APPENDIX 3: COMMERCIAL DEVELOPMENT

This Appendix contains additional background material covering:

- County Development Plan 1999-2004 Retail Hierarchy (Table 1)
- County Development Plan Strategic Policies for Centres (Table 2)
- Data on Retail Floorspace from GDRS Report (3.1 and Table 3)
- Notes on trends in airport employment (3.2)
- Data on Development of Zoned Employment Sites to April 2003 (Tables 4, 5, 6 and Figure 1)
- Note on locational advantage of Gatwick area (3.3)

Table 1: Fingal County Retail Hierarchy

Fingal County Retail Hierarchy		
	METROPOLITAN AREA	**HINTERLAND AREA**
Level 2	**Major Town Centres**	**County Town Centres**
	Swords Blanchardstown	
Level 3	**Town Centres**	**Sub-County Town Centres**
	Malahide	Balbriggan
Level 4	**Neighbourhood Centres**	**Local Centres – Small towns and villages**
	Established/Mature Centres**:** Blanchardstown Village, Castleknock, Portmarnock, Sutton/Baldoyle ***Retail Enhancement Centres*****:** Corduff Shopping Centre, Donabate Howth, Roselawn Shopping Centre, Tyrrelstown	Lusk, Rush, Skerries
Level 5	Corner Shops and Local Centres	Smaller Village Centres/ Crossroads

Table 2: Summary of Strategic Policies

Summary of Strategic Policies	
Policy reference	**Policy**
Policy RS1: Major Town Centre – Blanchardstown	*It is the policy of the Council to promote and encourage major enhancement of retail and leisure provision and diversification of town centre functions in Blanchardstown*
Policy RS2: Major Town Centre – Swords	*It is the policy of the Council to promote and encourage major enhancement of retail and leisure provision in Swords*
Policy RS3: Sub-County Town Centre – Balbriggan	*It is the policy of the Council to facilitate and encourage further retail and commercial development in Balbriggan to promote its role as the key centre in the north of the County*
Policy RS4: Town Centre – Malahide	*It is the policy of the Council to facilitate and encourage further retail and commercial development in Malahide to enhance its importance as a main centre in the County*
Policy RS5: Metropolitan Area Neighbourhood Centres – Traditional Centres – Growth Centres	*It is the policy of the Council to facilitate and encourage the enhancement of the County's Neighbourhood Centres to ensure convenient access to shopping and other local services is*
Policy RS6: Hinterland Area Local Centres – Small Towns and Villages	*It is the policy of the Council to facilitate the local provision of shops and services in Level 4 Local Centres to meet the needs of the existing and expanding populations*

Policy RS7: Innovation in the County's Retail Offer	*It is the policy of the Council to encourage and facilitate innovation in the County's retail offer and attraction*

3.1. Greater Dublin Retail Strategy – data on Retail Floorspace

The distribution of retail floorspace in Fingal County is given in the Consultation Report in the GDRS. Table 3 contains a breakdown of the information relating to Fingal County.

The main retail centre in Fingal County is Blanchardstown, a sub-regional town centre which serves a catchment area extending over much of Greater Dublin, and also serves as a district centre for the local population. The significant convenience goods content of Blanchardstown serves an important local function. The GDRS indicates that some 41 per cent of the convenience turnover and 69 per cent of the comparison goods turnover of Blanchardstown derives from residents living outside Fingal County.

The second largest centre in the County retail hierarchy is Swords. The Pavilions, a major new retail centre has recently opened, incorporating Dunnes, Superquinn and TK Maxx anchor stores and 49 units. This has more than doubled the town's retail floorspace.

Prior to this extension all convenience turnover in Swords and 90% of comparison turnover is derived from residents. It is therefore a relatively self-contained centre, although the recent extension is bound to result in an expanded catchment area.

There are some 22 small and medium scale retail centres and retail parks elsewhere in the County. The most significant in relation to the airport is Malahide, which amounts to just 600m². The GDRS indicates that these other centres draw almost all their turnovers from within County Fingal.

Fingal is well served by established retail centres. Outside Dublin City, Fingal has the largest volume of retail provision of all Greater Dublin counties. Moreover there is a good range of provision and consumers have a wide choice of shopping opportunities in a variety of different locations. It is concluded that there is no retail deficiency within the County at present.

Table 3: Retail floorspace in County Fingal (m²)

Centre	Total Area	Convenience	Comparison	Retail Warehouse	Vacant
Baldoyle	1,402	230	247		925
Balbriggan	7,369	3,259	3,563		547
Blanchardstown	3,353	2,214	1,080		59
Blanchardstown SC	30,342	4,781	25,561		
Blanchardstown Retail Park	14,446			13,561	
West End Retail Park	10,869	836		7,106	2,927
Coolmine Industrial Estate	5,680	30		3,142	2,508
Carpenterstown	231	160	71		
Castleknock	969	710	229		30
Clonsilla	247	155	32		60
Corduff	131	54	186		77
Donabate	1,174	988	186		
Hartstown	964	768	147		49
Howth	1,366	783	519		64
Huntstown	251	112	90		49
Mulhuddart	50		50		
Lusk	1,686	496	50	1,140	
Malahide	6,185	1,551	4,580		54
Portmarnock	2,492	1,951	441		100
Roselawn Shopping Centre	2,884	2,010	874		
Rush	1,537	688	385		464
Sutton	2,576	1932	602		42
Skerries	5,329	2,764	2,114		451
Swords	21,215	5,839	9,420	4,973	983
Total	**122,746**	**32,311**	**50,241**	**29,887**	**10,308**

3.2 Future trends in airport-related employment

Source: Future Trends in Airport-Related Employment, Airport Regions Conference, December 2000

1. Key drivers of future airport employment growth are likely to be:
Rapidly rising demand for air travel – the growth in the number of passengers handled is the key driver of airport employment growth;
Further liberalisation of air services – increasing both the size of the market and competitive pressures;
The regulatory environment – new licence structure in relation to aircraft maintenance, a future tightening of regulations on security and environmental management;
Competition – a continuing focus on cost control, revenue maximisation out sourcing, privatisation and customer satisfaction and the development of the low-cost carriers;
Labour market context – tight labour markets create incentives to invest in capital equipment to increase labour productivity, sometimes creating new occupations and niche demands for skills such as IT.

2. Occupations that are likely to be in demand in the future include:
Airlines:
Pilots
Cabin crew
Check-in staff
Sales and marketing staff
Pricing and yield management staff
IT staff

Ground Handling:
Baggage handlers
Apron and ramp staff
Security staff

Aircraft Maintenance:
Aircraft technicians and mechanics

Freight:
Drivers
Goods handlers
Fork-lift truck drivers
x-ray equipment operators
IT staff

Restaurants and Retailing:
Customer service staff
In-flight catering
Purchasing managers
Production planners and controllers

Airport Operators:
Air traffic controllers
Commercial and marketing staff
Land development and real estate staff
Finance and IT staff

Developed & Undeveloped Zoned Employment Land (FCC August 2004)

Table 4 – Indicates the Amount of Developed and Undeveloped Lands Zoned 'E'

No.	Area	Zoning Type	Total (ha) Zoned	Total Developed 2004(ha)	Total Undeveloped 2004(ha)	% Developed 2004 (ha)	% Undeveloped 2004 (ha)
1	Swords	E	150.77	97.36	53.41	64.57 %	35.43 %
2	Balgriffin and Clonshaugh	E	80.9	0.00	80.9	0%	100%
3	Airport and Environs	E	87.4	29.2	58.2	33.41%	66.59%
4	Santry	E	77.5	63.7	13.8	82.19 %	17.81%
5	Ballymun and Finglas	E	72.2	29.8	42.4	41.27%	58.73%
6	Kildonan and Cappoge	E	84	11	73	13.09%	86.91%
7	Blanchardstown	E	29.1	24.7	4.4	84.88%	15.12%
8	Coolatrath	E	15	0	15	0	100%
	Total	E	596.87	255.76	341.11	42.85%	57.15%

There is 596.87 hectares of lands zoned objective 'E' within the hinterland of the airport, 57% of which is undeveloped.

Table 5 – Indicates The Amount Of Developed And Undeveloped Lands Zoned 'ST'

No.	Area	Zoning Type	Total (ha) Zoned	Total Developed 2004 (ha)	Total Undeveloped 2004 (ha)	% Developed 2004 (ha)	% Undeveloped 2004 (ha)
1	Swords	ST	0.00	0.00	0.00	0%	0%
2	Balgriffin and Clonshaugh	ST	0.00	0.00	0.00	0%	0%
3	Airport and Environs	ST	0.00	0.00	0.00	0%	0%
4	Santry	ST	32.5	0.5	32	1.54%	98.46%
5	Ballymun and Finglas	ST	0.00	0.00	0.00	0%	0%
6	Kildonan and Cappoge	ST	0.00	0.00	0.00	0%	0%
7	Blanchardstown	ST	354	237.5	116.5	67.09%	32.91%
8	Coolatrath	ST	0.00	0.00	0.00	0%	0%
	Total		386.5	238	148.5	61.58%	38.42%

There is 386.5 hectares of lands zoned objective 'ST' within the hinterland of the airport, 38.42% of which is undeveloped.

Table 6 – Indicates The Amount Of Developed And Undeveloped Lands Zoned 'ST1'

No.	Area	Zoning Type	Total (ha) Zoned	Total Developed 2004 (ha)	Total Undeveloped 2004 (ha)	% Developed 2004 (ha)	% Undeveloped 2004 (ha)
1	Swords	ST1	29	7.2	21.8	24.83%	75.17%
2	Balgriffin and Clonshaugh	ST1	24.5	0.00	24.5	0%	100%
3	Airport and Environs	ST1	0.00	0.00	0.00	0%	0%
4	Santry	ST1	0.00	0.00	0.00	0%	0%
5	Ballymun and Finglas	ST1	39.5	0.00	39.5	28%	72%
6	Kildonan and Cappoge	ST1	0.00	0.00	0.00	0.00%	0%
7	Blanchardstown	ST1	561	107	454	19.07%	80.93%
8	Coolatrath	ST1	0.00	0.00	0.00	0%	0%
	Total		654	114.2	539.8	17.46 %	82.54%

There is 654 hectares of lands zoned objective 'ST1' within the hinterland of the airport, 82.5% of which is undeveloped.

Table 7 – Indicates The Amount Of Developed And Undeveloped Lands Zoned 'L1'

No.	Area	Zoning Type	Total (ha) Zoned	Total Developed 2004 (ha)	Total Undeveloped 2004 (ha)	% Developed 2004 (ha)	% Undeveloped 2004 (ha)
1	Swords	L1	59	20.3	38.7	34.41%	65.59%
2	Balgriffin and Clonshaugh	L1	0.00	0.00	0.00	0%	0%
3	Airport and Environs	L1	0.00	0.00	0.00	0%	0%
4	Santry	L1	0.00	0.00	0.00	0%	0%
5	Ballymun and Finglas	L1	0.00	0.00	0.00	0%	0%
6	Kildonan and Cappoge	L1	0.00	0.00	0.00	0%	0%
7	Blanchardstown	L1	21	0.00	21	0%	100%
8	Coolatrath	L1	0.00	0.00	0.00	0%	0%
	Total	L1	80	20.3	59.7	25.37 %	74.63%

There is 80 hectares of lands zoned objective 'L1' within the airport, 74.6 % of which was undeveloped in April 2004.

The calculations indicate that of 1,040.5 hectares of land zoned for Science and Technology employment in the hinterland of the airport, 688.3 hectares (65.8%) remain undeveloped. Furthermore, of the 676.87 hectares zoned for general and light industry, 400.8 hectares (59.21%) remains undeveloped.

Appendix 3

Figure 1 Developed Employment Land

3.3 Perceived benefits of locating next to Gatwick airport (Coopers & Lybrand Research Study)

SURVEY OF BENEFITS OF LOCATING NEXT TO GATWICK AIRPORT

The results of this survey (carried out by Coopers & Lybrand) showed that, although the direct benefits from an airport of this size are relatively concentrated, the overall impacts are very high. A key finding of the study was the significance (and growing importance) of the airport in the retention and attraction of mobile investment, particularly for the North Sussex/South Surrey area. Some three quarters of local firms rated Gatwick as "critically important" or "important" to the local economy and only 5% as not important, whilst 12% of local companies identified Gatwick as a significant factor in their own locational decision making. Further, 27% of companies said the importance of Gatwick to their firms was increasing and only 2% as decreasing. A major factor in this respect is that whilst the importance of Gatwick was rated as high by firms right across the three-county area, two thirds of the firms identifying Gatwick as an important factor in their location decision were sited within 20 miles of the airport itself (ie a 30-40 minute drive time).

The importance of Gatwick as a locational attractant was confirmed by consultations with 11 leading "broker" agencies advising mobile investors, all of whom ranked Gatwick as amongst the top 5 factors attracting investment to Sussex and Southern Surrey. The growing importance of Gatwick as a centre for international scheduled flights was considered an especially significant factor by these agencies.

It is difficult to precisely quantify the impact in employment terms of Gatwick as an attraction of mobile investment because of the other factors impinging on this decision making process, and the fact that North Sussex is also relatively well placed in terms of access to Heathrow. It is however clear that:-

(a) On the evidence of the company survey, Gatwick was a significant factor in the locational decision of 12% of surveyed firms. If this pattern is replicated across the local economy, then Gatwick must be considered to be a significant contributor to the attraction and retention of some 31,000 jobs in Surrey and Sussex; and

(b) Many of the industrial and commercial sectors where the proximity of Gatwick is of most significance – HQ operations, electronics, instrumentation and precision engineering, multi-media, professional services, and pharmaceuticals – have been identified as key targets for the future of the Sussex economy.