 Neighbourhood Centre in the GDA and County retail hierarchies and a Suburban Village Centre in the County Urban Hierarchy. As with Blanchardstown Village, under a review of the County Retail Hierarchy, Castleknock is more appropriately designated as a Metropolitan Area Level 4 Traditional Suburban Village Centre. There has been an increase in retail floorspace since the GDA Retail Strategy floorspace survey with a number of new units having opened on Main Street, the Castlecourt Centre and along Laurel Lodge Road. However, given Castleknock's location and form, it has limited potential for

any major increase in retail floorspace over the timescale of the Strategy.

Corduff Shopping Centre

5.22 Corduff Shopping Centre is a small and very poor circa 1970s purpose built local centre located within a predominantly local authority housing area. It is a Level 4 Neighbourhood Centre within the GDA and County retail hierarchies and a Suburban Neighbourhood Centre in the County Urban Hierarchy. Whilst earlier it would have been an important centre and resource in the community, it suffers from the following:

- Few trading retail outlets and a very high level of vacancies
- Absence of an anchor convenience store
- A poor out dated design with little attraction for modern operators
- Very poor immediate environment with evidence of considerable vandalism and litter
- No recent investment and upgrading
- Lack of market interest reflected in the high level of vacancies
- Proximity to better centres, including Blanchardstown Shopping Centre.

5.23 For all its problems, Corduff Shopping Centre is well located to meet local needs and its role in the hierarchy. Again, we look to comparable centres in the UK which faced the same problems and decline and the steps that have been taken to turn these centres around and restore their role and attraction within their local communities. Whilst there are numerous examples, we have reviewed the approach adopted in a number of district centres in the North West of England. These are Cheetham Hill, Sale, Swinton and Wythenshaw in Greater Manchester and Kirby and Beechwood in Merseyside/North Cheshire respectively. We summarise the issues and responses below:

Issues

- i. Out of date and wrong sized convenience supermarket anchor store;
- ii. As a consequence of the above, lack of attraction to other occupiers; and
- iii. The effect was the deterioration of the retail offer and attraction which was followed by increased neglect, vandalism and crime resulting in almost terminal decline of the shopping centres.