

# 4. Economic development



Following more than a decade of growth, when the number of working people went up to 27,328 in 2006 from 20,204 in 1996 (a rise of 35%), the economic decline that began in 2008 caused a substantial loss of jobs in Co. Sligo, with 5,279 persons on the Live Register in January 2010 (there were only 1,944 in January 2006).

The main area of employment, as documented by Census 2002 and 2006 data, remains the services sector, while manufacturing is in decline, the construction industry has collapsed and agriculture plays a relatively small role in the local economy. The County had a relatively high proportion of its workforce employed in the public sector, meaning that the loss of jobs has been probably less severe than in other parts of the country.

According to the Economic and Social Research Institute's Medium Term Review 2008-2015 (published in May 2008), "despite the very real difficulties that are currently being encountered ... the economy will eventually rebound and return to its medium-term growth path".

The Review highlighted the changing drivers of the Irish economy, with the export of business and financial services being a vital contributor to growth, while the protection of the environment continues to gain importance.

The ESRI report also noted that "Structural policies, such as investment under the NDP, will play a key role in developing good health care, excellent education, and a clean environment will be increasingly important in making Ireland an attractive location to live and work."

However, in the Quarterly Economic Commentary – Winter 2009, the ESRI pointed to a contraction of the Irish economy in the order of 3% in 2008 and 10% in 2009, with an unemployment rate of 12.5% at the end of 2009, compared to just 4.6% at the end of 2007. The Institute expected a stabilisation of the economy in 2010 and a return to modest growth in subsequent years.

County Sligo should be prepared to share in the predicted return to growth over the following years by putting in place a robust economic development framework as part of its development plan.

## 4.1 Approach to economic development

The promotion of economic development in general, and industry and enterprise in particular, depends heavily on the policies, objectives and guidelines set out in other Sections of this Development Plan. Supporting economic development requires a multi-pronged approach, the key components of which are:

- earmarking key settlements for focused growth (see Chapter 3);
- providing and supporting the provision of essential infrastructure (see Chapters 8, 9 and 10);
- reserving sufficient land in suitable locations for industry and enterprise uses (see Mini-Plans in Volume 2);
- availability of high-speed telecommunications, especially for enterprise (see Chapter 11);
- availability of clean and reliable sources of energy (see Chapter 11);
- promoting and facilitating appropriate educational/training measures to ensure a suitably skilled local workforce (see the strategic economic development policies in this chapter);
- encouraging research and development linkages between industry/business and local third-level institutions (see the strategic economic development policies in this chapter);
- forging mutually-beneficial linkages and partnerships – e.g. with regional and cross-border bodies (see the strategic economic development policies in this chapter);
- securing high standards of landscape and environmental protection/enhancement (see Chapters 7 and 9);
- ensuring that towns and villages remain attractive to investment;
- offering a good quality of life to those who live and work in the County.

As a result of its location, regional and cross-border activities will continue to play a vital role in the economic development of County Sligo. This Development Plan supports the objectives of the key regional development bodies, including:

- the BMW Regional Assembly
- the Border Regional Authority (BRA)
- the Western Development Commission (WDC)
- the Omagh-Sligo Partnership
- the Irish Central Border Areas Network (ICBAN)

The Plan draws on the principles for developing the economy of the Border Region outlined in the RPGs.

The economic development measures outlined in this Section need to be paralleled by initiatives in education, training and physical infrastructure. County Sligo's ability to attract investment continues to be restricted by its relatively weak infrastructure, including under-provision of broadband services, a lack of high-voltage electricity supply and deficiencies in road infrastructure. These barriers to the economic development of the County are addressed in the Development Plan through policies relating to energy, telecommunications and transport infrastructure.

### 4.1.1 Industry and enterprise

The Census of Industrial Production 2007 indicated that a total of 3,714 industrial workers and other employees were engaged in 77 industrial units in Sligo and were earning a combined 120,063,000 euro per year.

The gross industrial output of County Sligo, at 940,061,000 euro, was the third lowest in the Border Region in 2007, and made up only 10.9% of the region's total industrial output and only 0.76% of the national output.

Although the manufacturing sector will continue to decline nationally, it remains important to Sligo's local economy, at least until other types of employment – e.g. “green” jobs – can be created.

These changing circumstances will require the promotion of skills and processes able to reinsert the former industrial labour force into suitable employment. There will be policy implications for the various agencies in charge of industrial development, training, infrastructural provision, and research and development.

Industry and enterprise in County Sligo are supported by the IDA, Enterprise Ireland and Sligo County Enterprise Board, who assist in all aspects of industrial promotion, including the provision of financial support, securing international trade and creating new partnerships.

Business co-operation and trade between County Sligo and Northern Ireland is fostered through cross-border initiatives such as the Sligo-Omagh Partnership and the Sligo County Council-led Taskforce.

FÁS Ireland seeks to maximise the development of enterprises tailored to meet the regeneration needs of local economies within disadvantaged communities.

Sligo County Enterprise Board (CEB) plays an important role in the development of local enterprise in County Sligo. Under the NDP 2007-2013, the CEB received national and European funding for direct financial assistance in the form of grant-aid as well as funding for entrepreneurial development including training, mentoring and advice.

By the end of 2008, around 802 full-time and 377 part-time jobs had been provided through direct financial assistance from the Board. In 2008 alone, the Board invested a total of 268,310 euro under its Entrepreneurial and Capability Development Measure, supporting 34 projects.

### 4.1.2 Higher education and research

Established in 1970, the Institute of Technology has developed to have almost 6,000 students and some 550 staff, hosted in a 70-acre campus on the outskirts of Sligo. The Institute delivers flexible programmes, from higher-certificate and degree-level courses to taught postgraduate and research awards through both traditional and online delivery.

IT Sligo provides a broad range of programmes in Science, Engineering, Business and Humanities, and also offers a number of apprenticeship programmes. Its customer focus and entrepreneurial approach means that, in response to market demand, it has developed specific programmes, such as PR Event Management, Construction Management, Forensic Science, Pharmaceutical Science, Eco-Tourism, Financial Services and Electronics.

St. Angela's College, Sligo, a College of the National University of Ireland, Galway, is a provider of university-level education and research in the North-West. St. Angela's College delivers programmes at both undergraduate and postgraduate levels across the academic fields of Nursing and Health Studies, Home Economics and Education. The College offers a wide range of access, adult education and professional development programmes.

Although established as a College of Education for Home Economics teachers, in recent years the College has expanded far beyond its original remit and currently its profile of academic programmes of study also includes Special Needs Education, Theology, Food and Consumer Studies, Science, Irish, Economics and Social Studies. Current student numbers attending the College are approximately 900.

Research and development initiatives in local third-level institutions can provide further support to local enterprise. There are two such units in County Sligo: a Business Innovation Centre in Sligo IT and a Food Centre at St Angela's College.

### 4.1.3 The creative sector

In 2009, the Western Development Commission (WDC) published Creative West, a report on the Creative Sector in the Western Region, with the creative sector defined as "occupations and industries centred on creativity, for the production and distribution of original goods and services".

The WDC has an interest in promoting the creative sector within the region because it has strong growth potential, generates high-quality employment, stimulates innovation in other sectors, plays a key social role and can stimulate both rural and regional development. The report estimates that in 2008 there were 4,779 creative businesses in the Western Region, which directly employed 11,000 people, equal to 3% of total

employment in the region. It is believed that the creative sector generates an annual turnover of 534m euro and directly contributes 270m euro to the gross value added (GVA) of the region.

Creative businesses in the region tend to be small-scale, with 39% of the surveyed sample of 293 businesses being self-employed and only 12% employing more than 10 people. Music, visual and performing arts accounted for a high number of businesses but a low share of total turnover, as many of those involved operate on a part-time basis and are not primarily commercially focused. In contrast, the internet and software sector accounted for a relatively small share of total businesses, but a far higher share of total turnover, indicating commercial focus and higher productivity.

Across the region, the importance of the creative sector for total employment was found to be highest in counties Leitrim, Sligo, Galway and Donegal.

Among the recommendations of the WDC for developing the Western Region's creative sector, some are relevant to this Development Plan and can be implemented through appropriate policies:

- nurture and develop future creative talent in the region through education;
- develop creative connectors and hubs in the region to facilitate businesses and operators to work in suitable cost effective environments;
- accelerate growth of creative businesses through enhanced broadband capacity (particularly the high-productivity creative technology sector);
- enhance the quality of the built environment;
- improve the transport network.

Projected to grow at a faster rate than the economy as a whole, the creative and cultural economies are central to economic planning and will be one of the key growth areas for Ireland in the next decade. Development plan policies facilitate the growth of these economic sectors in Sligo City and County. Sligo County Council supports the economic actions of the County Development Board's *Action Plan 2009-2011*.

### 4.1.4 Industry and enterprise locations



Sligo City, Tobercurry and Grange are the primary locations for manufacturing industry in the County.

Sligo City has become the main centre for industry and enterprise due to its large pool of skilled workers, ease of access and relatively good telecommunications infrastructure. The availability of labour, transport facilities and infrastructure attracts enterprise and stimulates agglomeration effects in the local economy. Due to the spatial concentration of production in Sligo City, cost savings are made

by companies locating there, rather than in rural areas. Economies of scale help to explain why growth is unevenly distributed between the Gateway City and the rest of the County.

Tobercurry and Grange have developed a variety of smaller industries, due to their location along national transport corridors and the availability of a local workforce. Strandhill is showing potential as a centre for enterprise, with the development of an Enterprise and Technology Centre adjacent to the Regional Airport.

Collooney, originally earmarked for the development of an enterprise park, has seen the short-lived development of retail warehousing, to the detriment of Sligo Retail Park. Currently vacant units in Collooney Business Park should revert to their intended industrial/enterprise use and the proliferation of retail warehousing outside the Gateway area should be curtailed.

As the shift from manufacturing to market services occurs, enterprise centres should be fostered and expanded in the Key Support Towns of Tobercurry, Ballymote and Enniscrone, in addition to Strandhill.

Small-scale enterprise space should also be provided in other settlements across the County, either in dedicated areas or as part of mixed-use zones, to help offset the loss of employment in other sectors such as construction and agriculture, and support the creation of local jobs in the south and west of the County.

### Strategic economic development policies

It is the policy of Sligo County Council to:

- SP-ED-1** Ensure that sufficient and suitable land is reserved for new enterprise development at key locations throughout the County, particularly in the Key Support Towns of Tobercurry, Ballymote and Enniscrone, and promote these towns as secondary employment centres, after Sligo City.
- SP-ED-2** Facilitate enterprise development in other urban locations where infrastructural facilities, services and good communications are readily available or can be provided at a reasonable cost.
- SP-ED-3** Encourage the development of small-scale enterprise space in villages and facilitate teleworking.
- SP-ED-4** Adopt a flexible approach to start-up businesses and resource-based, small-scale industrial/enterprise activities. Where a proposed development needs to locate near an existing natural resource, it will be necessary to demonstrate that it can be accommodated without damage to the environment, natural or built heritage, visual amenity, and that it will not have a negative impact on the character of the area.
- SP-ED-5** Encourage and facilitate small indigenous industries, in recognition of their increasing importance in providing local employment and helping to stimulate economic activity among local communities.
- SP-ED-6** Support an expanded education and research sector in County Sligo.
- SP-ED-7** Facilitate the growth of creative businesses, particularly the high-productivity creative technology sector, by seeking the provision of enhanced broadband capacity and by encouraging the growth and clustering of the creative and cultural industries in the County.
- SP-ED-8** Liaise with the IDA, Enterprise Ireland and the County Enterprise Board, to ensure a co-ordinated approach to the provision of necessary infrastructure and services to support enterprise and industrial development.
- SP-ED-9** Promote the integration of employment with other land uses and the transportation network and ensure, in particular, that employment-intensive uses are located in proximity to existing and planned strategic routes, where public transport is most viable.
- SP-ED-10** Acquire sites for industry and enterprise, subject to the availability of funds.
- SP-ED-11** Ensure that a high standard of design, layout and amenity is provided and maintained at locations selected for enterprise development.
- SP-ED-12** Continue to support and facilitate cross-border co-operation and trade between County Sligo and Northern Ireland.

## 4.2 Rural development and enterprise

County Sligo, like the Border Region, is predominantly rural. Therefore, spatial policies must take into account, on an ongoing basis, the changing structure of agriculture, as recommended in the RPGs, in conjunction with landscape management principles and natural resource development needs.

The reduction in public service provision and the declining agricultural sector are accelerating the population decline in some rural areas, thereby threatening the survival of rural communities. In recent years, rural areas have experienced a reduction of public services, such as sub-post offices, Garda stations, primary schools and banks. Access to public services is therefore a priority for those living in rural areas.

In order to strengthen the provision of services, regenerate rural communities and promote the economic development of rural areas, there is a need to support rural and agricultural diversification through a variety of initiatives. These include rural and agri-tourism initiatives; promoting rural transport; developing telecommunications to rural areas; and promoting the development of small incubator units as an adjunct to other rural activities, such as agriculture, horticulture, forestry, mariculture and alternative energy production.

Both Sligo Leader Partnership and Sligo County Enterprise Board provide funding and technical assistance in the promotion of local employment and enterprise initiatives focused on the individual (i.e. individual business plans) and the project. Projects assisted by these bodies include farmers' markets, tourist attractions, rural incubator units promoting crafts, the arts, pottery, antiques, indigenous manufacturing and engineering, in addition to agri-businesses. The Council will work with these bodies, and others, to promote rural development and enterprise.

### Rural development and enterprise policies

It is the policy of Sligo County Council to:

- P-RDE-1** Develop the potential for innovation and diversification in the rural economy, as a means of retaining population into rural areas and supporting rural services.
- P-RDE-2** Support the active involvement of rural communities in the provision of local services and the development of rural resource-based enterprise, such as organic farming, equestrian activities, bird watching etc, subject to normal planning considerations and the protection of the environment.
- P-RDE-3** Promote the continuance of Rural Transport Initiatives as an essential service to people in rural areas, who would otherwise be excluded because transport is not available, accessible or affordable to them locally.
- P-RDE-4** Facilitate the development of broadband telecommunications, as an enabler of rural enterprise, to counteract the effects of remoteness.

### 4.2.1 Forestry

Sligo County Council recognises the importance of forestry development, as set out in government policy, and acknowledges the potential for further afforestation in County Sligo. The Council intends to prepare an Indicative Forestry Strategy for the County, which will indicate opportunity and constraint areas for future forestry development. When completed, this strategy will be incorporated in the County Development Plan. In the interim, it is considered that new coniferous forestry development is unlikely to be sustainable in SPAs, pNHAs and cSACs. Coniferous forestry plantations will also be discouraged in water quality-sensitive areas, in designated Sensitive Rural Landscapes, Visually Vulnerable Areas and along Designated Scenic Routes indicated on the Landscape characterisation Map in Chapter 7.



### Forestry policies

It is the policy of Sligo County Council to:

- P-FOR-1** Support and promote sustainable forestry development in County Sligo, subject to the protection of, inter alia, scenic landscapes and views, water quality, heritage features, residential amenity and public safety.
- P-FOR-2** Discourage new forestry development, except for broadleaf, in proposed/candidate and adopted NHAs, SACs and SPAs, in designated Sensitive Rural Landscapes and Visually Vulnerable Areas, along designated Scenic Routes and in water quality-sensitive areas. (Broadleaf forestry will be open to consideration in these areas and in all proposed and adopted NHAs, SPAs and SACs, will be subject to consultation with the DoEHLG and shall have regard to any management plans prepared by the Department.)
- P-FOR-3** Adopt a proactive approach in conjunction with the Forest Service and Coillte to ensure sustainable forestry development.
- P-FOR-4** Encourage access to forestry, including private forestry, for walking routes, mountain bike trails, bridle paths and other activities that do not generate noise.
- P-FOR-5** Forestry should not obstruct existing rights-of-way, traditional walking routes, recreational and tourism facilities.
- P-FOR-6** Identify existing rights-of-way and established walking routes before planting commences.
- P-FOR-7** Forestry will not be permitted on ridgelines and should not have a negative visual impact. On steep slopes, above the 300 metre line, planting will be strongly discouraged and, where possible, existing areas under forestry will be reduced and/or redesigned following clearfelling.

### Forestry objective

It is an objective of Sligo County Council to:

- O-FOR-1** Prepare an Indicative Forestry Strategy for County Sligo in conjunction with the Forest Service and incorporate it in the County Development Plan. The Strategy should provide for the maintenance of public rights-of-way and traditional walking routes. The Indicative Forestry Strategy shall undergo SEA and AA screening.

## 4.2.2 Aquaculture, mariculture and fishing

Aquaculture relates to the commercial production of fish and shellfish species. The term is generally used to describe fish farming operations both on inland and coastal (marine) waters. For the purposes of this Plan, aquaculture relates to fish farming on inland water bodies, such as lakes, rivers and land-based artificial ponds and tanks. Because of environmental concerns and the very limited capacity for aquaculture on Sligo's inland lakes, major aquaculture projects will be discouraged, unless the Council is satisfied that such proposals will be environmentally sustainable and have a limited impact on the visual amenity of the area. Such environmental concerns associated with finfish aquaculture include:

- protection of the aquatic environment;
- the need to guard against escapees;
- the avoidance of any genetic threats, potential disease and parasitic implications to local fish stocks (there is a need to source seed from certified disease-free stock);
- potential conflicts in relation to water supply, which can become critical during low-flow periods.

Mariculture is the cultivation of marine organisms in their natural environment. Mariculture in County Sligo comprises the commercial production of mussels, clams and oysters. Mariculture developments are concentrated in Drumcliff Bay off Lissadell, Cummeen Strand, in Sligo Harbour and at Culleenamore in Ballysadare Bay. These developments are subject to a licence from the Department of Agriculture, Fisheries and Food (DAFF). In practice, the Council is consulted prior to issuing of licences. The aquaculture industry faces many challenges on the environmental front, and the County Council, in its limited capacity, will seek to promote sustainability and waste management programmes within the sector.

The fishing industry in Sligo is less well-developed than in nearby Donegal and Mayo. However, there are some localised areas where fishing is important. The resort town of Enniscrone supports good beach and rock fishing. Commercial fishing boats operate at Raghly, Mullaghmore, Pollnadviva, Pullaheaney, Rosses Point, Aughris and Easkey. The present small-scale fisheries support some sport fishing, which has potential for expansion as a tourist activity.

### Aquaculture, mariculture and fishing policies

It is the policy of Sligo County Council to:

- P-AMF-1** Encourage and facilitate sustainable mariculture development associated with job creation, in a manner that is compatible with other uses of the Sligo coast, and subject to compliance with the requirements of the Habitats Directive, Water Framework Directive, the provisions of the EC (Quality of Shellfish Waters) Regulations and objectives of Shellfish Pollution Reduction Programmes.
- P-AMF-2** Work with the mariculture industry to increase environmental sustainability.
- P-AMF-3** Support and facilitate the development of the existing fishing industry, where such development is compatible with provisions for the protection of the Natura 2000 network.
- P-AMF-4** Encourage the expansion of sport fishing, subject to compliance with the requirements of the Habitats Directive.

## 4.2.3 Diversification of agricultural activity

In 2006, the agriculture, forestry and fishing sector engaged just 6.5% (down from 8% in 2002) of the labour force in County Sligo, with the majority of these people being self-employed

In the period 1991-2001, there was a 46% reduction in the number of persons employed in agriculture and nearly half of the 4,504 agricultural holdings in the County were part-time ventures in 2000.



Compounding this decline is the fact that farm sizes are significantly smaller than the national average: for example, only 4% of farms in County Sligo are above 50 hectares, compared to 12% nationally. Furthermore, a high percentage of farming families are dependent on social welfare or alternative enterprises for family income. These factors contribute to a high level of rural deprivation and a strong need for rural diversification in County Sligo.

### Policies for agricultural diversification

It is the policy of Sligo County Council to:

- P-AGD-1** Promote agriculture and sustainable agricultural diversification (to include recreational uses), while seeking to protect and maintain bio-diversity, wildlife habitats, water quality and nature conservation.
- P-AGD-2** Provide infrastructure to serve the needs of agriculture, in-cooperation with the appropriate agencies.
- P-AGD-3** Support mechanisms to reduce agricultural pollution and the eutrophication of rivers and lakes.
- P-AGD-4** Support secondary and tertiary economic activities associated with the primary activities of agriculture, forestry, mineral extraction, fishing, aquaculture and mariculture, subject to environmental considerations.
- P-AGD-5** Facilitate farm diversification and possible spin-offs (e.g. biomass and energy production, poultry, mushroom growing, flower growing, equestrian facilities), in association with vigorous and adequate environmental controls upon their development.
- P-AGD-6** Support farm families seeking to establish alternative and/or complementary economic enterprises to supplement their income from farming, subject to appropriate scale and intensity of development, having regard to traffic, environmental, landscape and residential amenity considerations. Where the enterprise is not dependent on a rural location, and the scale and intensity grow beyond family income needs, it will be encouraged, where appropriate, to relocate to a nearby town or village.
- P-AGD-7** Facilitate the development of niche activities, such as those relating to food (particularly value-added products), forestry (e.g. wood products), crafts, eco-tourism and agri-tourism – e.g. farmhouse accommodation, pet farms, farm holidays, health farms, equestrian activities, bird-watching holidays, painting/photography tuition, angling tourism, field studies and hill-walking. Other pursuits that will be facilitated are: walking, cycling, mountain and other off-road biking, nature trails, wildlife trails, maritime trails, back-packing, orienteering, paragliding and hang-gliding, canoeing and kayaking, caving, mountaineering, rock climbing, adventure sports, swimming in waterways, wild camping, pony trekking, boating and archaeological guided walks.

## 4.2.4 Mineral extraction and quarries

In the past decade, the demand for aggregates (stone, sand and gravel) has increased in line with the growth in national construction activity. Owing to the low unit value of aggregates, the most significant cost is transport and, as a result, most quarries operate within a 30-50 km radius of their market.

Sligo County Council recognises that the aggregates and concrete products industry contribute to the development of the County by the creation of employment and the provision of essential building materials for all new construction, urban development, roads and infrastructural projects. The Council seeks to ensure that the extractive and concrete products industry follows an environmental code of practice, so as to minimise the potential adverse impacts on the environment and local communities.

In assessing development applications relating to existing or proposed quarries, the Council will take full account of the document *Quarries and Ancillary Activities: Guidelines for Planning Authorities* (DoE, 2004).

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Aggregate extraction from the coastal zone, particularly from beaches, estuaries and cobble storm berms, has created many problems in the past, resulting in increased levels of erosion and flooding in coastal areas. The Sligo coastline is vulnerable to further similar activities, which have the potential to interfere with natural coastal processes and particularly the softer shoreline areas such as dune systems, which tend to be ecologically rich.

The GSI, in association with the Marine Institute, has been conducting a National Seabed Survey since 2000. This will facilitate the identification of marine and terrestrial aggregate deposits, if any, within the coastal zone. Any proposals for future coastal/marine aggregate extraction along the Sligo coast will be considered only after detailed environmental impact assessment and consultation with the DCENR, if appropriate.

### Mineral extraction and quarrying policies

It is the policy of Sligo County Council to:

- P-MEQ-1** Protect all known unworked deposits from development that might limit their scope for extraction (e.g. one-off housing).
- P-MEQ-2** Ensure that extraction and associated processes are carried out in a sustainable manner and do not impinge on existing rights-of-way or walking routes.
- P-MEQ-3** Minimise the impact of quarrying on residential and natural amenities and water quality through rigorous licensing, development control and enforcement measures.
- P-MEQ-4** Encourage development proposals – subject to normal planning criteria – that can demonstrate a commitment to good environmental management through the implementation of recognised environmental management practices approved by the Planning Authority.
- P-MEQ-5** Seek the reuse of worked out quarries for recreational, industrial, ecological and other uses, following appropriate restoration.
- P-MEQ-6** In respect of development proposals on or in the proximity of quarry sites, the Council will require that appropriate investigations are carried out into the nature and extent of old quarries (where applicable), the nature and extent of soil and groundwater contamination and the risks associated with site development works. Adequate measures to mitigate these risks shall be submitted as part of the planning application.

### Mineral extraction and quarrying objectives

It is an objective of Sligo County Council to:

- O-MEQ-1** Co-operate with the Geological Survey of Ireland (GSI) in the identification of major mineral deposits in County Sligo through Aggregate Potential Mapping (APM) and safeguard these resources for future extraction.
- O-MEQ-2** Identify the location of marine aggregate deposits, if any, along and off the coast of County Sligo, with the assistance for the GSI/Marine Institute, based on the National Seabed Survey.
- O-MEQ-3** Ensure that any future proposals for extraction of marine/coastal aggregates along or off the Sligo coast are subject to detailed environmental impact assessment. This shall include an assessment of the impact(s), if any, of the natural coastal processes.
- O-MEQ-4** The processing and storage of extracted aggregates on lands within the coastal zone shall be carried out in a manner that minimises the impact on natural and residential amenities.

## 4.3 Sligo County Retail Strategy



Supermarket in Grange

All planning authorities are required to prepare a Retail Strategy for inclusion in the development plan for their area, as set out in the *Retail Planning Guidelines for Planning Authorities* published by the DoEHLG in December 2000 (reviewed in January 2005).

### 4.3.1 Retailing in County Sligo

Unlike many Irish counties, Sligo is mono-nodal, with Sligo City being by far the largest and dominant urban centre in the County. A *Joint Sligo City and County Retail Strategy* was prepared as part of the Sligo and Environs Development Plan 2010-2016. This ensures that the Retail Strategy for the County draws upon and complements the City and Environs Retail Strategy.

Outside the Gateway, five centres in the County are of significance in terms of retail, due to their size, location or acknowledged importance in the NSS – Tobercurry, Ballymote, Enniscrone, Grange and Collooney. In terms of population, there are other significant settlements in the County – Rosses Point, Strandhill, Ballysadare – that have not come under detailed consideration, due to their proximity to Sligo City.

Recognition of the dominance of Sligo City should not diminish the importance of the smaller retail centres in the County. They play a useful role in sustaining local communities and in reducing the need to travel.

### 4.3.2 Projected retail floor space requirements

In 2008 two surveys were undertaken to inform the Retail Strategy: a survey of shoppers in Sligo City centre and a telephone survey of 800 households within Sligo's catchment area, which extends into North Leitrim and North Roscommon – this is referred to as the "study area". The Household Survey informed the projected floor space requirements to 2015 and 2020, alongside existing and projected population estimates prepared for each zone of the catchment/study area.

It is assumed that most expenditure originating in rural County Sligo takes place in larger centres, particularly Sligo City and Environs, and also in centres such as Ballina, Boyle and Carrick-on-Shannon. It is assumed that this will continue to be the case. Therefore, only expenditure on convenience goods (predominantly foodstuffs) was examined.

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**Table 4.A Retail provision in County Sligo - data from surveys undertaken in 2003 and 2008**

	Ballymote		Collooney		Enniscrone		Grange		Tobercurry		TOTAL	
	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008
<b>Convenience retail</b>												
No. of outlets	8	4	6	6	4	5	3	4	13	10	34	29
Floor space (sq.m.)	1,226	1,436	642	743	242	249	452	411	1,835	1,137	4,397	3,976
No. as % of all outlets	13%	6.9%	18%	17.1%	19%	20%	17%	23%	17%	16.9%	16%	14.9%
<b>Total Comparison retail</b>												
No. of outlets	16	17	10	7	3	8	6	4	19	14	54	50
Floor space (sq.m.)	1,937	2,444	241	4,091	211	252	622	815	2,103	2,665	5,114	10,267
No. as % of all outlets	26%	29.3%	30%	20%	14%	32%	33%	23.5%	25%	23.7%	26%	25.8%
<b>Mainstream Comparison</b>												
No. of outlets	n/a	11		1		7		2		9		30
Floor space (sq.m.)	n/a	1,001		94		170		39		385		1,689
No. as % of all outlets	n/a	19%		2.9%		28%		11.8%		15.3%		15.5%
<b>Bulky comparison</b>												
No. of outlets	n/a	6		6		1		2		5		20
Floor space (sq.m.)	n/a	1,443		3,997		81		777		2,280		8,578
No. as % of all outlets	n/a	10.3%		17.1%		4%		11.8%		8.5%		10.3%
<b>Retail services</b>												
No. of outlets	26	28	11	14	13	11	8	7	35	29	93	89
Floor space (sq.m.)	n/a	959	n/a	506		678		252		1,38		3,433
No. as % of all outlets	43%	48.3%	33%	40%	62%	44%	44%	41.2%	47%	49.2%	45%	45.9%
<b>Vacancies</b>												
No. of outlets	11	9	6	8	1	1	1	2	8	6	27	26
Floor space (sq.m.)	410	381	369	4,775	20	101	18	227	602	1,402	1,419	6,886
No. as % of all outlets	18%	15.5%	18%	22.9%	5%	4%	6%	11.8%	11%	10.2%	13%	13.4%
<b>Total retail floorspace (sq.m.)</b>												
No. of outlets	61	58	33	35	21	25	18	17	75	59	208	194
<b>Floor space (sq.m.)</b>	<b>3,572</b> (without services)	<b>5,220</b>	<b>1,252</b> (without services)	10,116	<b>473</b> (without services)	1,279	<b>1,092</b> (without services)	<b>1,705</b>	<b>4,540</b> (without services)	<b>6,241</b>	<b>10,930</b> (without services)	<b>24,561</b>

The retail study, undertaken by consultants Roger Tym and Partners, found that most South and West Sligo residents do their supermarket shopping in centres such as Ballina, Carrick-on-Shannon and Boyle, while the majority of those living in the wider Gateway area and North Leitrim use facilities in Sligo City.

The Retail Strategy notes that large parts of County Sligo lack ready access to supermarket facilities and suggest that the development of “intermediate convenience facilities” (i.e. outside Sligo City) may be appropriate, in order to encourage a more sustainable pattern of convenience goods shopping while also reducing related expenditure leakage from the County (refer to Section 5 of the Joint Sligo City and County Retail Planning Strategy 2010-2017 for details on market shares and expenditure).

Additional floor space requirements are estimated at 1,220 sq.m. by 2015, rising to 4,470 sq.m. by 2020 (refer to Tables 5-10 and 5-11 on pages 45 and 46 of the Sligo City and County Joint Retail Strategy). In both instances, there would be scope for higher levels of floor space should discount retailers enter the market.

During the period 2011 to 2017, the floor space requirement is equivalent to a small supermarket, possibly to be provided in the Key Support Town of Ballymote, which has only one such facility.

The Retail Strategy outlines that a substantial part of the future floor space requirements has already been granted planning permission. In this context, it is necessary to monitor carefully the implementation of permitted development, to ensure that the County can provide an appropriate scale and quality of retail floor space, commensurate with its future population and the strategic role of its towns.

### 4.3.3 Location of future retail development

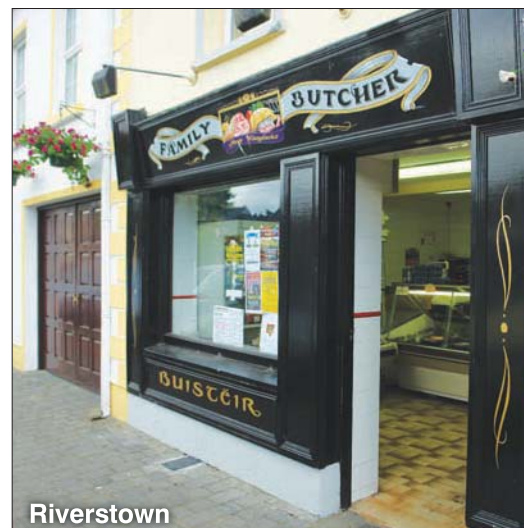
It is anticipated that, within the lifetime of this Plan, most new retail floor space will be provided in Sligo City and Environs.

Prospects of growth in the smaller towns of the County are limited and the thrust of development plan policy is to maintain and enhance the existing retail environment to serve and benefit local communities.

In this respect, outlets of particular importance include general food stores, newsagents, post offices and pharmacies, in addition to pubs, restaurants and cafés. The convenient location of these facilities, within the heart of towns and villages, contributes to sustainable patterns of development in a number of ways:

- by enabling services to utilise existing infrastructure, therefore saving resources;
- by strengthening town and village centres and fostering community and social interaction;
- by reducing the need to make journeys by car, thereby decreasing congestion and creating a safer environment.

Rural County Sligo could also look to tourism as another source of potential retail income. To enable the County to better exploit its tourism potential, the County Council will encourage the provision of facilities such as craft outlets and shops specialising in outdoor pursuits like angling and water sports.



## Retail planning policies

It is the policy of Sligo County Council to:

- P-RP-1** Support and encourage the key role of retailing within the towns and villages of County Sligo, particularly for daily convenience shopping, e.g. foodstuffs.
- P-RP-2** Facilitate small-scale retail development in villages, provided that:
- there is no significant adverse impact on the vitality and viability of established centres of Tobercurry, Ballymote, Enniscrone, Grange and Collooney, and
  - the proposals are of appropriate scale and are acceptable in terms of design, impact on residential amenity, servicing and parking arrangements.
- P-RP-3** Encourage the retention of retail/service outlets (e.g. general food stores, news-agents, post offices, pharmacies, pubs, restaurants and cafés) within town and village centres, with the exception of commercial operations that are no longer viable or are more appropriately located elsewhere (e.g. petrol filling stations).
- P-RP-4** Encourage uses that support local retail and service outlets, such as tourism-related ventures, hotels, craft shops and shops specialising in outdoor pursuits and water sports.
- P-RP-5** Ensure that retail and service outlets are located within the central area of a town or village, where they can best serve the population of the surrounding area.
- P-RP-6** Discourage inappropriate out-of-town shopping facilities that detract from the vitality, viability and/or character of existing town and village centres.
- P-RP-7** Generally discourage any retail outlet in excess of 500 square metres net retail floor space, including extensions that would enlarge an existing development over this threshold. Development over this size is clearly intended to serve more than a local catchment and would therefore be more suitably located in Sligo City and Environs.
- P-RP-8** Acknowledge the fact that many retail cores have an interspersed residential element. Give favourable treatment to proposed changes of use to retail, where the dwelling has adjacent retail uses on both sides, as this helps to create compact and sustainable retail cores.
- P-RP-9** Facilitate the reuse of existing vacant retail outlets in towns and villages.
- P-RP-10** Promote initiatives or programmes to enhance the character and urban design quality of Tobercurry, Ballymote, Enniscrone, Collooney and Grange, to ensure that they remain attractive for investment in commerce and retailing.
- P-RP-11** Ensure that all new retail and commercial development proposals respect the scale and character of the streetscape within which they are proposed.
- P-RP-12** Encourage the retention of traditional shop fronts and pub fronts of character and good design quality.

## Retail planning objectives

It is an objective of Sligo County Council to:

- O-RP-1** Facilitate the provision of an additional supermarket in Ballymote.
- O-RP-2** Restrict the further development of retail warehousing in Collooney and Grange and encourage the conversion of vacant units to appropriate uses, in accordance with the respective zoning objectives.

## 4.4 Tourism development



### 4.4.1 Existing resources

With the growth in affluence, mobility and leisure time, tourism is one of the major growth areas of the national economy. County Sligo, with its wealth of beautiful scenery, still remains largely unspoiled and relatively undiscovered. The County's cultural heritage and landscape, its accessibility by road, rail and air, and the range of activities available augur well for the continued expansion of this sector.

The natural scenery of Sligo is amongst the finest and most spectacular in the country. It is the County's primary tourist attraction. The mountains, forests, woodlands, lakes, rivers, coastline, offshore islands and largely unspoiled rural landscape offer the widest range of natural amenity and recreational pursuits. The protection of this unique natural environment, which could be jeopardised by development pressure – particularly unsympathetic, sporadic residential development, agricultural and forestry development and increased risk of pollution – is fundamental to the development of the tourist industry.

Benbulbin, the Dartry Mountains and the Ox Mountains provide the most spectacular scenery in County Sligo and have major potential for activities such as touring, sightseeing, mountaineering, hill-walking and pony-trekking. In addition, some of the more spectacular mountains are areas of scientific and archaeological importance.

Forests occupy a significant portion of Sligo's land area. Mostly under State control, they have a major recreational value and are open to the public. Woodlands like Slish Wood, Union Wood, Lough Gill Forest, Ben Bulbin Forest, Collooney Forest and Lough Talt Forest have significant stands of deciduous trees. These woodlands are located in scenic areas. Specially organised forests walks can exploit their botanical, visual, and literary/archaeological interests in a sensitive and unobtrusive manner.

The lakes of Sligo give the County a special identity. Lough Gill and the Garavogue River, Lough Arrow, Lough Gara, Glencar Lake, Templehouse Lake, Lough Talt and Lough Easky are immediately recognised as part of the typical Sligo landscape. These lakes are a major resource for sailing, boating, fishing and lakeshore walks. They also have strong wildlife, literary, archaeological and historical significance, although infrastructural services need to be developed to fully exploit their potential in a sustainable manner.

The coastline of County Sligo is another substantial resource. The traditional resorts of Mullaghmore, Rosses Point, Strandhill and Enniscrone have long attracted many visitors. In addition, there are magnificent beaches at Dunmorán, Streedagh and Culleenamore. Many smaller beaches are dotted along the coast.

Throughout the years, coastal erosion has caused significant damage in some areas. The protection of existing infrastructure and the unspoilt beauty of the whole coastline is of major importance in ensuring that Sligo's recreational and tourism potential can be fully exploited.

The other great resource for tourism in Sligo is the County's cultural, literary, historical and archaeological heritage. Increased interest in heritage, both nationally and internationally, has resulted in it becoming a major resource. The protection of heritage assets and their contexts is extremely important.

The Council recognises the importance of the tourism industry to County Sligo and the potential that exists within the County for the industry to expand further. This can be especially meaningful in more peripheral rural areas, many of which are areas of scenic value.

### 4.4.2 Trends and assumptions for the future

With 156,000 overseas tourists who generated revenue of 39m euro in 2006, Sligo had just one-third of the visitors of neighbouring County Mayo and only one-tenth of the revenue of County Galway. There are strong indications that Sligo has not capitalised on its full tourism potential. The availability of high-quality accommodation is a prerequisite for attracting high-spending tourists to the region. Although a number of hotels have been built in recent years, County Sligo is still significantly lacking in guesthouse accommodation. Unless addressed, such deficits will continue to act as a constraint to the development of the local and regional tourism industry.

Sligo County Council supports the policies outlined in the *Blueprint for Tourism Development in the West* (Western Development Commission, 2000). The WDC has always recognised that rural tourism can play a key role in promoting sustainable development. Since setting up the Western Development Tourism Programme in 2001, the WDC has become involved in a range of projects, including the Green Box. Begun in 2002 as Ireland's first eco-tourism project, the Green Box is now becoming one of Ireland's major niche tourism initiatives. The project delivers an eco-tourism destination to visitors to the Green Box region (all of Leitrim and Fermanagh and parts of Donegal, Sligo and Cavan).

In line with the *Border Regional Planning Guidelines 2010*, it will be the aim of Sligo County Council to promote the development of major new tourist attractions, particularly with regard to untapped tourism potential.

The Council will also co-operate with neighbouring local authorities, cross-border bodies and other agencies to promote and establish sustainable tourism initiatives in less-developed tourist destinations, particularly marginalised rural areas. Although rural tourism remains a relatively small niche in the overall tourism context, local communities can benefit from the promotion of local assets and the development of specialist activities.

Examples of the tourism products that are emerging, or have scope for further development, include holidays breaks that focus on the music tradition, literature, literary associations, hill-walking, archaeology and geology, angling, surfing, equestrian holidays, thalassotherapy (e.g. seaweed baths) and golf.

Each of these activities can generate spin-offs and demand for additional services, including accommodation, restaurants and transport.

### Cultural tourism

County Sligo's character and culture are vital assets that help the county compete as a tourism destination and a location of choice.

Cultural tourism is set to grow and throughout the next decade Sligo must aim to unlock the tourism potential associated with its archaeology, landscape, literary and musical heritage and its festivals.

County Sligo is in a strong position to build on its unique cultural heritage, which is a key differentiator in developing the area as a cultural tourist destination.





## Tourism development policies

It is the policy of Sligo County Council to:

- P-TOU-1** Promote the development of tourism in a sustainable manner and encourage the provision of a comprehensive range of tourism facilities, subject to location, siting and design criteria, the protection of environmentally sensitive areas and other planning considerations.
- P-TOU-2** Protect and conserve those natural, built and cultural heritage features that form the basis of the County's tourism industry, including areas of important landscape, coastal scenery, areas of important wildlife interest, historic buildings and structures and the traditional form and general appearance of towns and villages.
- P-TOU-3** Promote the development of high-quality tourist accommodation, especially hotels and guesthouses, and ensure high standards of architectural and urban design in all new tourist accommodation and facilities
- P-TOU-4** Strictly control development that might be detrimental to scenic and heritage assets, in cSACs, SPAs, proposed NHAs, designated Sensitive Rural Landscapes and Visually Vulnerable Areas, and along designated Scenic Routes. The Council will use its other statutory procedures, particularly in relation to waste management, water and air pollution, to ensure that these natural amenities remain unpolluted and visually unspoilt.
- P-TOU-5** Provide signposting and improve roads, existing amenity and viewing areas, and provide for car parking, public facilities and access in scenic areas, subject to compliance with the requirements of the Habitats Directive.
- P-TOU-6** In recognising the special amenity value of mountains, moorlands and forests, valleys and lakes, it is the Council's policy to encourage use of these areas for activities such as touring, sightseeing, mountaineering, and hill-walking, subject to compliance with the requirements of the Habitats Directive. This will be done in co-operation with state agencies and other interested bodies and local community groups. In this regard, the Council will, within financial resources, improve access and create public rights of way.
- P-TOU-7** Promote walking, rambling and cycling as appropriate recreational and tourism activities within the Plan area.
- P-TOU-8** Explore the provision of sustainable medium- and long-distance walking routes, in co-operation with adjoining local authorities.
- P-TOU-9** Support and promote, with the co-operation of private landowners, public access to heritage sites and features of natural heritage, geological and archaeological interest, coastal areas, islands, mountains, rivers, lakes and other natural amenities, subject to compliance with the requirements of the Habitats Directive.
- P-TOU-10** Promote the development of eco-tourism and other leisure activities, in an effort to diversify the range of tourist experiences available in the County and extend the tourist season, subject to compliance with the requirements of the Habitats Directive.
- P-TOU-11** Promote the development of interpretative signs and information boards at important sites of archaeological and natural interest.
- P-TOU-12** Support the growth of cultural tourism in the County and its potential for niche tourism products by facilitating the development of cultural events, infrastructure and activities.



### Tourism development objectives

It is an objective of Sligo County Council to:

- O-TOU-1** Secure the establishment of a flagship visitor attraction in the County, subject to normal development control standards and compliance with the requirements of the Habitats Directive.
- O-TOU-2** Examine the feasibility of providing a walkway through Union Wood, subject to availability of resources and compliance with the requirements of the Habitats Directive.
- O-TOU-3** Seek to establish a bird-watching area at the Ballygilgan Nature Reserve (Carney), subject to appropriate environmental considerations.
- O-TOU-4** Develop a coherent network of attractive cultural hubs/clusters with good access and supporting tourism and cultural signage.

### Coastal zone tourism policies

It is the policy of Sligo County Council to:

- P-CZT-1** Ensure that future caravan, camping and parking facilities in coastal areas will not be visually intrusive or impact on sensitive coastal environments (e.g. sand dune systems), by requiring, inter alia, appropriate siting, layout, design and natural screening, and compliance with the requirements of the Habitats Directive.
- P-CZT-2** Ensure continued compliance with EU Directives on water quality for all bathing beaches.
- P-CZT-3** Promote awareness of the sensitivity of the coastal environment, amongst visitors and residents alike, through the provision of educational/heritage appreciation programmes, public information boards and other appropriate means.
- P-CZT-4** Maintain and develop small piers and harbours along the Sligo Coast, subject to funding and compliance with the requirements of the Habitats Directive.
- P-CZT-5** Give priority to coastal areas within County-wide programmes to signpost and improve public rights of way.

### Coastal zone tourism objectives

It is an objective of Sligo County Council to:

- O-CZT-1** Manage and control car parking and vehicular and pedestrian movements on beaches and within dunes and other vulnerable areas. The management and control of car parking shall be carried out in compliance with the Habitats Directive where relevant.
- O-CZT-2** Develop green parking areas in appropriate coastal locations, i.e. soft areas that can be left in their natural state during out-of-season months and used to provide overflow facilities during peak periods. The development of such car parking areas shall be subject to compliance with the requirements of the Habitats Directive.
- O-CZT-3** Exclude land-based and marine-based motor sports activities from beaches.
- O-CZT-4** Provide a number of designated facilities and access points for controlled water-sports activities, in a manner that avoids conflict with nature conservation and activities such as swimming, sailing, fishing and mariculture.
- O-CZT-5** Liaise with the National Trails Advisory Committee to investigate the possibility of providing a coastal path along the coastline of County Sligo, with a right-of-way status, and liaise with counties Mayo, Leitrim and Donegal to set up a study group to advance this matter. The study group should be established within one year from the adoption of this Plan. Development of a coastal path shall be subject to compliance with the requirements of the Habitats Directive.
- O-CZT-6** Identify existing and potential coastal walking routes which can be developed as a tourism product and a local amenity. These routes will ideally be permanent, of high quality and adequately managed, should allow for further expansion and provide links to other activities and facilities.