

A nighttime photograph of a city street intersection. In the background, a modern building with large glass windows is illuminated, with the letters 'RSA' visible on its facade. The street is filled with light trails from cars, creating streaks of white, yellow, and red. Tall streetlights with starburst patterns illuminate the scene. A dark blue rounded rectangle is overlaid on the upper part of the image, containing the title text. Another dark blue rounded rectangle is on the right side, containing the number '3'.

Enterprise and Employment Strategy

3

Vision Statement: To encourage, support and facilitate further sustainable employment creation, economic growth and business development across a range of sectors - including retailing - by strengthening existing employment areas and revitalising town and district centres, by focusing on appropriate business support mechanisms and by capitalising upon the many inherent advantages available to the County – as evidenced by its economic profile – to improve the overall attractiveness of Dún Laoghaire–Rathdown as a vibrant place in which to set up and do business.

3.1 Enterprise and Employment

3.1.1 Trends in Enterprise and Employment

(i) Introduction

This section sets out some of the recent trends in enterprise and employment in the County and provides a general socio-economic profile of the County.

The Dublin City Region is recognised as Ireland's only internationally competitive city region. Dún Laoghaire-Rathdown, as an integral part of this City Region, must maintain a strong focus on sustaining and enhancing Dublin's attractiveness as a location in which to do business, live and work. In economic terms, the Greater Dublin Area, while constituting 40% of the nation's population, contributes over 50% of GVA (gross value added) and the continued success of the wider Metropolitan Dublin area in delivering the highest return on investment, will ultimately lead to economic growth and enhanced quality of life across the whole of Ireland.

Dún Laoghaire-Rathdown has, like all other Counties, experienced the negative effects of the significant deterioration in the national economy in recent years. Unemployment levels have more than doubled in the County and retail and commercial vacancy rates have increased. However, despite the considerable economic downturn, the County has, in relative terms, fared better than most.

While not underestimating the seriousness of the figure, the unemployment rate for the County, as measured in Census 2011 (at 11%) was the lowest unemployment rate in the State at that time. The County also registered the lowest youth unemployment rate in the Country. The overall number of jobs located in Dún Laoghaire-Rathdown

remained almost unchanged from 2006 and the County has continued to attract and retain high quality companies, both domestic and international, in the technology, pharmaceutical and the financial services sectors.

The strong national focus on economic recovery has filtered through to local government generally, and the land-use planning process specifically. The Government's proposals for reform of local government - set out in the Local Government Reform Act (2014) envisage a stronger and more explicit direct role for local authorities in promoting economic development. The 'Regional Planning Guidelines', (RPGs) which inform planning policy at County level, are to be reshaped as 'Regional Spatial and Economic Strategies' and each local authority must now prepare a 'Local Economic and Community Plan', the economic component of which will frame the broad economic policy for the County.

(ii) Employment Trends

Analysis of Census 2011 shows there were approximately 87,500 people resident in Dún Laoghaire-Rathdown who were at work. This is a decline from approximately 92,000 in 2006. The Census also records how many jobs are actually located in the County. In 2006 the number was approximately 68,000 and this figure remained largely unchanged by 2011. It should be noted that the resident population of the County increased by c.13,000 persons during this period and under more normal economic circumstances a corresponding increase in the number of jobs located in the County might have been expected.

Some employment locations have fared better than others - the number of jobs located in the Sandyford Business District for example, increased by almost 1,000, to a figure of approximately 15,000. There was also an increase in the number of jobs in



3

Dundrum (up by 1500 to approximately 4,500) and in Cherrywood (up, marginally to 2,300). There were, however, decreases in the number of jobs in Dún Laoghaire (down 700 to approximately 7,700) and the Pottery Road area (down 200 to approximately 1,800). The largest single employer in the County - UCD - remained largely unchanged at circa 5,500.

In terms of the resident labour force, the results of the Census confirmed the continuing trend in the County towards a high proportion of managers/professionals among the labour force. The County had the highest proportion (25%) of persons classified as ‘Socio-Economic Group A (Employers and Managers)’ within the State.

When assessing the characteristics of the labour force in Dún Laoghaire-Rathdown, two elements stand out: the relatively low participation rate and the relatively positive ‘jobs ratio’. The Census shows the County’s labour force participation rate is 58%. This is the lowest participation rate of the four Dublin Authorities (with Fingal having a rate of 70%). This relatively low participation rate is primarily due to (i) the number of persons in the retired age cohorts, and (ii) the relatively large proportion of third level students in the County.

At a Regional level, a good indicator of the imbalances that exist between the location of the labour force and the location of jobs in the GDA is the ‘jobs ratio’. The ‘jobs ratio’ is the total number of jobs divided by the labour force. The jobs ratio is used as an indicator to measure the sustainability of settlements, and although very little research has been undertaken on this issue, it has been suggested that on sustainability grounds, the ratio should not fall below 0.7. The ‘jobs ratio’ for Dún Laoghaire-Rathdown is 0.8.

A number of indicators would tentatively suggest a gradual economic recovery is underway at the time of drafting the Plan. The unemployment numbers in the County, which peaked in 2009, have been in persistent decline since then. For example, in the Dún Laoghaire Social Welfare Office, the numbers on the Live Register peaked at over 8,000 in 2009 and stand at just over 6,000 in Quarter 3 2014. Nationally, the ESRI forecasts economic growth of 5% for 2015 – compared to growth rates of between 1% and 3% observed in recent years. A consequence of this significant growth in output and employment, according to ESRI, will be a further fall in unemployment - the unemployment rate should be down to under 10 per cent of the labour force in 2015. The ESRI note that after a “long period of attrition”, the economy is approaching the end of “the very painful period of fiscal adjustment”.

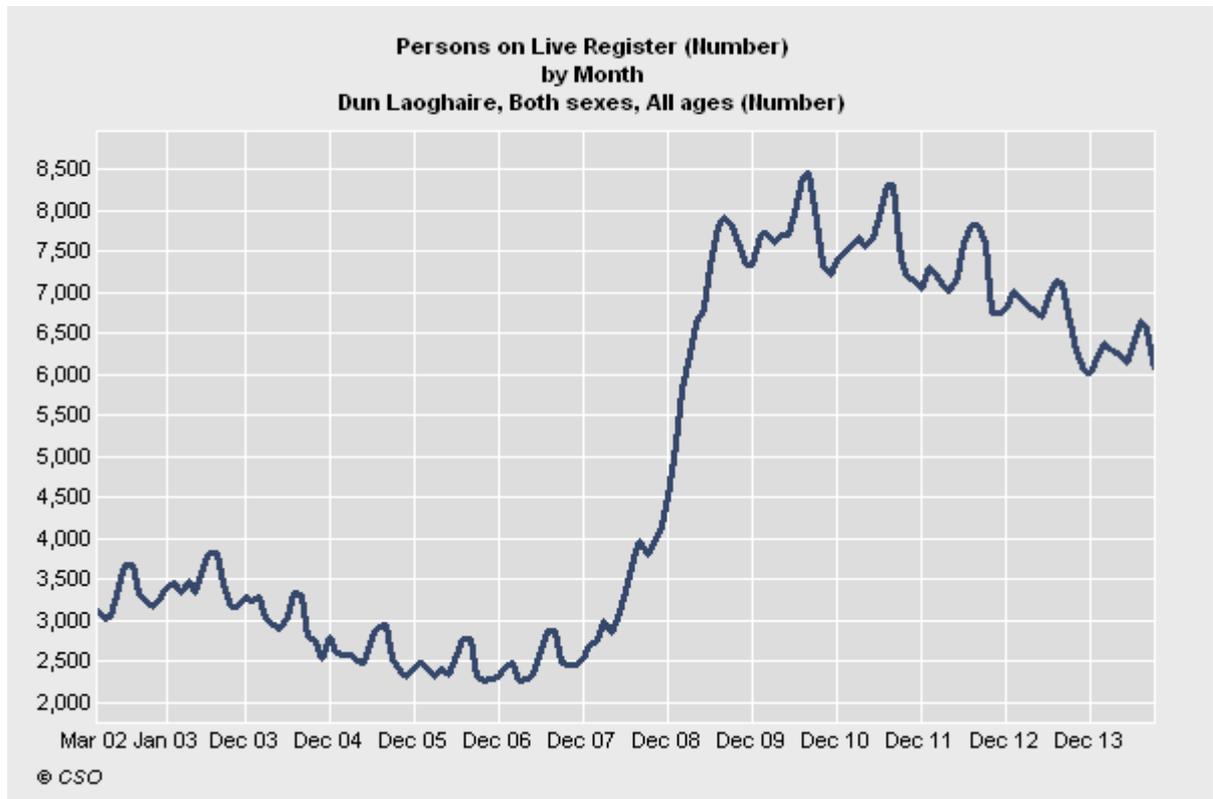
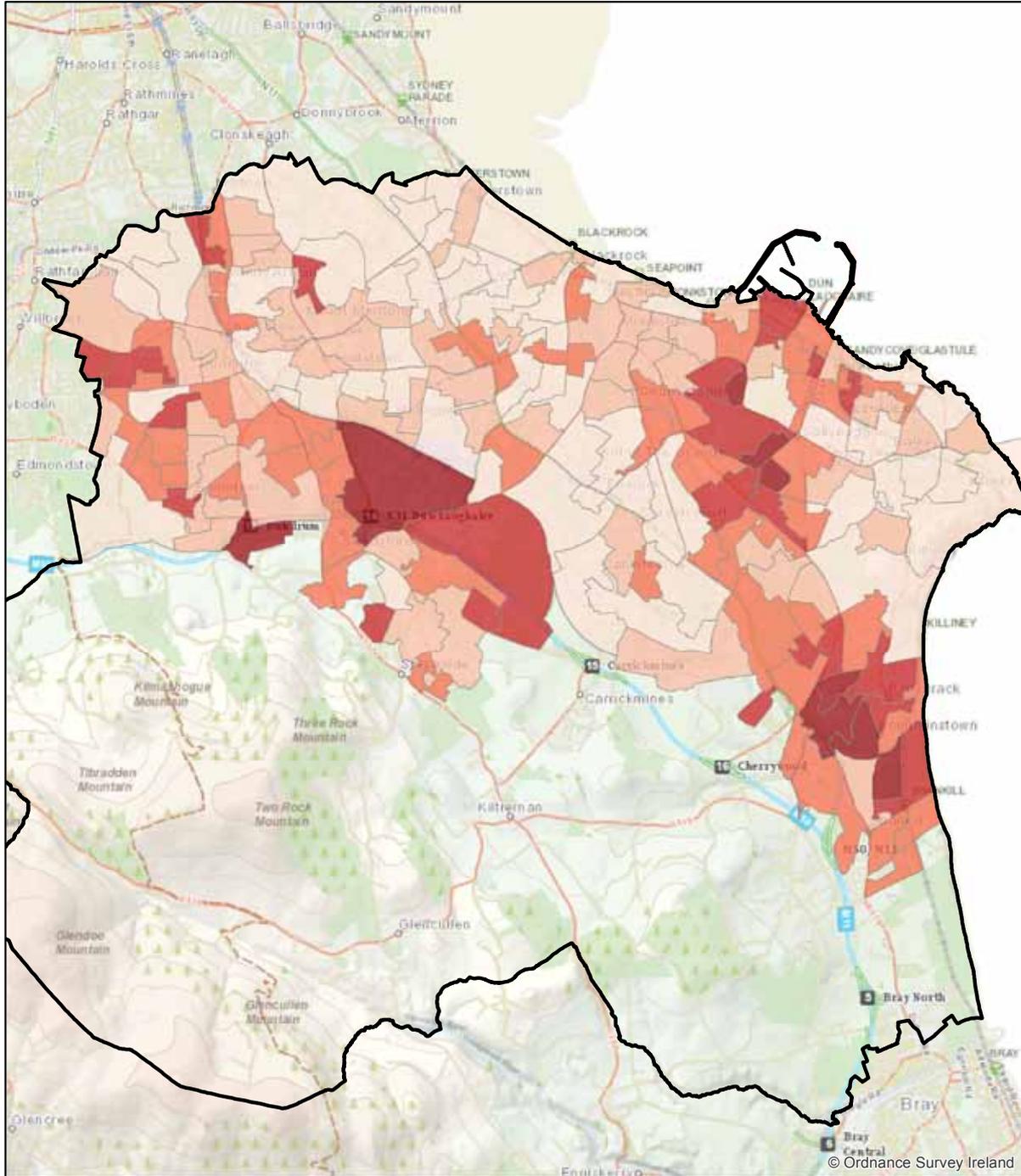


Figure 3.1: Persons on Live Register

A recent mapping of the Live Register was carried out by Southside Partnership DLR, in conjunction with the All Island Research Observatory. The mapping exercise

shows the concentration of unemployment across a number of discrete neighbourhoods in the County.

Live Register per 1000 of Population



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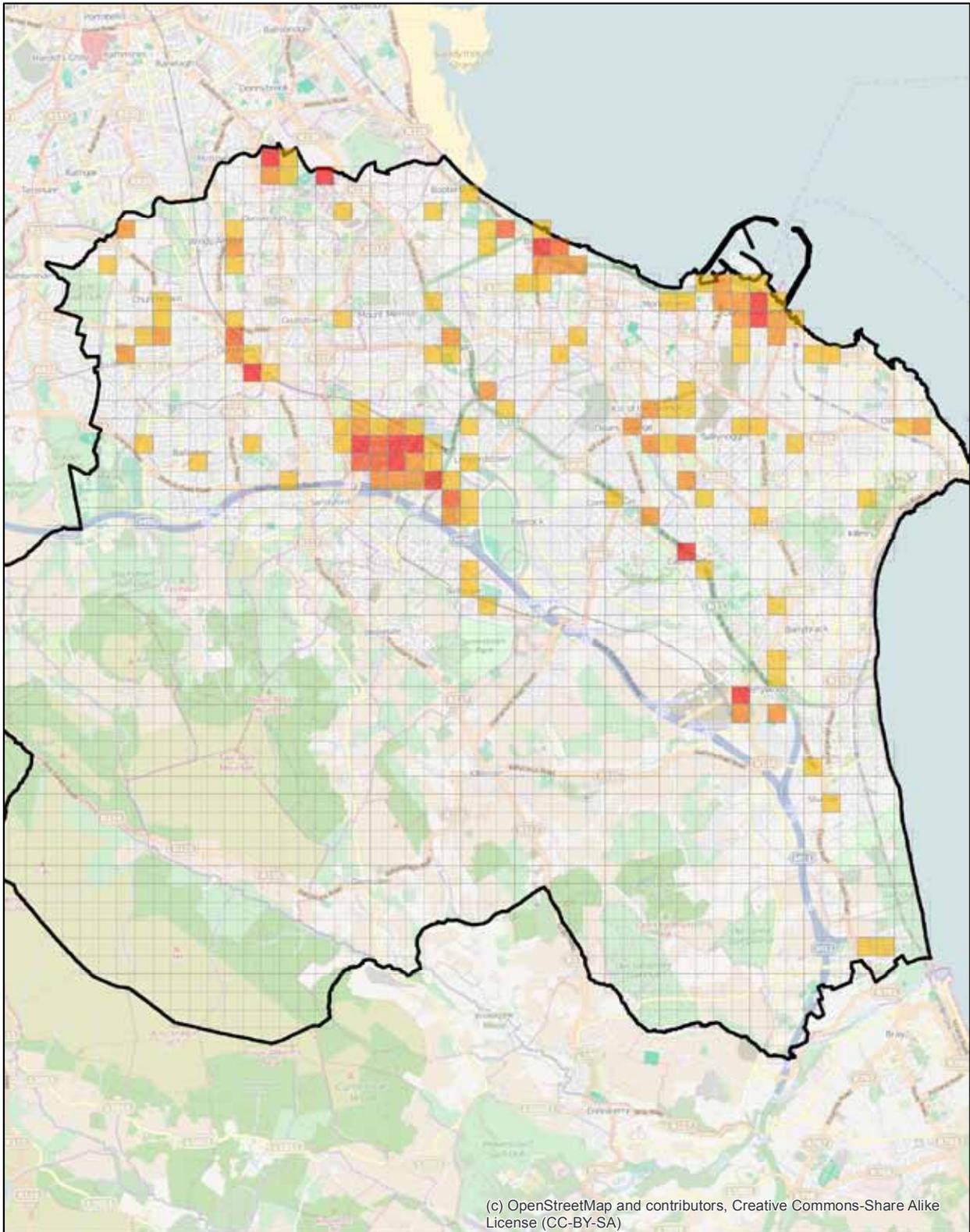


PL-14-367 Live Register

Data courtesy of Southside Partnership and AIRO

Figure 3.2: Live Register Per 1000 of Population

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Main Locations of Employment in Dun Laoghaire Rathdown

- 101 - 300
- 301 - 700
- 701 - 1000
- 1001 - 2838

0 0.5 1 2 Kilometers



Number of Jobs per 250 metre Grid

PL-14-368 POWSCAR 250

Figure 3.3: Main Locations of Employment in Dún Laoghaire-Rathdown

(iii) Local Economic and Community Plan

A new structure at local authority level - the Local Enterprise Office (LEO) - has emerged since the last County Development Plan. The LEO embraces the functions of former City/County Enterprise Boards and local authority Business Support Units. The Local Enterprise Office will be a key element of the local government role in economic development in the coming years - over 95% of the c. 250,000 businesses in Ireland are SMEs employing less than 10 people, and this will be the core client base of the new LEOs. It is intended that the LEOs will act as a 'one-stop-shop' for the micro-enterprise and small business sector, delivering direct enterprise support and coordinating access to other services for business.

Guiding the work of the LEO will be the 'Local Economic and Community Plan', (LECP) which will be prepared and published by the Council in the near future.

The focus of the economic element of the LECP, as set out in legislation, will be on "creating and sustaining jobs" and "promoting the interests of the community", including:

- Enterprise and economic development across a range of economic sectors.
- Foreign Direct Investment.
- Indigenous industry.
- Micro, small and medium sized enterprises.
- Tourism.
- Agriculture, forestry and the marine, and other natural resource sectors.

The Plan must also involve "supporting enhancement of local innovation capacity, including investment in research and development capacity, technology transfer, up-skilling and re-skilling and identifying economic potential and the requirements to realise it."

A priority of the LECP will be to articulate strategies and actions that will guide future development and resilience of towns and commercial areas taking into account the increased competition in the retail and office sectors, the impact of new technologies and the imperative to develop in a sustainable way and minimise environmental impacts.

In due course, it is anticipated that there will be a very close alignment between the strategic spatial objectives of the County Development Plan and the enterprise/business focussed objectives of the Local Economic and Community Plan.

(iv) Sectoral Trends in Recent Years

Trends in employment and enterprise/economic development which have been observed over the last number of years and which, subject to the current economic situation, are likely to continue for the duration of the Development Plan include the following:

- The majority of new jobs continued to be created in services rather than manufacturing. The gradual relocation of light industrial uses from the Sandyford Business District area has been a noticeable trend. The growth of this sector in Wicklow suggests a deflection from the Dublin area to outlying Counties.
- Local services, health care, leisure, tourism and retail sectors will become even more significant to the economy as the population ages and disposable incomes rise.
- Key growth sectors in the economy of the Dublin Region over the medium term are predicted to be as follows:
 - Retail/leisure.
 - Financial services.
 - Culture/tourism.
 - Education/Research and Development.
 - Health.
 - Software/I.C.T.

(v) Commercial Development and Land Use Trends

A key objective of the Plan is to ensure that sufficient serviced lands are available for employment generation and the plan-making process must include the assessment of the adequacy of the existing employment zoned lands and consider whether additional lands may be required to meet employment needs over the Plan period.



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Employment in the County is concentrated in Major Town Centre/District Centre lands and in the various Employment zoned lands. As detailed previously, there are approximately 68,000 jobs located in the County. Relatively speaking, however, only a minority of these are located in pure ‘Employment’ zoned lands - just under 20,000. As context, there are more than 11,000 jobs located in the two ‘Major Town Centres’ - Dún Laoghaire and Dundrum - and circa 7,000 jobs located in ‘District Centre’ lands.

The relative scale of Dún Laoghaire-Rathdown’s Employment zoned lands is low in the context of the other Dublin Authorities. There is a total of almost 300 hectares of employment lands within the County - only 60 hectares of which is greenfield, undeveloped land. Fingal County Council, by comparison, has a total of almost 2,700 hectares of employment land and South Dublin County Council a total of c.1,600 hectares. The employment lands in Dún Laoghaire-Rathdown have, however, a much higher ‘job density’ on average yet, despite having a far smaller quantum of specific Employment zoned lands, the disparity between DLR and the other Dublin Authorities in terms of overall job numbers is not significant. The number of jobs located in Fingal is approximately 79,000 and in South Dublin 77,000.

(vi) Demand for Employment Zoned Lands

While the RPGs do not provide specific growth estimates for employment across the GDA, an analysis

provided by the National Transport Authority in their “Greater Dublin Area Draft Transport Strategy - 2030 Vision” uses an employment forecast that assumes the 2006 ratio of employment-to-population will remain constant up to 2030 at national and GDA level. This means that for the GDA an increase in employment of 39% over 2006 levels is expected.

The main areas of presently undeveloped employment zoned lands (zoned Objective ‘E’) are in

- Cherrywood (40ha).
- Carrickmines (adjacent to ‘The Park’) (20-25ha).
- Old Conna (some potential employment zoned lands).

The Core Strategy of this Plan has concluded that the substantial quantum of undeveloped Objective ‘E’ zoned lands is sufficient to meet the estimated demand over the lifetime of the Plan.



3.1.2 Strategy, Policies and Objectives

Strategy

The strategic vision of this Plan is to support and facilitate the economic development of the County across a range of sectors while acknowledging in particular the growing importance of the knowledge economy and the historic problem of unemployment blackspots in the County. The focus on employment creation will be based on consolidating the strong job generation capacity of high technology and knowledge based industries and the need for starter/incubator units to promote small to medium enterprise. It is an objective to provide for a wide range of employment needs to ensure that people with a diverse range of skill levels can both find and help grow employment opportunities in the County.

To generate sustainable economic growth, towns and cities need to be attractive places to live and work. This provides a broad agenda including everything from public transport, general affordability, cultural and recreational facilities, and the general quality of the environment. Office space needs to continue to be reconfigurable and flexible to facilitate growth. There is a need to develop premium office accommodation suited to top end, high value business activities. These are the activities most likely to be located in Ireland as low cost transactional activities move to lower cost locations abroad.

A shift from 'high-volume jobs' to 'high-value jobs' is likely within the County as companies seek to move up the value chain and undertake higher value-added activities in Ireland. To support this, there is a need for the development of more specialised skills and expertise with a particular focus on the development of competences in innovation, product development and research and development.

The Council will seek to work in conjunction with other Government and State agencies, to support and facilitate job creation programmes and socially useful and sustainable local industry.

3.1.2.1 Policy E1: Lands for Employment Use

It is Council policy to ensure that sufficient serviced lands continue to be available for employment generation.

There remains a substantial quantum of undeveloped Objective 'E' zoned lands – circa 60 ha, located in predominantly Cherrywood and Carrickmines, with significant 'brown-field' commercial redevelopment potential existing in the Sandyford Business District. While some of the undeveloped lands remain currently unserved, infrastructural programmes

have commenced or are at an advanced design stage, which will unlock the development potential of these lands. In this regard it is considered that a sufficient quantum of 'Enterprise and Employment' zoned lands is available to facilitate continued economic development and employment growth in the County over the Plan period.

The Council will support the continued redevelopment and densification of Sandyford Business District to provide for high quality office accommodation, along with supporting facilities such as crèches, public restaurants/cafes and amenity areas for employees and visitors.



3.1.2.2 Policy E2: Knowledge Economy

It is Council policy to promote the development of knowledge-based enterprise in the County.

The Council will liaise with Enterprise Ireland, the IDA, Forfás, the County's Third Level Institutions and other relevant organisations to identify opportunities in Dún Laoghaire-Rathdown for the promotion of research and development/innovation and, in particular, to promote the location of new industry in the County that is generated from innovation processes.

It is Council policy to promote the rollout of high speed broadband, in particular next generation networks, to support knowledge-based enterprises.

3.1.2.3 Policy E3: Creative County – Culture and Creative Industries

It is Council policy to promote the development of creative enterprises in the County.

Cultural and creative industries, as a subset of the knowledge economy, are an increasingly important area of economic growth and employment creation. They have been defined as industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through

the generation and exploitation of intellectual property - including areas such as advertising, software, publishing, architecture, music and the visual and performing arts, film, video and photography. This has led to the emergence of the concept of 'creative cities'. There is a growing movement internationally by cities to become recognised and organised as creative cities. In this respect, the location of Ireland's only institute of art, design and technology - IADT - in the County is a significant asset. IADT's strategic vision is to be at the forefront of research and innovation at the convergence of the arts, technology and enterprise, in a way that maximises its contribution to the County and the County's creative economy.

to the wider community. The Council will support the efforts of UCD to continue to develop as a world-class university and will support the IADT in its mission to become the leading Irish educator for the knowledge, media and entertainment sectors.

It is Council policy to encourage the development of science and technology-based enterprise in Dún Laoghaire-Rathdown. Science and technology-based enterprise comprises knowledge-based processes and industrial activities in which research, innovation and development play a significant part and which lead to and accommodate the commercial production of a high technology output. Science and technology based enterprises have formal and operational links with Third Level educational institutions or research centres and encourage the transfer of technology and business skills. The Council will encourage the establishment of Further and Higher Education Institutes where appropriate to build on and expand research, innovation and development activity in the County.

The 'Third Level Institution' (TLI) zoning objective recognises and facilitates the increasingly diverse array of uses on Third Level campuses.

The Council acknowledges the importance of Colleges of Further and Higher Education in the County. These colleges provide important training and skill for students of all ages and are often a stepping stone to third level education. They are one of the few places where adults can return to college to attain an education from almost all of the disciplines. The Colleges are also of direct importance to employment in the County as many teachers and tutors commute to or move into the locality for work purposes.

The Council will work with all educational institutions to ensure their full development, to encourage the establishment of any new colleges and allow for the development of student accommodation in accordance with Policy RES12 'Provision of Student Accommodation'.

3.1.2.4 Policy E4: Further and Higher Education Institutions

It is Council policy to work in conjunction with Further and Higher Institutions in the creation and fostering of enterprise through research, innovation and development activities and the commercialisation of such activities.

Strong evidence exists internationally to suggest that successful cities are those that achieve strong linkages and synergies between their universities and businesses (Stanford – Silicon Valley, being the obvious example). The Council has been closely involved in UCD's ongoing plans to develop the campus – including significant additional incubator/office space to commercialise hi-tech research projects like the 'Belfield Innovation Park' and the 'Gateway' project, which will introduce a greater mix of uses on the campus – including commercial offices/hotel/cinema/leisure/retail - to 'open up' the campus



Science building UCD

3.1.2.5 Policy E5: Education and Skills

It is Council policy to sustain the existing high levels of educational attainment and skilled workforce, to encourage employment generation to maintain this resource within the County and to promote the availability of education opportunities to all residents in Dún Laoghaire-Rathdown.

A well-educated and skilled workforce is a valuable human resource, which will provide an attraction for inward investment and will promote the County as a leader in the knowledge economy. With most city regions now becoming more knowledge intensive, the challenge for Dún Laoghaire-Rathdown is to ensure that the County is at the forefront of this transition to a competitive knowledge based economy. The continuing presence and growth of excellent Further and Higher Education Institutes and research and



Central Park, Sandyford

development nodes in the County will be critical to ensuring success.

3.1.2.6 Policy E6: Tackling Unemployment Blackspots

The Council acknowledges the importance of technical education and the trades in the County. It is Council policy to support the work undertaken by the Education and Training Boards in relation to courses provided under SOLAS and establishment of Community Training Centres, Local Training Initiatives and Specialist Training Provision in the County.

It is important to note that areas of high unemployment, specifically among the younger population, do not always benefit from a focus on Further and Higher Education, jobs in the IT sector or enterprise and would benefit more by the provision of the above types of training and skill development as well as traditional forms of employment via the public sector.

3.1.2.7 Policy E7: Light Industrial and Related Uses

It is Council policy, when determining planning applications on industrial sites, to consider the employment-generating value of light industry areas in the County and the value of maintaining an adequate supply of light industrial space and employment in order to help ensure a diverse range of employment opportunities in the County.

There continues to be a need for a diverse range of employment opportunities in Dún Laoghaire-Rathdown despite the increasing move towards 'knowledge based' activities - particularly in the context of high levels of employment at specific locations/nodes. Manufacturing industry employs in the region of 5,600 people in the County and while it is acknowledged that trends over time suggest there

will be ongoing decline of traditional manufacturing sectors, it is considered, nevertheless, that there should continue to be adequate provision for light industrial activities.

3.1.2.8 Policy E8: Residential Use in Employment Zoned Land

It is Council policy to achieve a satisfactory balance with regard to the residential component of development on lands zoned Objective 'E' to ensure that such lands remain available to facilitate their primary objective for the lands which is the encouragement of enterprise and the creation of employment. Generally, any residential development proposals on 'E' zoned lands should ensure that the employment element on site in terms of floor space should be no less than that on site prior to redevelopment and must ensure that the employment element on site in terms of overall floor space remains the primary land use.

The Plan has a central tenet of 'planning for the knowledge economy' – that is, the importance of planning 'people places' rather than environments solely to attract business. The land-use zoning objective for employment lands must be flexible enough to reflect this new mixed-use context, whilst reinforcing the primacy of the employment use.

An element of residential use in employment zoned areas may be considered in appropriate locations where a proposed development makes a positive contribution to the area in terms of adding to the richness and diversity of uses. The appropriate location for residential use would generally be in close proximity to public transport nodes and adjacent to facilities such as shops, crèches, restaurants and hotels and other community infrastructure.

3.1.2.9 Policy E9: Sandyford Business District

It is Council policy to implement the Urban Framework Plan for Sandyford.

The 'Sandyford Business District' refers to the combined Sandyford Business Estate, Central Park and the South County Business Park area. Since 2000, the area has experienced significant high density development, including residential development, as part of mixed-use schemes that also include comparison and convenience retail uses and other retail services such as banks, hair and beauty salons, bookmakers and off-licences. In response to the changing nature of the Sandyford Business District and the fact that Census 2011 revealed that the resident population of the Business District is now almost 3,000 persons, it is considered appropriate to allow for continued development of residential uses and the associated uses required to serve this population in order to create a coherent urban form. However, it is also considered that the Sandyford Business District should remain the primary employment centre in Dún Laoghaire-Rathdown and, while the policies and objectives for the future development of Sandyford contained in the Urban Framework Plan allow for a mix of uses, the emphasis remains on promoting the area as a major employment node.

3.1.2.10 Policy E10: Enterprise Incubator Units

It is council policy to promote and assist in the provision of enterprise centres in association with other agencies and in the context of local need.

The availability of adequate incubator space for enterprises in the early stages of development should be part of the enterprise infrastructure in Dún Laoghaire-Rathdown.

The Council, through the LEO, will liaise with the public sector enterprise support agencies, with voluntary community development groups and with business organisations in Dún Laoghaire-Rathdown to facilitate the provision of suitable premises for such enterprises. In addition, major commercial planning applications located in employment zoned areas, may be required to provide for incubator/starter units within the development.

3.1.2.11 Policy E11: Office Development

It is Council policy to facilitate significant office development in commercial and employment centres. The appropriate locations for office development would generally be in Major Town Centres, District Centres, and Employment zoned areas.

Office developments will generally be considered appropriate in Major Town Centres, District Centres

and Employment zones. In District Centre areas, office development will be assessed in accordance with relevant development management standards and on the size of the proposal in comparison to the size of the centre, the need to ensure a variety of uses in the centre to fully serve its catchment area and the capacity of the centre to absorb any such proposal. These locations should be well served by existing and/or proposed public transport facilities in line with the principles of sustainable development. The Sandyford Urban Framework Plan contains specific policies for the Sandyford Business District in relation to commercial office development

The Council will encourage the conversion of existing office stock, where appropriate, to be more receptive to the changing needs of employers and employees. In this regard, the establishment of high specification 'fourth generation' office accommodation will be especially encouraged.

3.1.2.12 Policy E12: Home Working/ E-Working

It is Council policy to permit home-based economic activities where, by virtue of their nature and scale, they can be accommodated without detriment to the amenities of residential areas and to promote and encourage the development of 'Live-Work' units capable of accommodating home-based economic activities in areas of high density development at sustainable development locations in the County.

The Council acknowledges the growing trend in 'e-working' or home-working, which can contribute to a decrease in the demand for commuting-related travel. Proposals for use of the home as a workplace will be controlled through the development management system in order to ensure the development can be integrated without detriment to the amenities of residential areas.

3.1.2.13 Policy E13: Helipads

It is Council policy to facilitate the provision of a helipad facility at the major employment cores in the County. The preferred option is for a collective facility to serve multiple users in order to avoid the proliferation of such facilities.

The Council recognises the role that helipad facilities can play in adding to the attractiveness of employment areas for large companies. There can be detrimental impacts from helipad facilities on adjacent residential areas in terms of noise nuisance and any such proposals would have to be carefully assessed in this regard. Any such facility would also have to adhere to best practice in safety regulation as laid down by the Irish Aviation Authority (IAA).



Queen Mary 2 Cruise Ship, Dún Laoghaire

3.1.2.14 Policy E14: Tourism and Recreation

It is Council policy to co-operate with the appropriate agencies in promoting sustainable tourism and securing the development of tourist and recreation orientated facilities in the County.

The Council recognises the employment potential of tourism and recreation in the local economy. The Council will co-operate with the appropriate agencies in promoting sustainable tourism and securing the development of tourist and recreation orientated facilities in the County.

Dún Laoghaire has been designated as a centre for marine-related tourism under the National Ports Policy. The strong growth in cruise tourism in the town has the potential to deliver a significant economic benefit to both the town itself and the wider County. The cruise business is a growing market sector in the tourism industry and Ireland has recently begun to capitalise on this market and has succeeded in attracting a growing number of visits by cruise liners. Dún Laoghaire has been important to attracting these cruise calls, and in 2015, Dún Laoghaire Harbour Company estimate that over 100,000 passengers/crew will visit the town as part of their cruise tour.

It is Council policy to continue to work in collaboration with other key stakeholders to implement the programmes and plans of the GROW Dublin initiative over the lifetime of the Plan to maximise the tourism potential of the County. Established in 2012 to focus on the marketing and branding of Dublin city and region, the Grow Dublin Tourism Alliance has been tasked with the role of identifying how the city and county could deliver substantial growth based on tourism by 2020. The forum is a major collaborative initiative by the key interested parties including the Dublin Local Authorities, Fáilte Ireland, Dublin Chamber of Commerce, and the tourist industry & development organisations. 'Dublin' in the context of the Alliance's

remit refers to the wider Dublin region comprising Dublin City Council and South Dublin, Fingal and Dún Laoghaire-Rathdown County Councils. The report, 'Destination Dublin - A Collective Strategy for Growth to 2020' was launched in 2014.

The report states the Dublin Region needs to differentiate itself as a 'must-visit' destination. As trips become shorter, particularly to cities, Dublin must distinguish itself as a stand-alone destination and an aspirational European short-break destination. If the variety and vibrancy of the City and County, attractions can be communicated to potential visitors in key target markets, this is where return on investment is likely to be greatest.

The Alliance has identified five key sectors that offer the best potential for significant growth and the best return on investment:

- Holidaymakers identified as 'Social Energisers' - young couples and adult groups looking for excitement, new experiences, and fun, social getaways to novel destinations;
- Holidaymakers identified as 'Culturally Curious' - mostly older couples or solo travellers with time (and money) to spend - sightseers looking to explore new places and broaden minds;
- Business Tourism - where visitor expenditure is amongst the highest of all visitors and who are more prone to visit in the shoulder and off-season times when cash flow for Dublin businesses is critical;
- Cruise Tourism - who come to the Dublin Region as part of a European cruise;
- Event Tourism - coming to the Dublin Region specifically to attend an event or festival, whether sporting, cultural, business or any other type of event.

The tourism potential of the Dublin Mountains, as a recreational hiking/cycling destination, is significant. The Dublin Mountains Partnership, of which the Council is a member, was established to develop an integrated outdoor recreation plan for forests and other public/state-owned lands with the ultimate aim of improving the recreational experience for users of the Dublin Mountains. The flagship project of the Partnership was the establishment of a long distance trail, the Dublin Mountains Way, across the mountains from Shankill to Tallaght.

The Council will encourage the development of the tourism potential of the DART and Luas Green Line to facilitate and attract 'day trippers' from Dublin City and elsewhere to visit either the coastal areas of the County or its inland upland areas. The tourism potential of the County's Diaspora is recognised as an important area for development. Accordingly, the Council will encourage the development of heritage, genealogical and cultural tourism products and facilities in the County. The Council will encourage and support the enhancement of the tourism potential of the Dublin Mountains Way including promotion of public transport linkages including Bus, DART and Luas and the use of public rights of way as far as possible.

3.1.2.15 Policy E15: Rural Development

It is Council policy to facilitate the development of acceptable rural enterprises and to minimise pollution from agricultural and industrial sources by means of development management and water pollution legislation.

Development Management policy focussed on the rural areas of the County provides for the development of rural enterprise, related to the area's amenity potential and many enterprise/employment uses are either 'Open for Consideration' or 'Permitted in Principle' in the rural areas of the County. The Planning Authority must balance the requirement to protect the sensitive nature of the rural area with the requirement to ensure enterprise development.

3.1.2.16 Policy E16: Commercial Leisure

It is Council policy to ensure that all major commercial leisure developments are located in accordance with a sequential test approach. The priority will be Major Town Centre locations, then District Centres and Neighbourhood Centres. Commercial leisure uses may also be considered in Employment zones. The availability of a choice of sustainable transport modes will be essential.

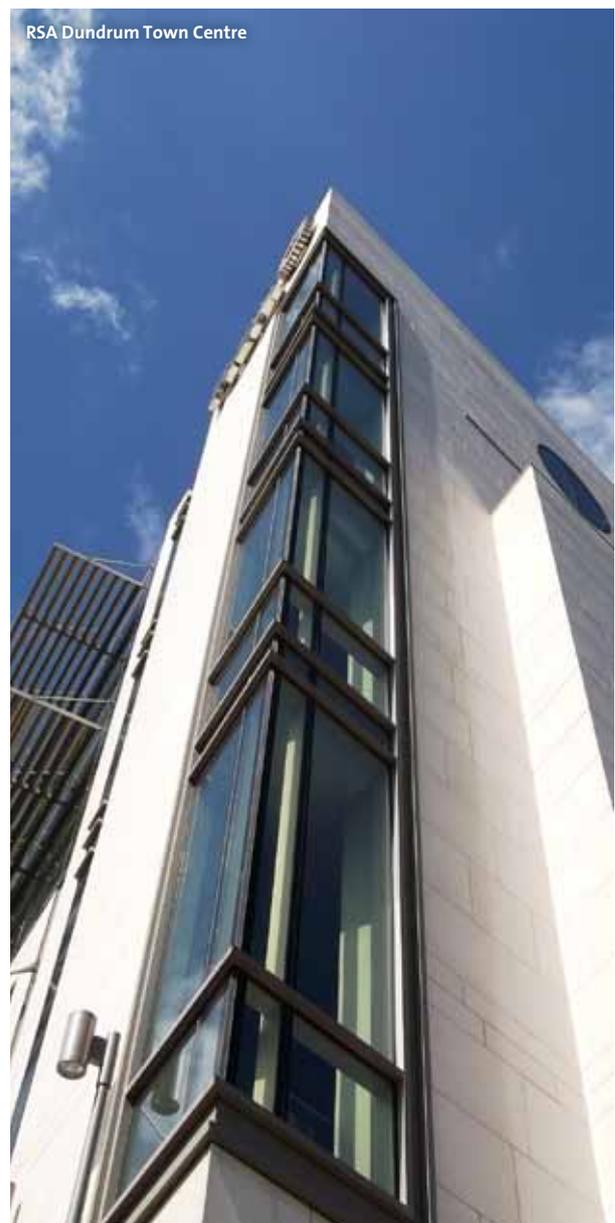
Commercial leisure facilities are those run on a profit basis and include cinemas, family entertainment centres such as bowling, indoor children's play centres, fitness centres, gyms, swimming pools etc. Commercial leisure facilities generate a high level of movement and are best located in places that

offer the highest levels of accessibility to a range of transport modes, in particular public transport.

3.1.2.17 Policy E17: Equine Industry

It is Council policy to support the government commitment to the horse industry in Ireland and to promote and support and facilitate the development of the equine industry in Dún Laoghaire-Rathdown County in particular and to promote Dún Laoghaire-Rathdown as a centre of excellence for the bloodstock industry.

The Council recognises the increasing importance of the equine industry in Dún Laoghaire-Rathdown County, particularly the positive contribution that the industry makes towards agricultural diversification and rural employment in the county. In this context special consideration will be given to facilitate provision of residential accommodation on site in association with the development of horse breeding or equine facilities.



RSA Dundrum Town Centre

3.2 Retail and Major Town Centres

3.2.1 Introduction

Nationally the economic downturn and constrained consumer spending over the last six years has led to a very significant decline in the retail sector and in new retail developments. This County has not escaped these negative impacts on the retailing sector during the recession. There have, however, been some exceptions, most notably the continuing growth of the Dundrum Shopping Centre and the buoyancy of the retail park in Carrickmines.

There are some signs of slow improvement in the macro economy with employment rising and the household savings ratio falling, leading to an increase in household disposable incomes. Coupled with this, the Retail Sales Index (RSI) statistics published by the Central Statistics Office indicates more positive consumer sentiment and improved retail sales since the all time low in 2012. At that time the RSI was at 92.1, a fall of 21% below the 2007 peak of 116. By

July 2014 the RSI had risen to 102.9 representing an increase of 11.7% over two years. In addition the KBC/ESRI Consumer Sentiment Index was at a seven year high in mid 2014. The graphs below represent the changes in these indices since the peak period in 2007.

In terms of strategic guidance the Greater Dublin Area Retail Strategy 2008-2016, which provides much of the basis for retail planning in the County, is unfortunately well out of date having been formulated from information derived from the 2006 Census. The intervening period has seen fundamental changes in the economic and demographic situation both nationally and locally and more current information is available from the Census 2011. An updated Retail Strategy for the GDA is urgently required but indications are that any new, updated regional guidance to be prepared by the new Eastern and Midlands Assembly is unlikely to be forthcoming before 2016.

3

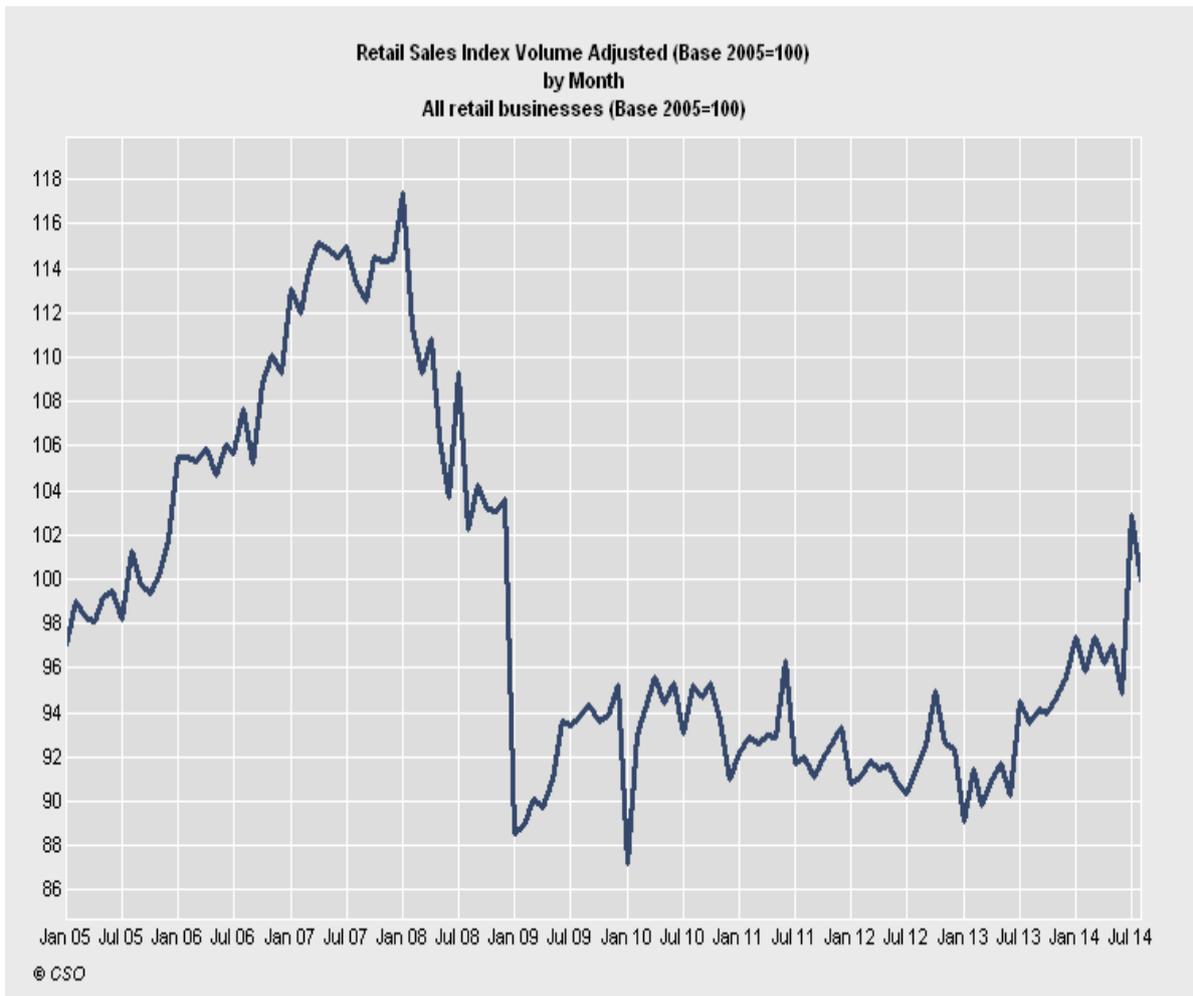


Figure 3.4: Retail Sales Index Volume

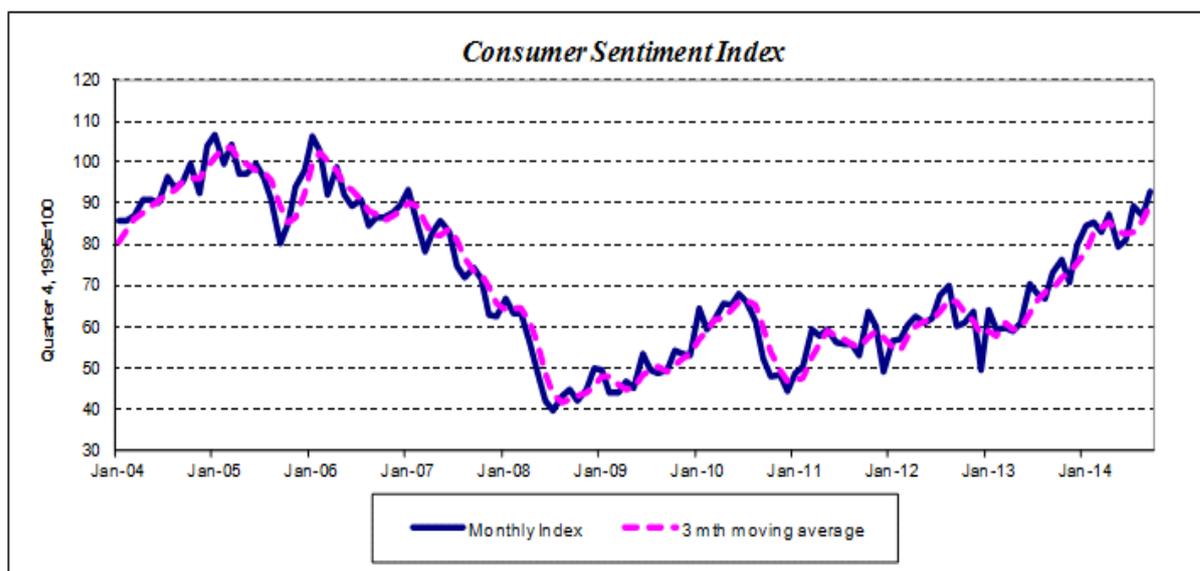


Figure 3.5: Consumer Sentiment Index

3.2.2 Strategic Context

3.2.2.1 Policy RET1: Retail Planning Guidelines

It is the policy of the Council to have regard to the 'Retail Planning Guidelines for Planning Authorities' published by the Department of the Environment, Community and Local Government in 2012, in determining planning applications for retail development.

These Guidelines identify five key policy objectives to be progressed by planning authorities. These are:

- Ensuring that retail development is plan-led.
- Promoting city/town centre vitality through a sequential approach to development.
- Securing competitiveness in the retail sector by actively enabling good quality development proposals to come forward in suitable locations.
- Facilitating a shift towards increased access to retailing by public transport, cycling and walking.
- Delivering quality urban design outcomes.

3.2.2.2 Policy RET2: Greater Dublin Area Retail Strategy

It is Council policy to have regard to the Retail Strategy for the Greater Dublin Area 2008 – 2016 but to adopt a cautionary position in relation to consideration of future retail floorspace requirements and objectives in light of changing economic circumstances.

The continuing validity and currency of the Strategy, which was originally crafted using now outdated 2006 Census data - and at a time when the economic and fiscal landscape of both the State and the GDA were fundamentally different - is now somewhat debateable. At the time of its publication - and in recognition that the economic and demographic criteria informing the Strategy would almost certainly change over time - the Strategy recommended that it be reviewed and updated every two years in order to respond to changing economic circumstances. The Strategy was published in June 2008 but no biennial reviews have been undertaken to date.

The GDA Regional Authority, which originally published the Retail Strategy, was disbanded in June 2014 and has been replaced by a new, and much larger, Eastern and Midlands Regional Assembly. This new body will be responsible for preparing the successor document to the Retail Strategy. Unfortunately, however, any such replacement document is unlikely to be published in time to inform or input to this County Development Plan process.

Notwithstanding the existing Greater Dublin Area Retail Strategy within which local planning authorities are obliged to operate does seek to set out a co-ordinated and sustainable approach to the assessment and provision of retail within the Greater Dublin Area so that:

- Adequate and suitable provision is made to meet the needs of changing population patterns, both overall and locally, and provide for healthy competition and consumer choice.
- Retail in suitable locations is provided, integrated within existing growth areas and public transport investments.
- Significant over-provision, which would place more marginal locations under severe pressure and

undermine sustainability driven policies aimed at revitalising town centres, is avoided.

The Strategy sets out the following retail hierarchy for the GDA Metropolitan and Hinterland Areas.

Levels	Centres	Locations
Level 1	Metropolitan Centre	Dublin City Centre
Level 2	Major Town Centres	Dún Laoghaire and Dundrum
Level 3	Town and District Centres	Stillorgan, Blackrock, Nutgrove, Cornelscourt and Cherrywood

The Strategy makes specific policy recommendations for Dún Laoghaire-Rathdown including:

- To support the future vitality and viability of the main retail centres in the County and to facilitate a competitive and healthy environment for the retail industry of the future, while reinforcing sustainable development.
- To maintain the two Major Town Centres (Dún Laoghaire and Dundrum) as the primary retail centres in the County. This will be reflected in the nature and scale of retail and services permitted in these centres and by the integration of leisure, entertainment and cultural facilities at both locations.
- Support the viability of existing District Centres and allow for the redevelopment and rejuvenation of ageing centres, to facilitate changing retail patterns and needs and to move away from single use sites by integrating retail provision at district level with other services, offices and residential to create vibrant centres serving the surrounding housing districts.
- To facilitate and promote the development of Cherrywood Town Centre on a phased basis as a large scale urban district centre located within a high density environment subject to the provision

of light rail links, a sufficient resident population exceeding 10,000 and the preparation of an approved urban design master plan.

- To encourage the provision and survival and modernisation of local shopping in the many villages and suburban locations across the County to allow day-to-day shopping to be met within walking distance through the protection of the retail opportunities in key local locations.

The Strategy sets out a series of policy recommendations which draws on quantitative analysis undertaken as part of the original review, examining market patterns, expenditure and future growth projections. By setting out a strategic framework for retail, the Strategy seeks to give guidance on where future retail should be provided and what issues need to be addressed.

Notwithstanding the above, there are dangers inherent in adopting a slavish adherence to the floorspace figures being articulated in the Strategy. The Strategy was initiated at a time when economic growth was still very buoyant. The future growth projections justifying fairly substantial additional floorspace over the period of the Strategy were predicated on a continued State-wide economic buoyancy and a rising consumer expenditure pattern based on relatively significant and continuing population growth in the Region for the duration of the Strategy. In essence the Strategy is based on data largely collated in the Autumn of 2006 – during a time of record housing completions, strong house price growth, high levels of in-migration by non-nationals and historically low unemployment figures. The last eight years has seen a significant reversal in most of these indicators.

The Strategy identifies the poor retail environment, uncompetitive tenant mix and inadequate space in Dún Laoghaire and recommends that opportunities for improving the existing environment should be considered. In relation to Blackrock and Stillorgan that Strategy recommends these centres be reinvented



Georges Street, Dún Laoghaire

and enhanced to bring them in line with modern retailing needs.

It is recommended that the approach to retailing and retailing floorspace in this Development Plan should be cautionary, particularly in relation to the potential adverse consequences of oversupply.

3.2.2.3 Policy RET3: Retail Hierarchy

It is Council policy to have regard to the ‘GDA Retail Planning Strategy 2008 – 2016’ and the ‘GDA Regional

Planning Guidelines 2010-2022’, in defining the retail hierarchy of the County and defining the role of the retail centres. It is Council policy to promote the viability and vitality of its existing main retail centres while continuing to protect and improve the amenity of surrounding areas.

At the heart of the Retail Strategy and the RPGs is a hierarchy of retail locations that form the basis for determining the quantum and location of new retail development. The proposed retail hierarchy and overarching strategy for each of the core retailing areas in Dún Laoghaire-Rathdown is set out below in Table 3.2.1.

Table 3.2.1: Dún Laoghaire-Rathdown Retail Hierarchy

Description	Locations	Overall Strategy
Major Town Centres	Dún Laoghaire	Consolidation of the Town Centre Quarter. Encourage the incremental growth of secondary character quarters in the remainder of the Town Centre. Refurbishment/ redevelopment of existing fabric to provide larger floor plates. Comprehensive environmental improvement and upgrade of public realm
	Dundrum	Implementation of Phase 2 of Town Centre – to include appropriate level of complementary non-retail uses and activities e.g. recreational, entertainment, cultural. Major environmental upgrade of Main Street.
District Centres	Blackrock	To encourage the potential redevelopment of the Blackrock and Frascati Shopping Centres and the consolidation of Blackrock Main Street as a mixed-use centre in accordance with an approved Local Area Plan. Any retail expansion should be limited and proportionate to the current percentage share of the overall net retail floorspace in the core retail area, as indicated in the Local Area Plan.
	Stillorgan	Encourage potential redevelopment as higher density, urban mixed-use centre in accordance with general provisions of the adopted Local Area Plan. Limited expansion of convenience and comparison retail floorspace.
	Nutgrove	Encourage potential redevelopment as higher density urban mixed-use centre. Limited expansion of convenience and comparison retail floorspace.
	Cornelscourt	Limited expansion of retail floorspace on a constrained site.
	Cherrywood	Promote a fully mixed-use sustainable town centre in accordance with the approved SDZ Planning Scheme.
Established Neighbourhood Centres	Various e.g. Ballybrack, Ballinteer, Sandyford	Promote mixed-use potential of neighbourhood centres as appropriate, subject to protection of local amenities. Limited incremental growth in retail floorspace in response to population levels.
New Neighbourhood Centres	Various e.g. Stepside, Ticknock, Carrickmines	Promote mixed-use potential of new and refurbished centres to provide for local need. Expansion in line with planned population growth.
Key Development Areas	Various e.g. Woodbrook/ Shanganagh, Kiltiernan/ Glenamuck, Cherrywood, Old Conna	Development of sustainable mixed-use urban villages in accordance with approved Local Area Plans/SDZ. Retail floorspace in line with planned population levels.

In broad terms the Strategy seeks to define the categories and types of services expected within each level viz:

- **Major Town Centres**

Full range of all types of retail services from newsagents to specialist shops and boutiques, department stores, foodstores of all types and a high level of mixed uses including the arts and culture to create a vibrant living place. Centres should be well connected and served by high quality public transport, and should be serving population catchments in excess of 60,000 people.

- **District Centres**

These centres will vary both in the scale of provision and size of catchment depending on proximity to a major town centre but a good range of comparison shopping would be expected (though no large department store) some leisure activities and a range of cafés and restaurants and other mixed uses. They should contain at least one supermarket and ancillary foodstores alongside financial and other retail services. District Centres should generally range in size from 10-25,000 sq.m. net retail sales area catering for a population of between 10,000-40,000.

- **Neighbourhood Centres**

These centres usually contain one supermarket ranging in size from 1,000-2,500 sq.m. with a limited range of supporting shops and retail services and possibly other services such as post offices, community centres or health clinics grouped together to create a focus for the local population. These centres meet the local day-to-day needs of surrounding residents.

The GDA Retail Strategy, in recognition that there is currently more limited capacity for significant new development to be supported by growth in population and expenditure per capita criteria, cautions that there is a limited quantitative case to be put forward for the provision of new centres outside of those planned in the Regional Planning Guidelines and current Development Plans. This Development Plan fully concurs with that position.

It is considered that the well established retail hierarchy in the County is operating reasonably satisfactorily and its overall logic is well understood by the general public, retailers and developers alike.

(i) Core Retail Areas

The Retail Planning Guidelines (2012) require retail strategies to define the boundaries of the Core Retail Areas. The definition of the Core Retail Areas for each of the main centres in the County is summarised below:

- Dundrum Town Centre - Between Main Street and Dundrum Bypass and from Waldemar Terrace to Wyckham Way.

- Dún Laoghaire Town Centre - Georges Street, from Bloomfield's Shopping Centre to Corrig Avenue – the northern part of Patrick Street and the central part of Marine Road.
- Stillorgan - Lower Kilmacud Road (including Stillorgan Shopping Centre) from The Hill junction to the Overflow Carpark.
- Blackrock - Main Street to Frascati Shopping Centre and from Blackrock Shopping Centre to Carysfort Avenue.
- Cornelscourt - As per the 'DC' zoning objective.
- Nutgrove - As per the 'DC' zoning objective.
- Cherrywood - As per the Town Centre land use objective.

3.2.2.4 Policy RET4: Major Town Centres

It is Council policy to maintain the two Major Town Centres - Dún Laoghaire and Dundrum as the primary retail centres in the County. This will be reflected in the nature and scale of retail and services permitted in these centres and by the range of complementary leisure, entertainment and cultural facilities located there.

Dún Laoghaire and Dundrum are the two Major Town Centres in the County but clearly they are quite different entities. As Major Town Centres they have a role beyond simply retailing – both have a vital social, cultural and employment function that needs to be catered for in the context of their future growth.

In Dundrum the first phase of the new Town Centre has been completed and includes much needed social, cultural and community facilities which helps to enliven and animate the new Town Centre both day and night. The commencement of Phase 2, involving the complete demolition of the old shopping centre is presently on hold and when it will begin remains unclear at this juncture.



There is recognition that, in retailing terms, Dún Laoghaire cannot, and should not, attempt to compete with or mimic Dundrum. Given the elongated linear nature of the Major Town Centre in Dún Laoghaire, which extends from Cumberland Street to the People's Park, it is considered appropriate to consolidate the Town Centre Quarter. This Quarter will include George's Street - from Bloomfield's Shopping Centre to Corrig Avenue – the northern part of Patrick Street and the central part of Marine Road.

The Council will also encourage the incremental growth of secondary character 'Quarters' in the Town Centre as follows:

- Park End Quarter - George's Street Upper, east of the Town Centre Quarter.
- Seafront Quarter – Marine Road to Crofton Road/ Queen's Road (Hospital car park to the Lexlcon).
- Old Town Quarter - George's Street Lower, west of the Town Centre Quarter.

The normal range of Major Town Centre uses and functions will still be acceptable in the secondary Quarters and the emphasis will be to encourage and promote retail uses and activities appropriate to the quarter.

For the Park End Quarter this may include specialist clothing / footwear brands, boutiques / leisure fashion, specialist home stores / crafts, antiques, specialist food and restaurants.

For the Old Town Quarter this may include specialist home stores / crafts, young trend clothing / footwear brands, culture / galleries / gifts, music / books, restaurants / world cuisine and evening culture.

For the Seafront Quarter this may include leisure/ tourist/marine focus, boating equipment, gift/ souvenir/craft, galleries/tourist shops and specialist food/confectionery.

Also refer to Appendix 12 Dún Laoghaire Urban Framework Plan for more detailed information on the development of these Quarters.

3.2.2.5 Policy RET5: District Centres

It is Council policy to maintain the District Centres at Blackrock, Stillorgan, Nutgrove and Cornelscourt and to promote a mixed-use sustainable town centre in Cherrywood in accordance with the approved SDZ Planning Scheme.

The District Centres at Blackrock, Stillorgan, Nutgrove and Cornelscourt are characterised by medium or large foodstore anchors together with a range of comparison shopping. Blackrock and, to a lesser extent, Nutgrove accommodate a range of other retail services, leisure facilities and community structures. The District Centres should progressively develop as mixed-use urban centres to include a residential and commercial office component where appropriate. Development Plan and Local Area Plan policies will help guide the form of future development so that they evolve into fully functioning mixed-use, higher density urban centres with enhanced public transport, access and parking demand management. Section 3.2.6 sets out Specific Objectives for the County's four established District Centres. The future development and direction of the nascent Cherrywood Town Centre will be guided and driven by the detailed Planning Scheme approved for this Strategic Development Zone.





Marlay Markets

3.2.2.6 Policy RET6: Neighbourhood Centres

It is Council policy to encourage the provision of an appropriate mix, range and type of uses - including retail and retail services - in areas zoned objective 'NC' subject to the protection of the residential amenities of the surrounding area.

The function of Neighbourhood Centres is to provide a range of convenient and easily accessible retail outlets and services within walking distance for the local catchment population. The Council considers that, subject to the protection of residential amenities, a number of the larger neighbourhood centres are capable of being promoted as local mixed-use nodes accommodating a range of uses beyond simply retailing or retail services. The introduction of residential and a higher level of commercial office activity, for example, could 'sit' quite comfortably in many neighbourhood centre locations without detriment to local amenity. The Zoning Objective for 'NC' (Refer to Table 8.3.6 in Chapter 8.3) has consequently been amended to facilitate a more diverse range of uses than has been the case heretofore in previous Development Plans.

Two of the largest neighbourhood centres at Kiltiernan and Sallynoggin have been reduced in size. Both of these centres measured 6.7 hectares and it was considered that they would benefit from a more refined zoning to align them with the other larger neighbourhood centres in the County.

In the proposed Key Development Areas – Woodbrook/ Shanganagh, Kiltiernan/ Glenamuck and Old Conna – the type and range of facilities to be incorporated into mixed-use neighbourhood centres will be promoted through the mechanism of Local Area Plans.

3.2.2.7 Policy RET7: Convenience Shops

It is Council policy to facilitate the provision of local convenience shops in residential areas where there is a clear deficiency of retail provision, subject to protecting residential amenity.

Within residential areas, the Council recognises the need for convenience shopping provision and accepts that a neighbourhood centre may not always be available within easy walking distance. When evaluating proposals for such a use, the Council will have regard to the distance from the proposed development to existing shopping facilities and to its impact on the amenity of adjoining dwellings. Local convenience shops shall not have a floorspace greater than 100 sq.m. net.

3.2.2.8 Policy RET8: Casual Trading Areas

It is Council policy to designate sites as Casual Trading Areas in suitable locations where deemed appropriate.

In the implementation of this policy the Council will have regard to the terms of the Casual Trading Act 1995 (or as may be amended from time to time). It is also Council policy to promote organic producers and producer-only products through the provision of its 'CoCo Markets' and to promote seasonal and craft markets, including privately operated farmers markets.



Shop display, The Natural Bakery Stillorgan

3.2.2.9 Policy RET₉: Non-Retail Uses

It is Council policy to control the provision of non-retail uses at ground floor level in the principal shopping streets of Major Town Centres and District Centres and also within the shopping parades of Mixed-Use Neighbourhood Centres.

This policy will be operated through the Development Management process. It is considered necessary to control the amount of non-retail floorspace at ground level within shopping centres in order to protect the retail viability of the centre, and to maintain the visual character of the streets which can be adversely affected by the impact of 'dead frontages'. Corner sites in Major Town Centres and District Centres are considered pivotal in creating a sense of vibrancy; the nature of the use of ground floor corner retail units will be required to reflect this in the design of their frontages, the use of the premises, and where feasible, their hours of opening.

The Planning Authority may allow for some discretion in situations where the premises has been vacant for an extended period, where the proposed design is of high quality and where the proposal will increase the residential population of the commercial centre.

The increasing role of internet shopping in the retail sector in Ireland is evident, with an estimated €4.1bn of online spend in 2014. The County features an extensive broadband network, which is being upgraded regularly by the private suppliers. This will enable retailers in the County to increase their online presence.

3.2.2.10 Policy RET₁₀: Retail Warehousing and Retail Parks

It is Council policy to strictly control and limit additional new retail warehousing/retail park floorspace in the County for the duration of the Plan. Any limited new retail warehousing will be on lands zoned Objective 'LIW' – "To improve and provide for low density warehousing/light industrial warehousing units", 'MIC' – "To consolidate and complete the

development of the mixed use inner core to enhance and reinforce sustainable development", 'OE' – "To provide for office and enterprise development" and 'E' – "To provide for economic development and employment" where the site has good access to a suitable road network and has access to integrated public transport. Where considered appropriate, some very limited retail warehousing may be open for consideration in or near the edge of lands zoned Objective 'MTC' – "To protect, provide for and/or improve Major Town Centre facilities", but only where it can be demonstrated that the proposal will add to the centre's overall attractiveness for shopping. Any application for retail warehousing will require to demonstrate that the proposal will not impact adversely on the vitality and viability of established retail centres in accordance with the criteria set down in the 'Retail Planning Guidelines for Planning Authorities' (2012).

The Retail Strategy 2008–2016 comments on the very significant increase in retail warehousing park schemes in the Greater Dublin Area since 2001. In terms of spatial distribution the heaviest concentrations of retail warehousing are to be found at:

- Nutgrove
- Sandyford Business District/Stillorgan Industrial Area
- Carrickmines
- Sallynoggin

The Retail Strategy comments quite forcibly on the reduced demand for new retail warehouse floorspace over the coming years and the need for careful consideration in future planning for this sector of the market. The Development Plan will give heed to the cautionary sentiment outlined in the Retail Strategy and will consider carefully any new proposals for additional retail warehouse floorspace in terms of potential retail impact both in existing centres and established retail warehousing cores. In addition, proposals will require to demonstrate that they are accessible by public transport and that there is sufficient capacity in the local road network to accommodate the development.

The Retail Planning Guidelines advise a retail warehousing floorspace cap of 6000 sq.m. gross with locational exceptions in the NSS five gateway cities. In these areas the Guidelines indicate that Planning Authorities may wish to consider designating potential development sites for large-scale retail warehousing. In 2013, an analysis of potential sites for large scale retail warehousing was undertaken for the County. The outcome of the study found that there was no potential site available in the County that meet the requirements of both the Retail Planning Guidelines (2012) and the Spatial Planning and National Roads Guidelines (2012).

3.2.3 Additional Retail Floor Space

3.2.3.1 Policy RET11: Additional Retail Floor Space

It is Council policy, while having regard to the ‘Retail Strategy for the Greater Dublin Area 2008 – 2016’, to nevertheless adopt a cautionary position in relation to the provision of significant additional retail floorspace in the County for the duration of the Plan – in recognition of the dramatic slowdown in the economy resulting in lower than expected immigration levels and consequent lower growth in overall consumer expenditure.

The Retail Strategy projects a ‘Convenience Goods Need’ for the County up to 2016 of c.28,000 sq.m. Projected ‘Comparison Goods Need’ is in a range between circa 96,000 sq.m. (Low Projection) and c.130,000 sq.m. (High Projection). (The difference between Low Projection and High Projection is a function of the proportions of comparison floorspace to be provided, or not, in the form of retail warehousing). To build in ‘flexibility’ into the Strategy to facilitate retail schemes that may not come on stream until after the end date of 2016 the Strategy also proposes that the 2016 floorspace need totals be ‘adjusted’ upwards by a maximum of 25% for comparison goods and 20% for convenience goods.

The authors of the Retail Strategy readily acknowledge the difficulties in preparing projections over long time periods and that the need figures referred to above should be reassessed at regular intervals “...in light of both the scale of population growth in the County and whether it is above or below the Regional Planning Guidelines figures used in the Strategy and the levels of economic activity both nationally and locally which impact, in turn, on the retail spend by individuals in any catchment area”.

Based on the analysis previously set out in policy RET2, and to give credence and substance to the need for a cautionary approach, it is considered that, in the

current climate, the upward ‘adjustments’ of 20% and 25% set out in the Strategy are over-optimistic and untenable. Indeed, even the validity of the High Projection ‘Comparison Goods Need’ figure of c.130,000 sq.m. seems questionable in the context of lower than expected population growth figures and contracting consumer expenditure levels.

In attempting to calculate realistic levels of needs it has to be borne in mind that, while the Strategy figures were inclusive of retail commitments as of summer 2007, existing grants of permission not yet commenced have not been subtracted nor have new retail completions since 2007. Notable among these latter figures is the c.36,000 sq.m. Phase 2 at Dundrum. While there is a question mark in relation to the timing of the delivery of Dundrum Town Centre Phase 2 it would appear prudent to subtract the 36,000 sq.m. allocated to Dundrum from the overall calculation.

3.2.4 Retail Strategy and Sustainability

Both the Retail Planning Guidelines for the Greater Dublin Area and the 2008-2016 Retail Strategy stress the importance of establishing the optimum location for new higher order (Major Town Centre/District Centre) retail developments which are accessible to all sections of society particularly by public transport and in a location which encourages multi-purpose shopping, business and leisure trips on the same journey. For lower order centres (Neighbourhood Centres and Convenience shops) these should be readily accessible from the local catchment by sustainable forms of transport – walking and cycling.

Contextually, Dún Laoghaire-Rathdown is spatially very small. The urban core of the County stretches no more than 5-6 kilometres east-west while north-south, along the coast, the extremities of the County’s core metropolitan area is no more than 12 kilometres in extent (Booterstown and Shankill). The ‘crow flies’ distances separating the various Major Town Centres and District Centres are very small – Blackrock and Stillorgan, for example, are only 2 kilometres apart, similarly for Nutgrove and Dundrum. Few parts of the County are more than 10-15 minutes travel time to a District or Major Town Centre. In terms of the sustainability agenda Dún Laoghaire Town Centre is located proximate to the DART line and forms the terminus to the most successful QBC in Metropolitan Dublin. Dundrum lies astride Luas Line B, Blackrock is well serviced by the DART and the Rock Road bus corridor while Stillorgan and Cornelscourt are adjacent to the N11 QBC corridor.

In terms of accessibility to lower order facilities few locations within the built-up area are significantly removed from Neighbourhood Centres, local

convenience shops and/or petrol filling stations to satisfy day-to-day shopping requirements.

3.2.5 Assessment of Retail Development Proposals

3.2.5.1 Policy RET12: Assessment of Retail Proposals

It is Council policy to ensure that applications for new retail development shall accord with the retail policies of the Development Plan and are objectively assessed as set out in Government Guidance in the form of the 'Retail Planning Guidelines' (2012).

Applications for new retail development shall:

- Be in line with the role and function of the retail centre in the Plan and accord with the scale and type of retailing identified for that location.
- Accord with the fundamental objective to support the vitality and viability of the retail centre and must demonstrate compliance with the sequential approach.
- Provide a detailed retail impact assessment and a transport impact assessment to accompany the application where appropriate.
- Be of a high quality and incorporate layouts that encourage active and engaging frontages where appropriate.

There shall be a general presumption against large out-of-town retail centres, in particular those located adjacent or close to existing, new or planned National Roads/Motorways.

- Priority movement for pedestrians, cyclists and public transport should be ensured. The influence and impact of the private car on the environs of the District Centre to be moderated.
- The residential amenity of established residential areas on the fringes of the District Centre to be protected and, where possible, enhanced.
- Net retail sales area¹ in Stillorgan District Centre zoned lands to be capped at 25,000 sq.m.

(ii) Blackrock District Centre

- To promote the future redevelopment of Blackrock as a sustainable mixed-use District Centre having regard to the broad objectives of the proposed Blackrock Local Area Plan.
- To ensure that the potential redevelopment of the Frascati and Blackrock Shopping Centres shall provide for improved linkages and pedestrian/cycle permeability across the Frascati Road and into the surrounding areas.
- To examine improved car parking facilities (multi-storey and/or underground) at Frascati Shopping Centre.
- To actively promote good quality residential development into a broader mix of uses. Any residential proposal, whether stand alone or in a mixed use scheme, shall include a mix of unit types.
- To prepare detailed traffic management plans for Blackrock – to be incorporated as an integral component of the proposed Local Area Plan.
- To encourage the renewal and provide for public realm improvement of the area between Blackrock DART Station and Main Street opening vistas to the shoreline and to improve pedestrian connections to the seafront.
- To upgrade the public realm along Main Street and Rock Hill to provide a more attractive environment for retailing.
- Net retail sales area¹ in Blackrock District Centre zoned lands to be capped at 25,000 sq.m.

(iii) Nutgrove District Centre

- To promote the regeneration and redevelopment of Nutgrove District Centre as a sustainable, multi-faceted mixed-use District Centre.
- To encourage a broader range of uses into the District Centre including good quality residential, leisure and commercial office floorspace.
- Net retail sales area¹ in Nutgrove District Centre zoned lands to be capped at 25,000 sq.m.

(iv) Cornelscourt District Centre

- Net retail sales area¹ in the Cornelscourt District Centre zoned lands to be capped at 25,000 sq.m.

3.2.6 Specific Objectives

(i) Stillorgan District Centre

- To promote the future redevelopment of Stillorgan as a multi-faceted, mixed-use sustainable District Centre having regard to the broad objectives of the adopted Stillorgan Local Area Plan.
- The regeneration and redevelopment of Stillorgan District Centre should create an urban context in respect of scale, design and layout.
- Good quality residential development shall be encouraged to ensure vitality and animation both day and night.
- The creation of quality spaces and enhanced public realm will be a prerequisite.

¹ Net retail sales area – the net sales area of a shop or store which is devoted to the sales of retail goods exclusive of staff and storage areas