Comhairle Contae
Átha Cliath Theas
South Dublin County Council

Clonburris

A vibrant community offering a new way of living

Clonburris Strategic Development Zone (SDZ) Draft Planning Scheme

RETAIL STUDY

September 2017

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1 Introduction

1.1 Study Objectives

MacCabe Durney Barnes has been commissioned by South Dublin County Council to prepare a Retail Study for Clonburris Strategic Development Zone (SDZ). The brief was as follows:

1. Review the current retail policy including that in the Retail Strategy for the Greater Dublin Area (RSGDA) 2008-2016, the South Dublin County Development Plan (CDP) 2016-2022, the current Clonburris SDZ Planning Scheme and the Balgaddy Local Area Plan.
2. Undertake a health check assessment of centres within the catchment.
3. Assess retail floorspace requirements, and more specifically
    - assess the vitality and viability of existing centres within the catchment
    - measure existing floor space (including update of 2008 GDA Retail Strategy)
    - assess the retail need, taking into account of revised planned population for Clonburris and growth in consumer spending
    - assess the additional retail floorspace requirements, having regard to turnover of existing retailers, sales density, etc.
4. Consider issues of phasing, sequential development and the emerging SDZ Planning Scheme
5. Make recommendations accordingly.

1.2 Clonburris SDZ Planning Scheme Review

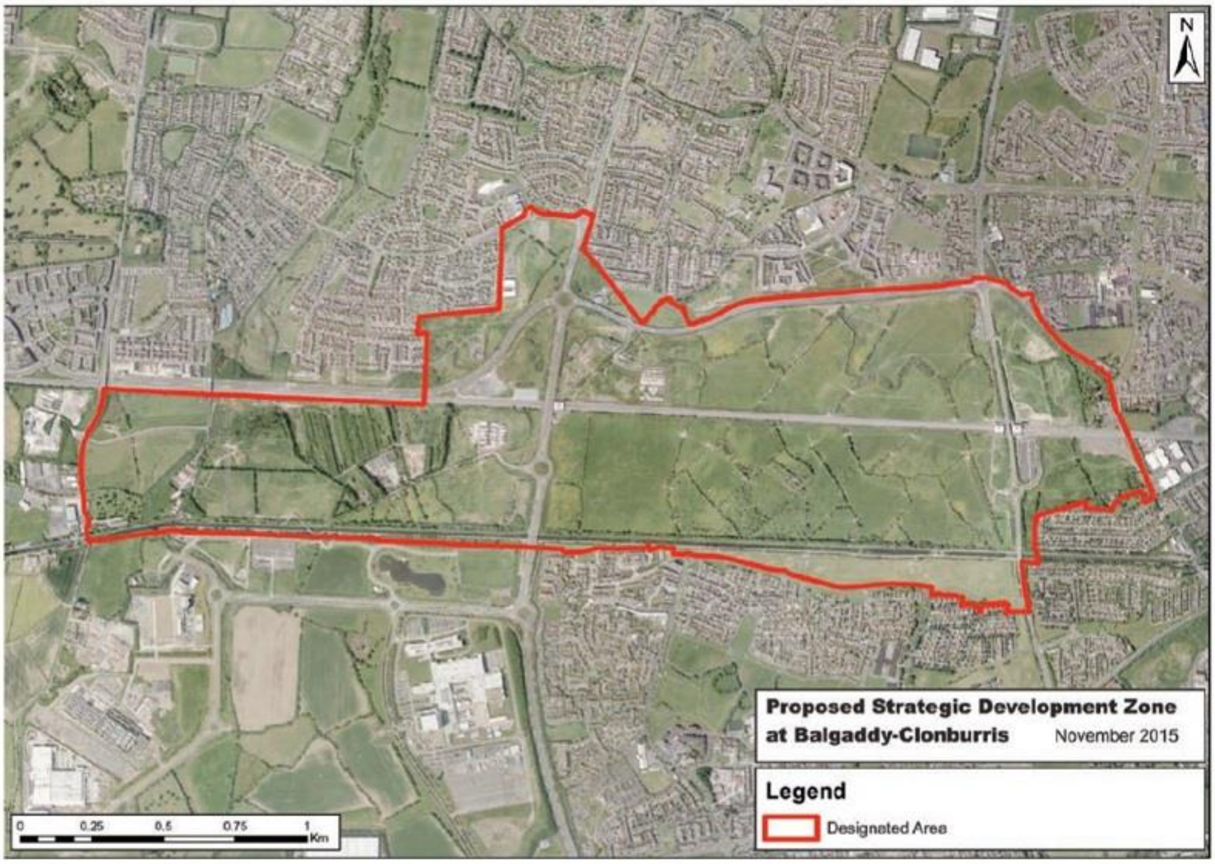
The Planning and Development Act 2000 (Designation of Strategic Development Zone: Balgaddy-Clonburris, South Dublin County Council) Order 2015 came into operation on the 25th December 2015. The order designated 280 ha of lands in accordance with Part IX of the Planning and Development Act 2000 as amended for "*residential development and the provision of schools and other facilities, commercial activities, including employment office, hotel, leisure and retail facilities, rail infrastructure, emergency services and the provision of community facilities*".

Prior to the 2015 Government Order, the lands were divided into three distinct areas:

- The Clonburris Strategic Development Zone, covering approximately 180ha of land, designated under the 2006 Government Order (SI 442 of 2006); and
- The area covering c.80ha, a designated Local Area Plan in accordance with Local Objective 26 of the South Dublin County Development Plan 2004-2010.
- Additional lands to the west of the R120 totalling 20ha

The 2015 Order effectively merged the two plans into one planning scheme to which the provision of Part IX of the Planning and Development Act as amended, would apply, including the preparation of a draft planning scheme within two years of the adoption of the Order. The site is located west of the M50 and south of the N4. Both the Kildare Railway Route and the Grand Canal cross the SDZ area. The lands are located north west of Clondalkin and south of Ronanstown. Adamstown is located to the east. Lucan Newlands Road, Ninth Lock Road, the R120 and Clonburris Great form the boundary.

Figure 1: Clonburris Planning Scheme Area



1.3 Structure of the Report

Section One is the introduction.

Section Two of this report reviews relevant policy which will inform the definition of the appropriate size and location of the retailing requirements in the Clonburris SDZ. It will cover the relevant national guidance and policy, as well as regional and local policy.

Section Three details the Health Check Assessment which considers the performance of centres identified within the catchment area.

Section Four provides an assessment of retailing capacity and an analysis of retailing need in relation to the Planning Scheme.

Section Five considers phasing and design issues.

Section Six provides a summary of the main recommendations in relation to the Reviewed Planning Scheme.

Section Seven provides a brief review of the Draft Planning Scheme.

Sections two to six were prepared in October 2016 as inputs into the preparation of the Planning Scheme and Section seven was prepared in August 2017 to provide a review of the Draft Planning Scheme.

2 Policy Context

2.1 Retail Planning Guidelines for the Planning Authorities 2012

The Retail Planning Guidelines have been revised and updated, placing a greater emphasis on competition and serving consumers.

Taking account of the above, five key policy objectives must guide planning authorities in addressing retail development issues in their development planning and development management functions, namely:

- 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 in accordance with the Smarter Travel strategy; and
- Delivering quality urban design outcomes.

Section 3.3.3 of the Guidelines emphasises, inter alia, that County Development Plans must outline the level and form of retailing that is appropriate to the various components in the settlement hierarchy of the core strategy, provide a broad assessment of retail floorspace and set out guidance on the location and scale of retail development to support the settlement hierarchy.

District Centres are defined as those which provide ***"….****a range of retail and non-retail service functions (e.g. banks, post office, local offices, restaurants, public houses, community and cultural facilities) for the community at a level consistent with the function of that centre in the core strategy. They can be purpose built as in new or expanding suburbs or traditional district centres in large cities or town"* They should not serve as a retail destination in their own right and should serve new or expanding suburbs. They can serve populations in excess of 10,000 persons. Their provision should be based on significant growth in population[1]. Local Centre or Neighbourhood Centre *"…comprise a small group of shops, typically comprising newsagent, small supermarket/general grocery store, sub-post office and other small shops of a local nature serving a small, localised catchment population."*

[1] A guideline size of approximately 10,000 sq m net and up to 20,000 sq m net is set for the metropolitan area of the GDA was given in the 2005 Guidelines.

2.2 Retail Design Manual 2012

The Retail Design Manual is the companion document to the Retail Planning Guidelines 2012. It sets out the principles by which good retail design may be achieved in a manner similar to the Urban Design Manual.

Higher density mixed use development generally enhances the vitality of urban centre, in particular in areas where higher gross density is central to the responsible use of the lands. This is particularly relevant in areas in proximity of public transport access points with high carrying capacity.

The Manual advocates the application of strong urban design principles in the retail development, particular in existing or newly planned towns and villages. It promotes long-life and loose fitting solutions to extend the life of retail units beyond their original use, in particular to help them evolve with technology and shopping trends.

When preparing the design brief, movement must be looked into in detail, along with desire lines to see how opportunities can be generated to help make connections between existing and proposed communities and key community facilities.

2.3 Regional Planning Guidelines for the Greater Dublin Area 2010-2022

The Regional Planning Guidelines for the Greater Dublin Area set out the settlement hierarchy for the Region. Clondalkin, which in the document is noted as including Clonburris, is classified as a Metropolitan Consolidation Town which is defined as a "*strong active urban place within the metropolitan area, located on a Multi Modal Corridor in metropolitan hinterland*" and as a Level 3 Town and/or District Centres in the Regional Retail Hierarchy.

2.4 Retail Strategy for the Greater Dublin Area 2008-2016

The Retail Strategy for the Greater Dublin Area (RSGDA) considers the strategic retail hierarchy for the Greater Dublin Area and provides guidance on formats and sizes of centres within the hierarchy. District centres serve a population of 10,000 to 40,000 inhabitants. This corresponds to the planned population at Clonburris. The relevance of district and neighourhood centres needs to be considered, due to its location in proximity of the major centre of Liffey Valley Shopping Centre. Clonburris should provide a lower scale and mixed provision of shops that would mainly satisfy day-to-day needs of the resident population.

Paragraph 6.18 of the RSGDA outlines the policy in relation to district centres. They usually comprise groups of shops often containing at least one supermarket or superstore and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as libraries. A supermarket (defined as less than 2,500 sq m net food sales area) usually attracts a catchment of approximately 3,000-5,000 people in Ireland, whereas a superstore (defined as more than 2,500 sq m net food sales area) has a larger catchment population of approximately 12,000-15,000 people. The level of floor space existing in each centre does vary considerably even if the centres are at the same level in the hierarchy. The

RSGDA suggest a guideline size of approximately 10,000 sqm net and up to 20,000 sqm net where appropriate in the metropolitan area of the GDA

While acknowledging that large centres have in the past been the focus of development and investment, paragraph 6.20 of the strategy underlines the importance of neighbourhood/ local centres. Paragraph 6.25 of the Strategy indicates that a neighbourhood/small town/village centre provides one supermarket or discount foodstore ranging in size from 1,000-2,500 sq.m with a limited range of supporting shops (one or two low range clothes shops with grocery, chemist etc.) and retail services (hairdressers, dry cleaners, DVD rental) cafes and possibly other services such as post offices or community facilities or health clinics grouped together to create a focus for the local population.

Table 1 below is extracted from the RSGDA and identifies the preferable retail formats expected depending on the level in the hierarchy. A supermarket of less than 2,500 sqm net food often with car parking, usually attracts a catchment of 3,000 to 5,000 people, while a superstore, which is larger than 2,500 sqm is noted as serving a population of 12,000 to 15,000 people. Furthermore, discount retailers should be located in highly accessible locations such as neighbourhood centres.

Table 1: Retail Format for Hierarchy Levels (RPGs for the Greater Dublin Area)

	Higher Order Comparison	Middle Order Comparison	Lower Order Comparison	Superstore	Supermarket
Metropolitan Centre	√	√	√	√	√
Major Town Centre	√	√	√	√	√
Sub-County Town Centre		√	√	√	√
District Centre		√	√	√	√
Neighbourhood Centre			√[33]		√

Source: RSGDA 2008-2016

2.5 South Dublin County Development Plan 2016-2022

Core Strategy

The Core Strategy recognises the role of Clondalkin (including Clonburris) as a Metropolitan Consolidation Town. It notes that the RPGs consider that the population of such towns could expand up to 100,000 people. Clondalkin is the second administrative centre in South Dublin. It also recognises that Clonburris represents a major extension of Clondalkin. The Planning Scheme is located over a number of Electoral Divisions (EDs) including: Clondalkin Cappaghmore, Clondalkin-Dunawley and Lucan -Esker, none of which are completely included in the planning scheme area.

General Urban Centres & Retail Policies

The overarching Urban Centres (UC) Policy 1 seeks to develop urban centres based upon a policy hierarchy of: promoting Tallaght as the county town; Clondalkin as a vibrant town; traditional village; a network of district centres; a network of local centres and shops. Urban Centre (UC) Policy 2 reinforces the role of Tallaght and Clondalkin as a focus for directing higher order retail and retail services and commercial activity. Urban Centres (UC) Policy 4 relating to District Centres seeks to encourage the provision of an appropriate mix, range and type of uses in District Centres, including retail, community, recreational, medical and childcare uses, at a scale that caters predominantly for a district level catchment, subject to the protection of the residential amenities of the surrounding area.

Retail (R) Policy 1 seeks to ensure adequate retail provision at suitable locations and to protect the vitality and viability of existing centres in accordance with the retail framework provided by the Retail Planning Guidelines for Planning Authorities and the RSGDA 2008-2016. It is however acknowledged that given the changing economic circumstances since the adoption of the RSGDA a cautionary approach will be adopted in relation to future quantitative retail floor space requirements. Retail (R) Policy 2 indicates that a sequential approach will be taken in the development of sites and centres in order to consolidate the vitality and viability of existing centres.

Retail Hierarchy

Chapter 5 of the County Development Plan 2016-2022 sets out the retail hierarchy for the County. Those centres within the hierarchy that are of particular relevance to the subject study are as follows:

- Level 2 (Major Centre) - Tallaght Town Centre, Liffey Valley Shopping Centre
- Level 3 (Town Centre) - Clondalkin
- Level 3 (District Centre) – Lucan Shopping Centre, Adamstown SDZ, Clonburris SDZ
- Level 4 (Local Centre) – Lucan Village, various
- Level 5 (Local Shops) - Various

Liffey Valley

The zoning Objective 'MRC' seeks *'To protect, improve and provide for the future development of a Major Retail Centre.'*

> *"It is the policy of the Council to support the Level 2 retail function of Liffey Valley Shopping Centre.*
>
> *R4 Objective 1: To support Liffey Valley as a Major Retail Centre and allow for the growth of the existing shopping centre and complementary leisure, retail warehouse and commercial land uses.*
>
> *R4 Objective 2: To support and facilitate consolidation of the quantum and quality of the retail offering at the Liffey Valley Major Retail Centre.*
>
> *R4 Objective 3: To support the development of retail warehousing within the Liffey Valley Major Retail Centre.*
>
> *R4 Objective 4: To prepare a Local Area Plan for the Liffey Valley Major Retail Centre with reference to the retail warehousing zone at the adjoining Fonthill Industrial Estate.*
>
> *R4 Objective 5: To promote a high standard of urban design in the Major Retail Centre that contributes to the creation of safe and attractive spaces and creates desirable places within which to work and visit."*

District Centre Policies and Clonburris SDZ

Clonburris is a designated Level 3 District Centre. The Development Plan considers that such centres would vary in size and scale of catchment, depending on the proximity of a major town centre. It also states that district centres would provide for a good range of comparison shopping, excluding the development of a large department store. One supermarket, at least, should be included, accompanied by financial and other retail services. District centres would generally cater for a population ranging from 10,000 to 40,000 people.

Retail (R) Policy 6 – District Centre

> *"It is the policy of the Council to maintain and enhance the retailing function of District Centres (Level 3 & Level 4).*
>
> *R6 Objective 1: To promote the development of District Centres as sustainable, multifaceted, retail led mixed use centres.*

R6 Objective 2: To ensure that the scale and type of retail offer in District Centres is sufficient to serve a district catchment, without adversely impacting on or drawing trade from higher order retail centres.

R6 Objective 3: To support and facilitate the development of new District Centres of an appropriate urban scale at Adamstown and Clonburris in accordance with approved Planning Schemes which should provide a sustainable retail mix including department stores and shopping centres that facilitates walking, cycling and use of public transport and reduces car journeys outside the SDZ for many retail needs."

While generally District Centres should exclude large department stores, Retail (R) Policy 6 objective 3 indicates that consideration should be given in respect of Clonburris to including the possibility of anchor department stores within the Planning Scheme, in addition to a mix of other uses.

Local 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 CDP adds that local centres may be located in Clondalkin, containing one supermarket ranging in size from 1,000 to 2,500 sqm. The Development Plan does not explicitly list any local centres in the Clonburris area.

Additional retail floorspace capacity in Clonburris should align with the planned population and must be sufficient to accommodate population growth and the expenditure needs of the area.

Land use zoning

The lands at Clonburris are zoned SDZ, which objective is "to provide for strategic development in accordance with approved planning schemes".

Other relevant zonings include:

- District Centre 'DC': 'To protect, improve and provide for the future development of District Centres'.
- Local Centre "LC": 'To protect, improve and provide for the future development of Local Centres'
- Zoning Objective 'MRC': 'To protect, improve and provide for the future development of a Major Retail Centre." This zoning applied to Liffey Valley.
- Village Centre "VC": "To protect, improve and provide for the future development of Village Centres".

2.6 Clonburris SDZ Planning Scheme and Local Area Plan 2008

Vision and Masterplan

The 2008 SDZ/LAP defines a town or district centre as a *"a combination of the following: cultural, civic, and governmental buildings; public spaces; historic buildings; and natural features."* The Planning Scheme refers to the main centre as a district centre (see Section H.8 of the plan)[2]. The SDZ/LAP includes a masterplan for the Clonburris Eco District. The district would be focused around Kishoge and Fonthill train stations, which would be accessed from two new major urban squares, surrounded by a mix of development to create a focus for public life in Clonburris. Their catchment and that of the area between them would form a major zone of accessibility, capable of supporting a wide range of urban densities and mixed uses within a 5-10 minute walking distance and would support excellent mixed uses at district and local centre levels.

Retail and mixed use were proposed to be located in the higher-density zones between Fonthill Station and Kishoge Station and would have an accessible street network. Flexible building types are promoted in each neighbourhood to enable local retail and local commercial enterprises to emerge.

Scenario and Phasing

The Planning Scheme outlines three scenarios for the development of Clonburris, as shown in Table 1 below, based on the delivery of transport infrastructure. These scenarios set out the sequencing for delivery of the components of the plan, including retail.

Table 1: Clonburris SDZ Planning Scheme 2008 Scenarios

	Scenario A	**Scenario B**	**Scenario C**
SDZ LAP	Kildare Route Project (4-tracking), including stations at Fonthill and Kishoge are complete and operational with associated bus services.	Contracts in place for the delivery of Metro-West <u>or</u> City-Centre Interconnect (Heuston to Spencer Dock & dart)	Contracts in place to deliver Metro-West <u>and</u> Interconnector project
	Baseline	Based on increased accessibility	Based on increased accessibility
Units	**10,600**	**13,800**	**15,005**

Scenarios B and C are heavily dependent on the delivery of public transport infrastructure. Table C10 of the plan outlines the provision of floorspace based on those scenarios.

[2] The South County Development Plan 2004-2010 included an objective to facilitate town centre type uses.

Phase 1 is focused around Fonthill Station and along Station Road. It will see the delivery of a minimum of 5,000 sqm net of retail floorspace and up to maximum 20,000 sqm net, some of which must be allocated to a food supermarket.

Phase 4 looks at further development in the district centre including key civic infrastructure. It will involve the delivery of an additional 10,000 sqm net of retail floorspace if Scenario A is unfolding or of an additional 20,000 sqm net of retail floorspace under Scenario B. Phase 4 does not specify the split between comparison and convenience.

Types and Quantum of Development

The plan area is broadly split into two parts: "*Clonburris outside and other green/public space*" and "*Clonburris in parks and other green/public open spaces*". The retail uses are permitted based on the area and are illustrated in Table 2.

Table 2: Clonburris SDZ Planning Scheme 2008 Permitted Retail Uses

Area	In principle	Open for consideration
Outside parks	Betting office, petrol station, retail services, shop, public house, restaurant/café	Cash & carry/wholesale outlet, garden centre, household fuel depot, motor sales outlet, retail warehouse
Inside parks	Restaurant/café	None

Table C10 of the Plan quantifies the maximum retail floorspace for each of the neighbourhood in the plan area under the three development scenarios.

Table C10. Maximum extent of retail

Neighbourhood	Max Retail Space * (sq.m net)		
	Scenario A	Scenario B	Scenario C
Cappagh	3,000	3,000	3,000
Clonburris Lock	7,000	10,000	10,000
Clonburris Cross	20,000	27,000	27,000
Gallanstown	1,000	1,000	1,000
Clonburris Little	1,000	1,000	1,000
Kishoge Bridge	11,000	11,000	11,000
SDZ total	**43,000**	**53,000**	**53,000**
Kishoge Cross	4,500	4,500	4,500
Kishoge Grange	500	500	500
LAP total	**5,000**	**5000**	**5,000**
Overall total	**48,000**	**58,000**	**58,000**

* Retail floorspace is defined as floorspace used for the purposes of shopping as defined in the Planning and Development Regulations 2001 (as amended)

Section C.4.9 notes that:

> *"As a minimum, retail development in the vicinity of Clonburris Main Street must include at least one large food supermarket and other retail units suitable for use as individual shops and retail service outlets including at least one public house. Development at Kishogue Centre must include a convenience food centre and other units suitable for use as individual shops and retail service outlets."*

Development Framework

The section on the neighbourhood frameworks clearly allocates roles and functions of each of the SDZ and LAP neighbourhoods. Clonburris Cross, located in the SDZ, would contain the main retail, commercial and civic uses for the new urban district based around Main Street and Fonthill Station. It will be focused around a main public square. The main retail areas are proposed around the stations at Kishoge and Fonthill. It was intended that all public places around Clonburris would be animated by a mix of uses to include retail, leisure and entertainment.

Table C10 above identified the quantum of retail floor space permissible in each of the neighbourhood. The Plan's section on Proposals for Development notes that up to 10% of the permissible and other commercial floor space may be transferred to an adjacent neighbourhoods.

2.7 Liffey Valley Town Centre Local Area Plan March 2008

The Liffey Valley Town Centre Local Area Plan was adopted in 2008. The Plan addresses the existing Liffey Valley Centre and the lands zoned TC "Town Centre" in the immediate vicinity of the centre.

There are ten broad objectives. Of particular relevance is Objective 2 which seeks:

> *"To facilitate the long term development of Liffey Valley as a Level 2 Retail Centre."*

The Plan was initially to cover the 2008 to 2014 and was extended for a period not exceeding 5 years in 2013 as it was considered that the objectives had not substantially been secured.

The Plan integrates residential and retail and is largely focused on integrating the 46,000 sqm shopping centre as part of a wider masterplan area. The plan includes the provision of affordable start up retail floorspace (875 sqm).

It proposes phasing of development whereby the provision of additional retail floorspace will be paired with that of other transport or community infrastructure. As part of the implementation, quantum of additional retail floorspace are provided as follows:

- Phase 1 - 0-6,500 sqm net retail space refers to 3,500m2 convenience and remainder is comparison goods floorspace

- Phase 2 - 6,500-20,000 sqm retail/commercial (net floor area)
- Phase 3 - 20,000-30,000 sqm + retail/commercial (net floor area)
- Phase 4 - 35,000 sqm + retail/commercial (net floor area)

While Phases 1 and 2 only consider civic and transportation infrastructure, Phase 3 integrates the provision of residential units.

2.8 Tallaght Town Centre Local Area Plan 2006

The Tallaght Town Centre Local Area Plan was adopted in 2006 and it was renewed in 2011. The Plan indicates that the retail floor space would increase from 100,022 sqm in 2006 to 186,204 sqm in 2018. The Plan also envisages phasing for achieving the objectives of the plan. Of relevance should be noted:

- Phase 1 where one of the outcomes required was the *“greater choice of shopping/entertainment”*.
- Phase 3 relating to Cookstown South is focused around the “*Redevelopment of small-scale industrial sites and possible refocusing/intensification of Belgard Retail Park*”. This phase was to be completed by 2011.
- Phase 4 - The Square Phase IV, redevelopment of the vacant Fruitfield site would also result in a greater choice of shopping/entertainment.

2.9 Adamstown Strategic Development Zone Planning Scheme 2014

Adamstown is a Strategic Development Zone located to the west of Clonburris. It is also traversed by the Dublin – Kildare railway line. The Planning Scheme was adopted in 2003 and amended in 2014.

Table 2.4 and 2.5 of the Planning Scheme outlines the maximum of floorspace per use in each of the neighbourhoods of Adamastown.

- Maximum of 8,905 residential units
- Minimum of 15,859 sqm of retail and retail services and maximum of 24,175 sqm

The retail floor area is not broken down into comparison and convenience floor space. Of the total maximum amount, 14,625 sqm would be provided at Adamstown Station, which is a designated District Centre and the remainder allocated to 10 other centres. It is assumed that the floor area is gross floor area.

Again, the principle of transferrable floorspace is applied in the Planning Scheme where floorspace may be transferred from a neighbourhood to another under specific conditions, expect at Adamstown Centre, Tandys Lane Village and Tobermaclugg Village.

3 Health Check Indicators

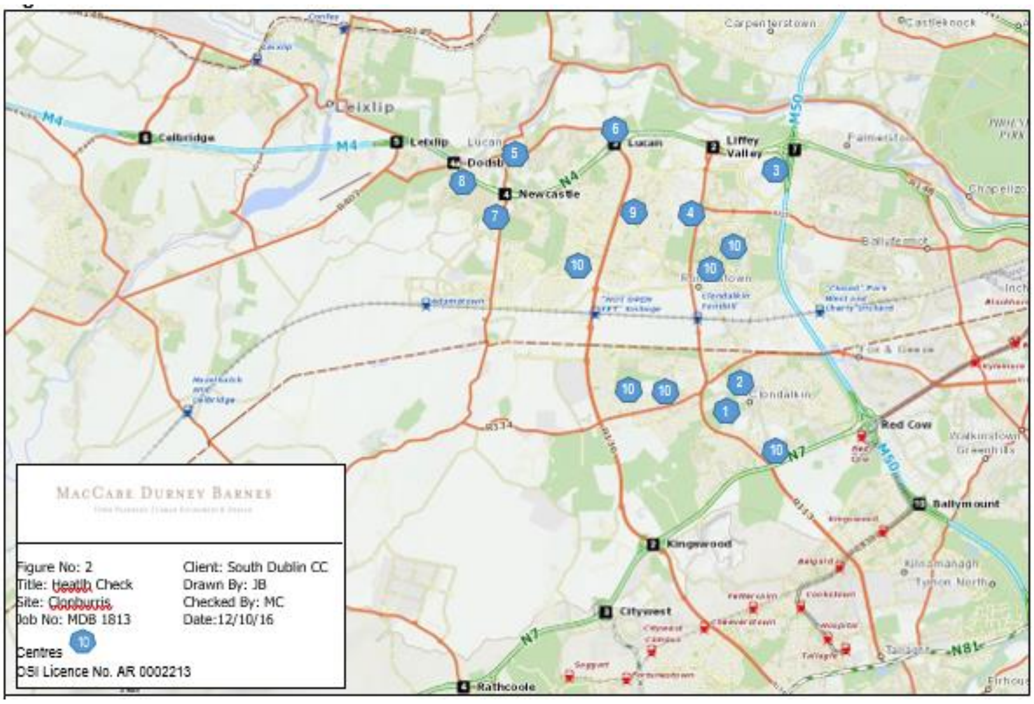
3.1 Introduction

The Retail Planning Guidelines outline a number of indicators that can be used to assist in determining the health of centres. Those include: diversity of uses, competitiveness, retailer representation, vacancy levels, accessibility, amenity and attractions. The health check provides the baseline information on the viability and vitality of a centre. The following centres were surveyed as part of the assessment:

1. Clondalkin Village
2. The Mill Centre, Clondalkin
3. Liffey Valley Shopping Centre (SC) & Retail Park
4. Fonthill Retail Park
5. Lucan Village
6. Lucan Retail Park
7. Lucan Shopping Centre
8. Hillcrest Lucan
9. Ballyowen SC
10. Other local centres

The surveys were carried out on the 19th and the 26th of September 2016 between 10am and 1pm. These centres are illustrated in Figure 2.

Figure 2 – Health Check Centres



3.2 Clondalkin Village

Clondalkin Village is designated as a Metropolitan Area Level 3 Town Centre in the CDP. Clondalkin Village is a bustling busy village with upwards of 60 units clustered around the main street and towards Tower Road. The retail development in Clondalkin has grown organically over the years characterised by independent retailers and service providers.

Diversity of Uses

As part of the health check, a survey of retail units was conducted in the village. This identified the following:

- A total of 61 units were counted in the village centre.
- 10% of those units were dedicated to convenience retail (including a Tesco supermarket on the outskirts of the village, newsagents, fishmongers, butcher, health food shop etc.)
- 26% were of the units were dedicated to comparison goods (pharmacy, clothes, household appliances)
- 38% of those were dedicated to service (hairdresser, phone & IT repair, real estate agent, dry cleaners, betting shop etc.)
- 20% of units were occupied by restaurants, pubs and cafes

There is a range of community, social and cultural service and amenities present resulting in a wide diversity of uses throughout the village itself.

Competitiveness

Tesco is the main anchor retailer in the village but a variety of local independent retailers operate in the village. There is competition within the centre, but in particular the Mill Centre provides convenience retailing competition. There is evidence of overtrading and full utilisation of commercial spaced.

Retailer Representation

Mostly the independent retailers dominate Clondalkin village, but also includes a number of multiples including Tesco.

Vacancy Levels

Three units were noted vacant at the time of the survey.

Accessibility

The centre is easily accessible by car and by pedestrian. There is a bus service along the Main Street. The street network serves the neighbourhoods around Main Street well, with clear pedestrian access.

Plate 1 – Clondalkin Village

Plate 2 – Tesco, Clondalkin Village

Amenity and Attractions

The village is evidently a busy retail and services centre for the local population. It is well maintained, with good quality street furniture and finishes and publicly maintained planters.

3.3 The Mill Centre, Clondalkin

The Mill Centre is a separate and distinct retail centre to Clondalkin Village

Diversity of Uses

There was a range of uses as follows:

- A total of 28 units were counted in the Mill shopping centre.
- 11% of those units were dedicated to convenience retail (including Dunnes supermarket, butcher, and a flower shop.)
- 43% were of the units were dedicated to comparison goods (pharmacy, newsagents, photo gifts, jewellers)
- 25% of units were dedicated to service (hairdresser, phone & IT repair, real estate agent, dry cleaners, betting shop etc.)
- 11% of units were occupied by restaurants, pubs and cafes

There is also a post office in the centre

Competitiveness

The Mill Centre is located on Ninth Lock Road and is a separate retail centre to Clondalkin village, Dunnes Stores is the anchor tenant with other large multiples including: MacDonalds, Lloyds Pharmacy, Costa Coffee and The Carphone Warehouse. The carpark has over 800 spaces.

Retailer Representation

There is a relatively good retailer representation.

Vacancy Levels

One unit was vacant at the time of the survey.

Accessibility

The centres is easily accessible by car, pedestrians and bus.

Amenity and Attractions

The Mill centre building looks dated, with damaged signage and its appearance is a little down at heel.

The Mill centre has an INTREO and MABs office on the same site as the carpark.

Plate 3 – Mill Centre, Clondalkin

Plate 4 – Mill Centre, Mall

3.4 Liffey Valley SC & Retail Park

Liffey Valley SC and Retail Park are located at the intersection of the M50 and the N4 , and the shopping centre forms part of the wider retail park which includes retail warehousing, car sales and some office buildings and a hotel with a 3,100 surface car park spaces. Liffey Valley is a busy and popular retail destination with the entertainment and restaurants providing added attraction to visitors.

Diversity of Uses

The centre has 100 units, the anchor tenants are Marks and Spencers with many other multiples such as Dunnes Stores, Next, Boots , H&M, Topshop, River Island and others.

Convenience goods are provided only by Marks and Spencers Food Hall and Thunders Bakery. The remainder of units are dedicated to comparison goods (Fashion, shoes etc) and retail services such as hairdressers.

The centre has a 14 screen cinema, The Vue Cineplex , and a food court with 25 restaurants and cafes including Milanos, TGI Fridays and Mac Donalds

The Retail Park includes comparison household retail and bulky goods including Argos, B&Q, Halfords and other well-known multiples

Competitiveness

In relation to comparison offer, the mix of stores gives a good choice to consumers. However, the convenience food offer is limited to only one food supermarket.

Retailer Representation

There are few independents in Liffey Valley with large multiples and well known brands predominantly occupying the retail space.

Accessibility

The centre is easily accessible by car and pedestrians. The Centre is served by 13 no. Dublin Bus routes, with a number of Bus Eireann Routes also serving the centre.

Amenity and Attractions

The extensive car parking and limited landscaping limits the external attractiveness of the centre. Internally, the mall is simple in design and reflect the period at which it was developed. The cinema is a significant attraction to the centre.

Plate 5 – Liffey Valley Shopping Centre

Plate 6 – Liffey Valley Interior

3.5 Fonthill Retail Park

Fonthill Retail Park is located close to the Liffey Valley, N4 and M50 and is adjacent to the Fonthill industrial estate where several multinational companies including Philips, Powercity and Homebase are present.

Diversity of Uses

- There was a total of 18 units noted in the Retail Park. Both Lidl and Aldi have supermarkets in the park and there is one Londis, with convenience retail accounting for 28% of the units.
- There were 9 units or 50% in comparison retail with comparison multiples such as Smyths Toystore, Powercity and Homestore dominating and few independents evident.
- Café/ restaurants occupied 2 units

Competitiveness

Both Lidl and Aldi, Polonez, Dealz and Eurasia are located in Fonthill, larger retailers dominate in the park.

Retailer Representation

There have been recent entrants into the Park including Polonez and Dealz, indicating good convenience retailer representation.

Vacancy Levels

There were 2 units vacant at the time of the survey.

Accessibility

The retail park is easily accessible by car and close to the N7 and M50 and is accessible by public transport. There is a bus route along the Fonthill Road linking Clondalkin with Liffey Valley. As it is a large retail park covering large area, it is not attractive to pedestrians and most users would need a car, much of the retail is in bulky household and toys, electrical goods etc.

Amenity and Attractions

The retail park has a large free car park, units are well presented and maintained.

Plate 6 – Southern part of Fonthill Retail Park

Plate 7 – Retailers in northern part of Park

3.6 Lucan Village

Lucan village is located adjacent to the N4 and the M50 with 80 units located on Main street and The Old Hill.

Diversity of Uses

- The main convenience store is Londis and this with other small convenience shops, including a Centra, which account for 10% of the total units.
- Small independents comparison retail accounted for 23% of the units including ladies fashion, charity shops and pharmacies.
- Half of the units in Lucan village are occupied by services such as hairdressers, IT repair, estate agents, Ulster Bank, Bank of Ireland and an EBS office.
- Restaurants, cafes, takeaways and Pubs accounted for 13% of units

Competitiveness

There is no anchor tenant in Lucan village with most units being independents.

Retailer Representation

There is no evidence that multiples are seeking to locate in the village. There are a number of charity shops

Vacancy Levels

There were four units noted vacant at the time of the survey, and two of these units were on the end of the Main Street.

Accessibility

The centre is easily accessible by car and pedestrians. The village is well served by buses.

Amenity and Attractions

The village is located on the river with the local school and old churches nearby. It is attractive and well maintained, with attractive hanging baskets and a traditional village ambience. Many of the units occupy the ground floor of old village houses in well maintained terraces.

Plate 8 – Lucan Village Main Street

Plate 9 – Parade of shops

3.7 Lucan Retail Park

Lucan Retail Park is located on the N4 at the Ballydowd interchange close to the M50.

Diversity of Uses

There are 4 units in the retail park with Woodies being the main anchor tenant, other units are bulky household or electrical items including DID Electrical, Halpenny Golf, and TC Mathews Carpets

Competitiveness

Woodies is the main trade draw to this small retail park with limited retail offer.

Vacancy Levels

There were no units vacant at the time of the survey.

Accessibility

It is easily accessible by car being located at the N4 junction and close to Lucan Village.

Plate 10 - Lucan Retail Park

3.8 Lucan Shopping Centre

Lucan Shopping Centre is located on Newcastle Road, south of the junction of N4 and Lucan by-pass and is 1.5 km from Lucan Village. This is a busy shopping centre with 800 car parking spaces for customers.

Diversity of Uses

- There was a total of 23 units noted in the Lucan SC with Supervalu and Dunnes stores (comparison) as anchor tenants.
- 43% of units were occupied by services such as hairdressers, and there was 5 units were occupied by cafes and restaurants including Starbucks and MacDonalds.

Competitiveness

Supervalu (food) and Dunnes stores (comparison) are the main anchors. There is no specific competition to these anchors within the centre.

Retailer Representation

Other multiples include O'Brien's Wines, MacDonalds and Starbucks. There are a number of independent retailers

Vacancy Levels

There were no units vacant at the time of the survey. The fact that there are no vacant units indicates that the centre is trading well.

Accessibility

The centre is accessible by private car from the N4 and serves most of Lucan and Adamstown.

Amenity and Attractions

The centre is well maintained. The mix of services and retailing makes it an attractive centre. It also accommodates a library and St. Patrick Church and Scoil Aine Naofa and St. Thomas's Primary School are close by to the east.

Plate 11- Lucan Shopping Centre

3.9 Hillcrest Lucan

Hillcrest Lucan is located on Dodsboro Road in the Hillcrest residential area of Lucan, close to the N4. It is c1km form Lucan Shopping Centre.

Diversity of Uses

There was a total of 8 units noted in the Retail Park. Tesco is the anchor tenant with 2 other convenience units including a fruit and vegetable shop.

3 comparison retail units including a pharmacy and there are 2 units occupied by services.

Competitiveness

Tesco is the main tenant with limited other retail on offer. It provides competition for other convenience retailers in West Lucan.

Retailer Representation

The centre is attractive, well established and a busy local shopping centre.

Vacancy Levels

There were no units vacant at the time of the survey.

Accessibility

The shopping centre is accessible on foot located in the Hillcrest residential area and near to the N4.

Amenity and Attractions

While relatively well maintained, there are no specific attractions associated with the centre.

3.10 Ballyowen Castle Shopping Centre

Ballyowen Castle Shopping Centre is a busy retail centre located on Castle Road, near to the junction with Ballyowen Road.

Diversity of Uses

- There was a total of 19 units noted by the survey. There were three units occupied by convenience retailers including a Lidl supermarket and a large Eurospar.
- A further 6 units were occupied by services such as takeaway shops and cafes, betting shop, and Penny Hill Grill a large pub on the corner with Ballyowen Road.
- There is a medical centre and dental centre, creche and a gym in the shopping centre and a large Post office, solicitors and hairdressers.

Competitiveness

Lidl and Eurospar are the main tenants providing competition in food retailing.

Retailer Representation

The shopping centre is busy with most services provided by independents.

Vacancy Levels

There were no units vacant at the time of the survey.

Accessibility

The easily accessible by car. There are bus services along Ballyowen Road with a bus stop immediately adjacent to the centre.

Plate 12 – Eurospar Ballyowen Castle **Plate 13 – Lidl, Ballyowen Castle**

Amenity and Attractions

A large carpark in front of the shopping units dominates and litter was evident. The centre appears somewhat dated. The large and well know pub restaurant 'The Penny Hill Grill' is a landmark located on the site of Ballyowen SC. There is also a bottle bank. The overall centre is not cohesively laid out and integrated.

3.11 Other Small Local Centres

These centres would generally be classified as Level 5 centres within the retail hierarchy consisting of local convience store and retail services, such as bookies, takeaways and hairdressers. The centres examined were:

- Griffeen Centre
- Rowlagh Village
- Neilstown/ Ronanstown SC
- Newlands Retail Centre
- Bawnogue Village
- Deansrath

Diversity of Uses

These local centres surveyed have 10-15 units and provide limited retail but often vital services accessible on foot to the local population.

Neilstown / Ronanstown SC has 12 units, one third of the units are convenience (Centra, independent butcher), one third occupied by services, with a local post office and a community centre present and a small number of comparison retail.

Griffeen centre has 15 units at ground floor level and offers one convenience retail store, Centra, 5 units to services such as medical centre, barbers, solicitors, creche, hairdresser and the remainder are comparison retail and two units for restaurant and takeaway.

Rowlagh village is a small village centre with Supervalu as an anchor tenant in a parade of 6 shops. The other units are services with community service occupying 2 adjacent units.

Newlands Centre is a parade of units, with one convenience store and a predominance of retail services.

Bawnogue Village is a local parade of shops with 11 units.

Deansrath Centre is a local centre with 8 units, including a foodstore, off licence and bookies, in addition to a pub. There are two vacant units. It is complemented by a health centre.

Competitiveness

Generally, the centres provide for very local retailing provision and do not compete with each other.

Retailer Representation

There is limited multiple retailer representation in these local centres.

Vacancy Levels

Vacancy levels were low in all the small local centres surveyed with no vacancies evident in Griffeen or Neilstown

Accessibility

Accessibility varies depending upon the location of the centre. However, in general, they are located centrally within the local area which they serve.

Amenity and Attraction

Most centre are complemented by proximity of other community and social services. The amenity of the centres varies. Griffeen was well maintained, while Neilstown was in need of regeneration.

3.12 Overall Conclusion

All of the centres within the catchment appeared to be trading well, with low vacancy levels recorded. A number of the larger centres, including Clondalkin Village and Lucan Shopping Centre showed some evidence of over-trading. There was a good representation throughout the catchment.

4 Quantitative Analysis and Capacity Assessment

4.1 Introduction

This Section provides an assessment of the likely capacity requirements in quantitative terms for the additional retailing floor space in Clonburris, having regard to the policy context and its designation as a Level 3 District Centre. Consideration is also given as to the appropriate stage at which such retailing should be delivered in order to support the Planning Scheme area as it develops, while also balancing the need to protect other centres within the catchment. It should be noted that a quantitative assessment of this nature can only act as a broad indicator of the quantum of floor space required at various stages of the development and is based upon certain assumptions in relation to catchment size, population and household growth, other planned centres, in addition to projections for expenditure per capita. Convenience, comparison and retail services needs are assessed.

An initial assessment was undertaken in October 2016 and this informed the provisions of the emerging Draft Planning Scheme.

4.2 Methodology

The approach taken is a step by step capacity assessment. These steps are as follows:

- Identification of catchment or study area.
- Estimate the population at the base year and forecast year.
- Estimation of expenditure available within the defined catchment or study area at the base and forecast years. This involves projecting inflows and outflows or expenditure derived principally from the RSGDA 2008-2016.
- Estimation of the turnover of existing centres and permitted development within the catchment area which are likely to be affected by new retail development at Clonburris. In this regard other existing and proposed designated local centres are taken into account.
- Estimation of the likely turnover of the new retail development within the Planning Scheme area.
- Estimation of the capacity for additional floor space within the catchment.

All figures within the assessment have been rounded off to the nearest point of decimal. The price year throughout the assessment is 2013. Relevant 2016 census population information is used to inform the baseline. A forecast year of 2035 has been selected to allow for an appraisal of the retailing requirements. There is general data cut-off date of the 18th October 2016.

The assumptions adopted in this assessment are conservative and are based upon the most recent data in relation to expenditure per capita, population projections and turnover ratios. They fully reflect the recent economic downturn and current recovery in order to provide an account for realistic projections for the future. In addition, the methodology has due regard to Retail Policy 1 of the CDP, which states that a *"……cautionary approach will be adopted in relation to future quantitative floor space requirements."*

4.3 Baseline Information

4.3.1 Identification of Catchment Area

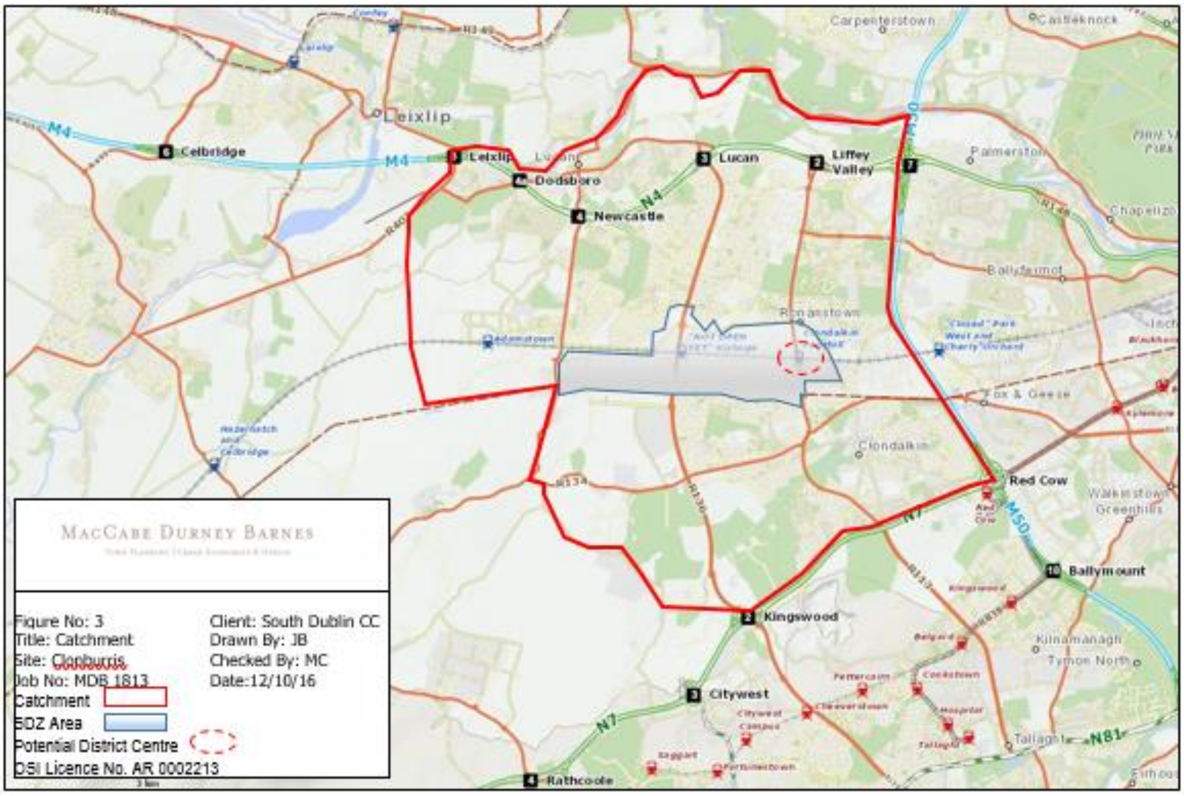
This has involved the identification of appropriate drive time isochrone having regard to the proximity of centres within the catchment and those outside. It has also had regard to the physical barriers associated with the area (e.g. the Liffey, M50 and N7). It is taken that the potential district centre is located at the Fonthill Road end of the Planning Scheme area. Given the nature of the retail element of the development, a 10 minute drive-time isochrone was selected and is indicated as the catchment in Figure 3 below. This is considered to be a reasonable basis for calculating the catchment given accessibility and location of other centres. It should be noted that this area is smaller than the Zone 9 catchment identified in RSGDA, as it excludes Leixlip, Celbridge and Newcastle. Zone 9 was the catchment associated with Liffey Valley, which is a Level 2 major town centre with a significant comparison offer and a larger catchment and drivetime.

The catchment contains the Level 2 major retail centre of Liffey Valley; Level 3 district/town centres of Clondalkin, Lucan Shopping Centre (Supervalu) and the proposed Adamstown Centre; and the Level 4 centre of Lucan Village. There are a number of very small centres, or parade of shops, which are zoned LC *"To protect, improve and provide for the future development of Local Centres"*. Some of these would be classed as Level 4 centres and others are deemed to be of such relatively small size, that they fall within the Level 5 (corner shops) of the retail hierarchy as defined the CDP.

Inevitably, there is overlap between adjoining catchments. In particular, Liffey Valley has a strong dominance for comparison shopping within the catchment but also draws significant trade from adjoining catchment given its retail offer and its high accessibility by the motorway network. Clondalkin Town Centre is also a significant centre in the catchment.

There is a current distribution of convenience retail providers throughout the catchment study area, with a Tesco in Clondalkin Village and Hillcrest, Lucan; a Dunnes at the Mill Centre; a Supervalu at Lucan Shopping Centre; Lidl stores at Clondaklin Village, Fonthill and Ballyowen; and Aldi stores at Fonthill and Newlands Cross. Main weekly shopping is undertaken in these centres. There is also a distribution of top up convenience retailing throughout the area.

Figure 3: Catchment of Study Area



4.3.2 Estimate of Population

An estimate of current and projected population within the study area is required. The 2016 current baseline population is taken from the 2016 Census. A policy induced growth rate is applied to the study area and based on the assumptions contained in the CDP core strategy and in particular the RPG targets which only go to 2022. The forecast year is 2035. The assessment assumes that:

- Zoned lands in Lucan (including Adamstown) is built out by 2022 with the increase in population as per Table 1.10 of the CDP.
- The Core Strategy of the CDP forecasts 8,000 residential units in Clonburris by 2025. The Planning Scheme provides a target of 8,437 units. .
- An average household size of 2.5 and a vacancy rate of 6.5% is applied in line with assumptions detailed in section 4.3 of the CDP Housing Strategy.
- The population of Clondalkin (including Clonburris) increases by 14,994 between 2016 and 2022 as per Table 1.10 of the CDP.

Table 3: Existing and Project Population

	2011 Census	2016 Census	2021 CSO M2F2	2026 CSO M2F2	2031 CSO M2F2	2035	% change 2016-2035
South Dublin County Council	265,205	278,749	291,521	302,158	318,846	330,480	19%
Study Area Total	90,166	95,008	107,720	112,650	117,581	122,511	29%

Source: RPGs and CSO Census

It should be noted that this will result in a very significant increase in population in the study area of 29% reflecting the build out of the two main development areas in the County and which represent the significant land banks in the GDA. Underlying these assumptions are that there is a properly functioning property market with adequate development capacity, are no infrastructural constraints and that state agencies actively promote the development of these areas.

4.3.3 Estimate of Expenditure within Catchment and Retained Market Share

The estimated expenditure levels for convenience and comparison retailing need to be established. All monetary values in the analysis have a **Price Year** of **2013**. This is the latest year for which disaggregated information is currently available from the Central Statistics Office's (CSO) Annual Service Inquiry (ASI) and its County Incomes and Regional Gross Domestic Product (CIRGDP) and Consumer Price Index (CPI) published data.

i) The per capita expenditure estimates for comparison and convenience goods are derived from the CSO's ASI, CIRGDP and CPI statistics for 2013, the latest year for which comparable disaggregated information is available and

ii) The Economic and Social Research Institute's (ESRI) Medium Term Review: 2013 – 2020, which provides forecast growth trends to 2020. Assumptions have been made in relation to forecasts between 2020 and 2035. We have applied a mid-growth scenario which lies between the full Recovery and the Delayed Adjustment scenarios.

Table 4: Existing and Projected Expenditure per Capita (2013 Prices)

Year	Convenience expend per capita	Comparison expenditure per capita
2016	€3,561	€3,264
2035	€5,990	€5,723

Source: MacCabe Durney Barnes

By multiplying the projected per capita expenditure on convenience goods for the projected population for the catchment area in the current and projected future year, figures for resident expenditure can be established for the catchment. These have to be adjusted to reflect additional inflow and outflow expenditure to reflect market share and retained expenditure. Broadly speaking the inflows and outflows of convenience expenditure into the catchment are in equilibrium reflecting the assumptions in Appendix 7c of the RSGDA.

However, there are significant inflows into the catchment for comparison expenditure associated with Liffey Valley which acts as a regional centre with high accessibility from the motorway network. The assumptions trade draw inflows are derived from Appendix 7b of the RSGDA.

Table 5: Available Convenience and Comparison Expenditure (2013 Prices)

Year	Convenience				Comparison			
	Resident	Inflows	Outflows	Total	Resident	Inflows	Outflows	Total
2016	€313.6m	€31.3m	€28.2m	€316.7m	€265.4m	€355.6m	€79.6m	€541.4m
2035	€625.4m	€62.5m	€56.2m	€631.7m	€551.8m	€739.4m	€165.5m	€1,125.7m

Source: MacCabe Durney Barnes

4.3.4 Estimate of Turnover of Existing Centres

This step involves an estimation of existing and committed retail floorspace within the study area. In establishing the baseline survey information, reference is made to the survey of existing and pipeline floor areas undertaken for the GDA Retail Strategy in 2008 (Appendix 6c). This survey provides information on existing floor areas in 2007. Development completed between 2008 and 2016 has been incorporated into the revised baseline. In addition, this has been supplemented by an examination of the planning register to determine permitted/committed pipeline development.

Table 6: Existing and Committed Floor Areas (sqm net sales area) in the Study Area

Centre	Convenience				Comparison (including bulky goods)			
	2007 Floor Area	Compl 2007-2016	Commit	Total Existing& Committed	2007 Floor Area	Compl. 2007-2016	Commit	Total Existing &Commit
Adamstown	0	0	3400	3,400	0	0	9,291	9,291
Mill Centre Clondalkin	2,512	0	0	2,512	4,306	0	0	4,306
Clondalkin Village	2,711	0	0	2,711	3,755	0	0	3,755
Liffey Valley Rt Pk	0	0	0	0	18,278	0	0	18,278
Liffey Valley SC	1,564	0	4,392**	5,956	27,493	0	27,318**	54,811
Lucan*	7,622	0	0	7,622	4,457	0	0	4,457
Lucan Rt Pk	0	0	0	0	4,821	0	0	4,821
Neilstown	249	0	0	249	92	0	0	92
Ronanstown/Fonthill	877	893	0	1,770	10,771	8,853	0	19,624
Rowlagh Village	498	0	0	498	422	0	0	422
TOTAL	**16,033**	**893**	**7,792**	**24,718**	**74,395**	**8,853**	**36,609**	**119,857**

Source: RSGDA 2008-2016, Planning Register
** Includes Lucan Village, Lucan Shopping Centre, Hillcrest Lucan and Ballyowen Castle Shopping Centre*
*** Includes 20,942 sqm of comparison and 892 sqm of convenience permitted by the Council under P.A Reg. Ref::SD16A/0027)*

The principal permitted pipeline development relates to development at Liffey Valley in the form of permitted Tesco store (P.A Reg. Ref:SD12A/0014), the permitted west end extension (P.A Reg. Ref: SD12A/0226) and the most recent significant expansion permitted by the

Council (P.A Reg. Ref:SD16A/0027[3]). The floor area does not include retail services, which in certain centres examined constituted a significant proportion of the overall floor area. In addition, it is assumed that all the retail space proposed for Adamstown is committed pipeline in 2016.

Assumptions in relation to average sales density per sqm are required for the convenience retailing. Appendix 1 of the RSGDA assumes a convenience sales density of €12,551 per sqm in 2016. Applying the growth rate in turnover per sqm resulting from improved efficiencies results in a sales density of €13,868 per sqm in the forecast year of 2035. The RSGDA assumes a combined bulky and non-bulky comparison sales density of €7,000 per sqm in 2016. Applying the assumed RSGDA growth factors would result in a comparison sales density of €7,734 per sqm in the forecast year of 2035.

The turnover of existing and committed convenience floor space is €310.2m in 2016 and €342.7m in 2035. Furthermore, the turnover of existing and committed comparison floor space in the catchment is €83m in 2016, rising to €927m in 2035.

4.4 Analysis of Retail Need and Requirements

4.4.1 Convenience Retailing

As highlighted above, it is estimated that there would be an available convenience retail expenditure in 2016 of €316.7m and a projected turnover in the catchment area of €310.2m for the existing and committed development, leaving a headroom of €6.5m. It should be emphasised that the committed but unbuilt floor area includes net convenience floor areas of 3,400 sqm in Adamstown and 4,392 sqm in Liffey Valley. In effect, this floor area would not come on stream until c2020. Notwithstanding this, the assessment indicates that even with this floor area in place there is still capacity for a further 520sqm of net sales area in a scenario where existing market share applies. This suggests current overtrading in other existing centres within the catchment. This is reflected in the health check carried out in Section 3 above.

The available expenditure rises significantly to €631.7m in 2035, reflecting the very significant increase in population in the area in the two development zones of Adamstown and Clonburris. However, turnover from the existing and committed floorspace is €342.7m in 2035. The available headroom would therefore increase to a significant €289m, or a floorspace equivalent of 20,840 sqm of net sales area. Consequently, there will need to be significant provision of convenience retailing in the catchment under the 2035 forecast scenario.

Given the level of expenditure available in the catchment the development of this floor space could be progressed without any significant impact upon the viability of other centres (e.g.

[3] As of October 2016, this application is the subject of third party appeals to An Bord Pleanala.

Clondalkin, Adamstown, Liffey Valley and Lucan Shopping Centre) within the retail hierarchy in the forecast year. Given relatively large convenience floor space requirement indicated above, the ultimate quantum of convenience floor space for Clonburris should not be calculated with reference to this capacity assessment, but rather with reference to the definition of a district centre and local neighbourhood centres contained in the RSGDA. The capacity assessment merely confirms that there will be more than adequate expenditure available to accommodate convenience floor space that is normally associated with a district centre or neighbourhood centre. The RSGDA indicate that a district centre can accommodate a superstore >2,500 sqm net sales area. A superstore is defined in Retail Planning Guidelines as "generally single level, self service stores selling mainly food, or food and some non-food goods, with at least 2,500sqm net retail floorspace but not greater than 5,000sqm net retail floorspace and with integrated or shared parking." The Retail Planning Guidelines indicate cap of 3,500sqm on convenience retail floor area in the Dublin area. Given the capacity assessment, Clonburris should be able to accommodate a store of this size. Issues of design and phasing are considered in further detail below.

There is also need to provide other convenience retailing throughout the Clonburris SDZ area in the form of neighbourhood or local centres anchored by small supermarkets or convenience stores, with a number of smaller retail and service units, which could be complemented by community facilities (e.g. crèche, medical centre). The anchor store should not be greater than 1,000sqm of net sales area. The distribution of level 4 local neighbourhood centres and other smaller Level 5 groups of shops is principally a matter for the urban design principles contained in the emerging planning scheme. Usually, such lower level centres will have a higher proportion of retail services (post office, cafes, video libraries, takeaways).

4.4.2 Comparison Retailing

In relation to comparison retailing, Liffey Valley dominates and will continue to dominate the catchment, particularly in relation to middle order and higher order comparison offer. There would be an available comparison retail expenditure in 2016 of €541.4m and a turnover in the catchment area of €582.7m for the existing development only, resulting in a slight negative headroom of €41.3m. This suggests an under-trading of comparison retailing in the catchment. It should be noted that there is a further 36,609 sqm of committed, but as yet unconstructed floor space at Liffey Valley[4] and Adamstown. However, effectively this floor space would only be operational by 2021 at the earliest. Currently, there is no current requirement for further comparison retailing floor space to serve the needs of the catchment.

The available expenditure rises significantly to €1,125.7m in 2035, reflecting the very significant increase in population in the area in the two development zones of Adamstown and Clonburris. The turnover of the existing and committed floorspace is €927m in 2035. This leaves a headroom of €198.7m, or a floorspace equivalent of 25,691 sqm of net sales area.

[4] The RIS for the Liffey Valley Plaza (P.A Reg. Ref:16A/0027) assumed a wider trade draw than that specified in the RSGDA 2008-2016

This indicates that there is a limited capacity for further comparison within the catchment upon the build out of the SDZ areas, but it is only of a scale that is commensurate with a district centre. The limited comparison floor space provision commensurate with a district centre, should provide for limited lower to middle order comparison retailing.

The distinction between floor space for non-bulky comparison goods provided for in shopping centres and bulky goods accommodated in retail warehousing should be a matter that is determined principally by the development form of the planning scheme and its inclusion of a designated district centre. The retail capacity assessment and the dominance of Liffey Valley indicates that the comparison floor space element of Clonburris will not serve the area beyond the catchment and will be principally in the form of a close association with the convenience anchor. R6 Objective 3 of the CDP seeks the provision of an anchor department store as part of the retail offer. This may prove challenging given the comparison offer at Liffey Valley and the envisaged role in the County Development Plan for Clondalkin Town Centre.

4.5 Retail Services

Comparison and convenience retail uses will be complemented byretail service uses such as hairdressers, bookmakers, coffee shops, etc. The RSGDA indicates that a floorspace figure of 20% is added to comparison and convenience retailing for purposes of determining retail services floorspace requirements for the Dublin Region. This figure has been adopted for the main district centre in the Planning Scheme. However, a higher figure of between 30% and 40% has been added to the neighbourhood and local centres reflecting the higher percentage of retail services which these centres usually accommodate.

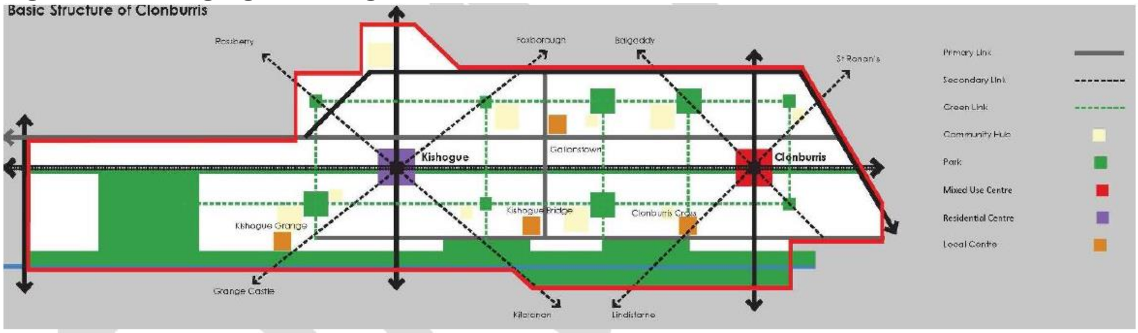
5 Phasing and Emerging Planning Scheme

5.1 Emerging Planning Scheme

The Clonburris Emerging Preferred Scenario Outline Description (SDCC, August 2016), indicates the following in relation to retail provision in the SDZ. The principal retail related elements of the emerging scheme are:

- Main centre at Fonthill Road railway station with 30% of uses allocated for retail/commercial
- A further centre at Kishoge with 15% of uses allocated for retail/commercial purposes
- Both centres to cumulatively equate to a small to medium sized district centre (10,000-15,000sqm net)
- A further four local centres are indicated at Kishoge Bridge, Kishoge Grange, Gallanstown and Clonburris Cross.

Figure 4: Emerging Planning Scheme



Source: SDCC

It is assumed that retail warehousing does not conform with the emerging planning scheme and therefore no further consideration is given to this format in this assessment. A number of considerations arise in relation to the emerging Planning Scheme and are these are considered below.

Fonthill Centre

A standalone superstore format would not be appropriate to the emerging Planning Scheme. While the retail offer of combining a maximum of 3,500qm of convenience and 1,500sqm of comparison in a single storey would be appropriate, the overall provision should in integrated with other comparison provision within the centre. A total comparison floor area of c4,500 sqm net sales area could be accommodated. In addition, retail services (e.g. cafes, shoe repairs, banks, post office, etc) and other non-retail services (e.g local offices, solicitors, restaurants, public houses, community and cultural facilities) should be provided. It was noted in the health check that there was a particular demand for retail services and non-retail services floor space in Clondalkin. A district centre of c16,000 sqm gross could be accommodated, which excludes non-retail service provision. The provision of this centre would comply with the Level 3 designation.

The size of the floor space in any single convenience store should be capped at 3,500 sqm net sales area in accordance with the Retail Planning Guidelines.

Kishoge

The other main retail centre indicated in the emerging Planning Scheme is at Kishoge. The emerging Planning Scheme indicates that Kishoge will provide for local convenience offer and services for residents. Effectively, the centre would operate as a Level 4 neighbourhood centre and should be designated as such. The RSGDA indicates that such centres should be anchored by a small supermarket. It is considered that it could accommodate a supermarket of c1,000 sqm net sales area and could be supported by a very limited amount of comparison floor space and in particular retail services (e.g. take-aways, shoe repairs, cafes, etc) and non-retail commercial floor space. It is not considered necessary to combine this centre with that at Fonthill in terms of the designation as a district centre. Kishoge should be considered a Level 4 centre in its own right

Other Local Centres

There are four other local centres identified in the emerging Planning Scheme. These would fulfil the role of Level 5 centres. They are corner shops for local top up shopping and the provision of other local retail services. No comparison floor space is required in these centres.

5.2 Sequential Development and Phasing

The Development Plan promotes the sequential approach in the development of centres, with the emphasis on preserving the viability and vitality of existing centres. Within the catchment particular emphasis is placed on preservation and promotion of Clondalkin village as a Level 3 Town Centre. In terms of the sequential approach and to ensure the retail provision within Clonburris caters for future and expanding population, it is assumed that:

i) the convenience and comparison offer of Clondalkin Town Centre is promoted;

ii) convenience offer at Adamstown and Liffey Valley will proceed in the near future; and

iii) there will be a significant expansion of comparison component of Liffey Valley

Having regard to the above, the analysis indicates that there is scope for the accommodation of a limited amount of convenience retailing at the early stages of the development of Clonburris without adversely affecting the viability of other centres. This would amount to local convenience stores of up to 500sqm net sales area for the first 1,000 units and a small supermarket of c1,000 sqm for the Level 4 centre by 2,000 units. The Retail Planning Guidelines and the capacity assessment indicates that further significant convenience retail provision will rely upon the expenditure generated by the resident population in Clonburris. Assuming a maximum floor area of 3,500sqm net, as permitted under the Retail Planning Guidelines in accommodated in Clonburris District Centre, this could be accommodated after c6000 units have been completed and occupied.

Comparison retailing should be located within the District Centre and should be provided at the same time as the convenience floor space provision, which will act as the anchor for the centre.

6 Recommendations for Emerging Planning Scheme

The following recommendations are made:

1. The designated Level 3 District Centre at Clonburris should be located on the Fonthill Road. It should accommodate a large supermarket, with supporting comparison goods floor area, retail and non-retail services. The Kishoge Centre should be a Level 4 centre with a small anchor supermarket and a range of other supporting services. The remaining 4 centres should be defined as Level 5 local centres and shops
2. Each of the centres can accommodate the floor space as detailed in Table7. This does not include non-retail commercial floor space, community facilities of civic floor space. Floorspace can generally be expressed as total gross floor area.

Table 7: Floor Areas

Centre Type	Convenience		Comparison		Retail Services	Total
	net sqm	gross sqm	net sqm	gross sqm	gross sqm	gross sqm
Fonthill District Centre	3,500	5,303	4,500	6,818	4,000	16,121
Kishoge Neighourh'd	1,000	1,515	200	303	1,000	2,815
Four Local Centres	1,000	1,515			1,000	2,515
Total	**5,500**	**8,333**	**4,700**	**7,121**	**6,000**	**21,455**

Source: MacCabe Durney Barnes

3. A cap of 3,500sqm net sales area should be placed on any convenience store at Fonthill Road. A small supermarket of c1,000 sqm net sales area at Kishoge can be accommodated. Generally, local centres should accommodate a convenience store of c300sqm net sales area.
4. The provision of stand-alone stores which are not integrated into the urban design framework for the designated centres should be avoided.
5. Retail provision could be provided in line with threshold of unit as follows in Table 8.

Table 8: Phasing

Indicative Phase	Unit Nos.	Description	Total Retail & Retail Services (sqm gross)
Phase 1a	0-1,000	2 no. Level 5 local centres	1,258
Phase 1b	1,001-2,000	Kishoge Level 4 neighbourhood centre	2,818
Phase 2	2,001-4,000	1 no. Level 5 local centre	629
Phase 3	4,001-6,000	Fonthill Road Level 3 district centre	16,121
Phase 4	6,001-8,000+	1 no. Level 5 local centre	629
			21,455

Source: MacCabe Durney Barnes

7 Review of Draft Planning Scheme

7.1 Introduction

This section reviews the Draft Planning Scheme and allows consideration of its provisions in the light of the recommendations in Section 6 which informed its preparation. The original quantitative and qualitative assessment was undertaken based on a data cut-off date of 18th October 2016. It is acknowledged that there are some changes to the baseline and the impact of these are also considered in this section. Sensitivity tests are undertaken based on different growth scenarios in the Draft Planning Scheme.

7.2 Changes to Baseline

There have been a number of changes to the baseline between October 2016 and August 2017.

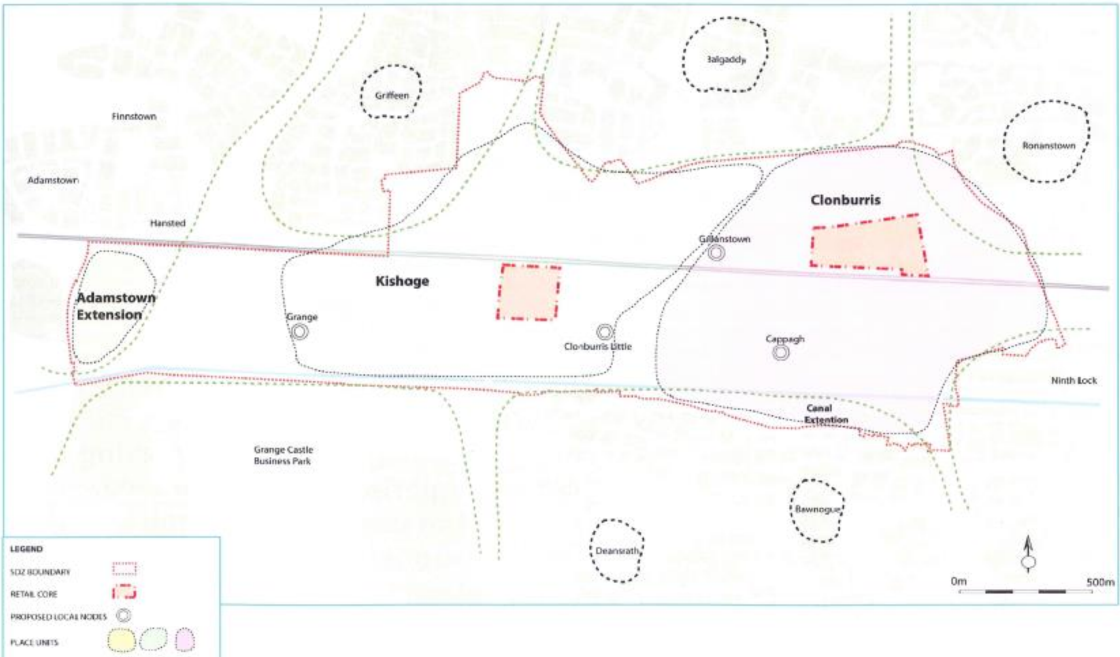
The CSO's Annual Services Inquiry (ASI) is available for 2014, which would allow for a 2014 price year as opposed to a 2013 price year utilised in the original assessment. There was a 7.1% increase in gross value added in 2013-2014 which would have a positive impact upon available expenditure in the area and consequently retail floor space requirements. However, given that the recommended floor space requirements for Clonburris, as detailed in Section 6 were below the quantitative assessment of retail floor space requirements outlined in Section 4.4, this change has no impact upon the volumes recommended and contained in the Draft Planning Scheme.

The other principal change to the baseline assumptions was that An Bord Pleanala refused planning permission in February 2017 for a major expansion of the Liffey Valley (P.A Reg.Ref: SD16A/0027, ABP Ref: PL 06S.247283). This means that existing and committed floor area in the catchment should be reduced by 20,942 sqm of comparison and 892 sqm of convenience. However, the refusal related to traffic impact and not retail impact and the Board recognised that there was a strong policy framework for the further expansion of Liffey Valley. As such it is not considered that it materially impacts upon the recommendations in Section 6, or the contents of the Draft Planning Scheme.

7.3 Draft Retail Planning Scheme Provisions

The main retail related provisions are contained in Section 2.5 of the Draft Planning Scheme. The provision of a district centre at Fonthill Road, a neighbourhood centre at Kishoge and four other local centres is generally in line with that recommended in Section 6 of this report.

Figure 5: Retail Centres in the Planning Scheme



Source: SDCC

The floor space is allocated on the basis of maximum retail provision in each development area. This is detailed below in Table 9. The overall quantum of retail related floorspace at 21,520 sqm is marginally greater than the 21,455 sqm recommended. However, this is not material in retail planning terms and has been done to fit in with the urban design and place-making requirements of the Planning Scheme. It is also noted that the distribution of floor space between the centres is slightly different from Table 7 in Section 6 of this report, but again this is not material in retail planning terms.

Table 9: Maximum Retail Provision in Each Development Area

Development Area	Gross Retail Area
Clonburris Urban Centre	16,520
Clonburris South West	400
Clonburris North West	400
Clonburris South East	0
Clonburris North East	0
Kishoge Urban Centre	3,500
Kishoge South West	300
Kishoge South East	400
Kishoge North West	0
Kishoge North East	0
Adamstown Extension	0
Canal Extension	0
Total	**21,520**

Source: SDCC

The phasing table in Section 4.3 of the Planning Scheme relates to the phasing tranches suggested in Table 8 of this report. It indicates a gradual phasing and delivery of retailing over the development period to allow for the incremental development of placemaking.

7.4 Sensitivity Tests

Sensitivity tests were undertaken based on figures provided as part of the transition from Emerging to Draft Planning Scheme. The following assumptions were tested:

- High growth - there would be a total of 9,192 residential units in Clonburris
- Low growth – there would be a total 7,682 residential units in Clonburris

The other assessment assumptions outlined in the mid-growth scenario would apply.

In the high growth scenario it is deemed that additional convenience demand may support an additional store of between 700 and 1,000 sqm net sales area. In the low growth scenario, approximately 700 sqm less of net retail sales area would be required.

It is assumed that there would be no significant additional comparison retailing provided for over the baseline scenario, as any additional demand would be directed to Clondalkin Town Centre and Liffey Valley in accordance with relevant CDP policy.

7.5 Conclusions

The Draft Planning Scheme reflects the recommendations of Section 6 of this report.

Appendix I – Definitions

This glossary covers forms of retail development and types of retail location. As retailing is dynamic, it should be noted that new forms of retailing may evolve which are inadequately described by current terminology, and should be assessed on their merits.

Types of Retail Floorspace

Total Shopping Centre Floorspace – internal space (measured from inside walls) of a covered shopping centre including circulation space toilets, lifts and escalators gross retail area, gross non-retail area floorspace devoted to incidental activities such as foodcourt, administrative offices, walkways, car parking both integrated and surface.

Gross Retail Floorspace – the total floorspace, as measured from inside the shop walls, which includes sales space, plus storage space, offices, toilets, canteen, and circulation space.

Net Retail Floorspace – the area within the shop or store which is visible to the public and to which the public has access including fitting rooms, checkouts, the area in front of checkouts, serving counters and the area behind used by serving staff, areas occupied by retail concessionaires, customer service areas, and internal lobbies in which goods are displayed, but excluding storage areas, circulation space to which the public does not have access to, cafes, and customer toilets.

Types of Retail Goods

Although there is a trend for "scrambled merchandising" whereby some retail businesses sell both convenience goods and comparison goods, greater definitional clarity is obtained by adopting a goods-based retail classification. Retail goods categories can be divided into convenience goods and comparison goods as follows:

Convenience goods:

- food
- alcoholic and non-alcoholic beverages;
- tobacco;
- non-durable household goods;

Comparison Goods:

- footwear;
- furniture, furnishings and household equipment (excluding non-durable household goods);
- medical and pharmaceutical products, therapeutic appliances and equipment;
- educational and recreation equipment and accessories;
- books, newspapers and magazines;
- goods for personal care;

- goods not elsewhere classified;
- bulky goods
- Goods generally sold from retail warehouses --where DIY goods or goods such as flatpack furniture are of such size that they would normally be taken away by car and not be portable by customers travelling by foot, cycle or bus, or that large floorspace would be required to display them e.g.
    - repair and maintenance materials;
    - furniture and furnishings;
    - carpets and other floor coverings;
    - household appliances;
    - tools and equipment for the house and garden;
    - bulky nursery furniture and equipment including --perambulators;
    - bulky pet products such as kennels and --aquariums; audio-visual, photographic and information --processing equipment; catalogue shops and other bulky durables for --recreation and leisure.

Types of Retailing

Supermarket - Single level, self service store selling mainly food, with a net retail floorspace of less than 2,500 M2.

Superstore - Generally single level, self service stores selling mainly food, or food and some non-food goods, with at least 2,500 M2 net retail floorspace but not greater than 5,000 M2 net retail floorspace and with integrated or shared parking.

Hypermarket - Single or multi-level self service store selling both food and a range of comparison goods, with net retail floorspace area in excess of 5,000 M_2 with integrated or shared parking.

Shopping Centre - Predominantly purpose-built centres comprising a mix of large and small units, typically anchored by a large convenience goods stores

Retail Parks - A single development of a least three retail warehouses with associated car parking.

Retail Warehouse - A large single-level store specialising in the sale of bulky household goods such as carpets, furniture and electrical goods, and bulky DIY items, catering mainly for car-borne customers.

Factory Shop - A shop located as part of or adjacent to the production facility and specialising in the sale of manufacturers' products direct to the public.

Outlet Centres - Groups of retail units in particular focusing on fashion and accessories which are generally associated with designer groups. They specialise in selling surplus stock and end-of-line goods at discounted prices.

Forecourt Retailing - Mini-supermarket linked to petrol filling stations.

Types of Centre

City and Town Centres - Provide a broad range of facilities and services and fulfill a function as a focus for both the community and public transport. The term excludes district centres, retail parks, and local centres.

District Centre - Provides a range of retail and non-retail service functions (e.g. banks, post office, local offices, restaurants, public houses, community and cultural facilities) for the community at a level consistent with the function of that centre in the core strategy. They can be purpose built as in new or expanding suburbs or traditional district centres in large cities or town

Local Centre or Neighbourhood Centre - Comprise a small group of shops, typically comprising newsagent, small supermarket/general grocery store, sub-post office and other small shops of a local nature serving a small, localised catchment population.

Types of Location

Retail Area - That part of a town centre which is primarily devoted to shopping.

Centre - For the purposes of these guidelines, a centre refers to a city or town centre and can also, refer to the centre of a district or neighbourhood centre which has been identified in the settlement hierarchy of a development plan

Edge-of-Centre - A location within easy walking distance of the primary retail area of a city town centre or district centre.

Out-of-Centre - A location that is clearly separate from a town centre but within the town development boundary, as indicated in a development plan or local area plan.