

South Dublin County Council Economic Strategy

OCO Global Project Overview

May 2025



An aerial photograph of an industrial park. In the foreground, there's a green golf course with several trees. A river flows through the middle ground, bordered by lush greenery and some industrial buildings. In the background, there are large industrial complexes with white roofs, and further back, rolling hills under a blue sky with scattered clouds.

Agenda

01

Introductions

02

Project Overview

03

Activity to Date

Our Team



Mark O'Connell
Project Director
Economic Development Expert



Roslyn Neill
Project Manager – Day to day point of contact
Economic Development - Sector Analysis



Aoife Gannon
Senior Consultant – Economic and Enterprise
Development



Peter Swann
Senior Manager – Economic Development



Judith O'Doherty
Place Branding Expert



David L'Estrange
Environmental Assessment Expert



Dr Colm Reilly
Irish Economic Development Expert
GIS and mapping expert



John McIlroy
Sustainability and Environment Expert

OCO Global supports our clients to realise international growth opportunities

We work with businesses and governments to realise economic development opportunities, focused on international growth and strengthened competitiveness.

We are specialists in economic development with a keen focus on internationalisation, providing end-to-end solutions from tailored strategic advisory to investment attraction and export acceleration.

130+

Staff

Trade and investment professionals worldwide

10

Offices

Presence in the largest global trade and FDI markets

20+

Years

Founded in Belfast in 2001

3,000+

Clients

Across 100 countries, most long-term retained

Local Economic Strategy Project References

	Assignment	Services
 Comhairle Contae Dhún na nGall Donegal County Council	<ul style="list-style-type: none"> Enterprise Development and Place Branding Strategy & Plan 	<ul style="list-style-type: none"> Place branding strategy and website design Enterprise development plan in collaboration with LEOs Stakeholder engagement
 Comhairle Chontae Uíbh Fhailí Offaly County Council	<ul style="list-style-type: none"> Offaly Economic Development Strategy & Action Plan 2024 – 2029 	<ul style="list-style-type: none"> Vision for economic development Assessment of sectoral strengths, infrastructure, economic opportunities, priority areas Smart specialisation and scalable project potential Integration of planning, liveability and tourism Development of budget and action plan
 Comhairle Cathrach Bhaile Átha Cliath Dublin City Council	<ul style="list-style-type: none"> Evolution of the Dublin place brand 	<ul style="list-style-type: none"> Brand development and creative concept development Development of place branding strategy Benchmarking Dublin on placemaking principles
 WIRRAL	<ul style="list-style-type: none"> Business and cluster growth strategy 	<ul style="list-style-type: none"> Identification of high potential FDI attraction clusters Analysis of infrastructure, housing and employment Recommendations and strategy development for clustering locations throughout region



Agenda

01

Introductions

02

Project Overview

03

Activity to Date

Situational Overview and Purpose

On the back of South Dublin County Council's development plan, the Council seeks to develop a comprehensive Economic Strategy to shape the county's economic future for the next 20 years.

Context

Ireland remains resilient, but faces global headwinds

- Challenges include Brexit, US protectionist policies, AI disruption, and rising costs.
- FDI inflows dropped by €50.3bn in 2023; exports remain strong in key sectors, but US policies impact this.
- A strategic shift is needed to sustain long-term growth and competitiveness.

A Strong Economic Hub in South Dublin

- A strong economic base with 7,000 businesses, 85,000+ jobs, and major employers (Amazon, Pfizer, Microsoft).
- Opportunity to position as a high-growth, innovation-driven hub.

Strategic Opportunity

- **Differentiate from other Dublin regions** (e.g. Fingal, Dun Laoghaire - Rathdown): create a distinct, bold identity.
- **Optimise high-value land** (considering logistics, data centres, media) and shift toward strategic, sustainable sectoral growth.
- **Take control of the future:** proactively define and own SDCC's economic ambition.

Key Growth Pillars

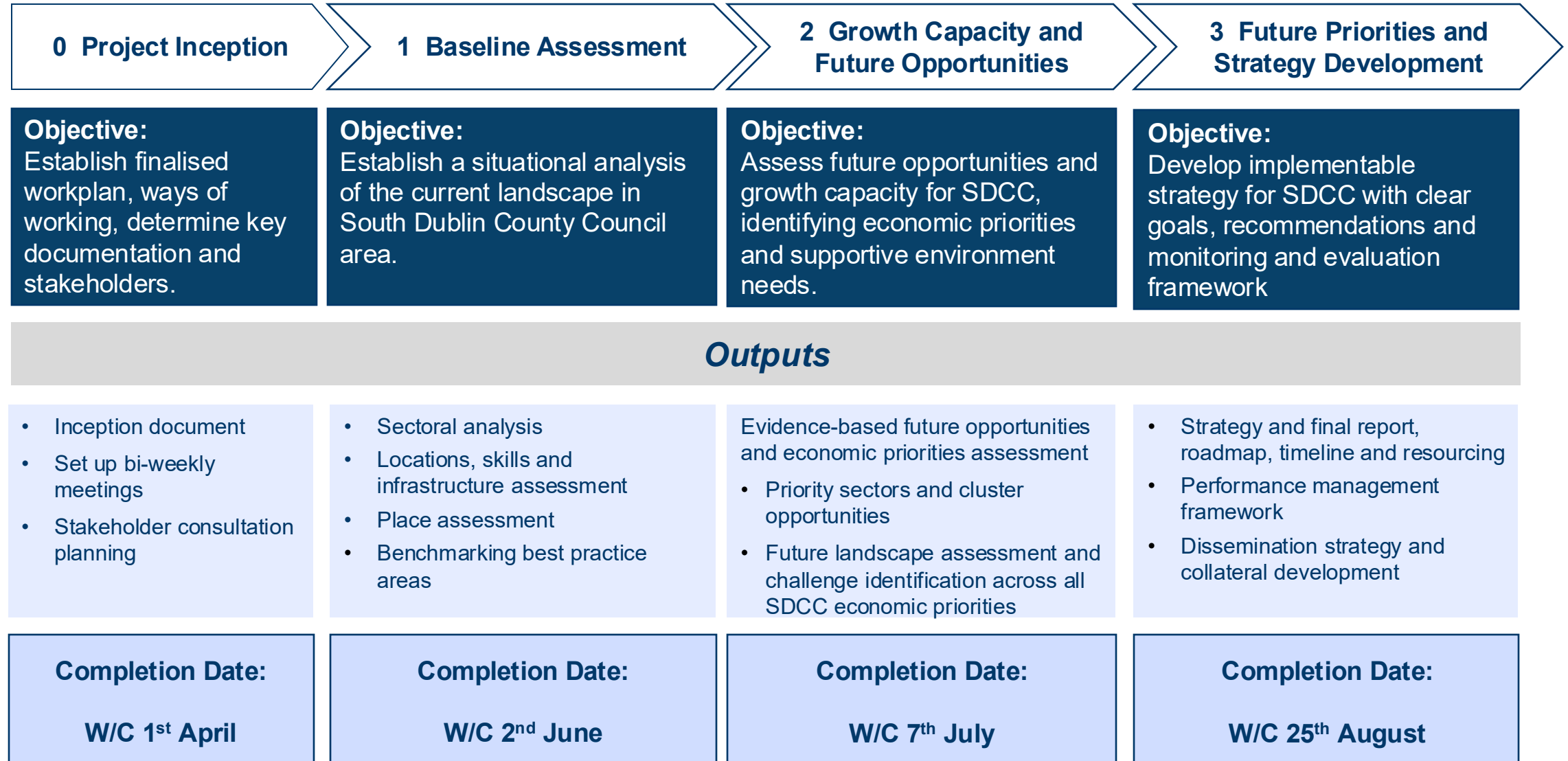
- **Sector Focus** - Target clusters: media, logistics, pharma, food, visitor economy. Develop indigenous & SME capacity around anchor firms and investments.
- **Place & Infrastructure:** €1.7bn investment planned; City Edge & Clonburris as transformational hubs. Prioritise high-density, high-impact development
- **People & Skills:** Align education pipeline (e.g. TU Dublin) with sector needs. Support inclusive job growth (1,500+ new jobs annually)
- **Positioning & Promotion:** Be world-class in 1–2 domains. Build visibility with events, international engagement (e.g. MIPIM). Leverage Dublin brand globally.

Actions

- Launch a bold, clearly articulated strategy
- Define SDCC's role as an economic leader
- Align stakeholders, partners and land use with strategic aims

Our Approach

OCO recommend a structured yet flexible programme of research strategy development through a 4-phased approach, outlined below



Baseline Assessment

Objective: Establish a situational analysis of the current landscape in South Dublin County Council area.

In-keeping with an economic strategy lens, the baseline assessment will begin with industry and sectoral analysis and determine all other areas of baseline analysis using an industrial sector lens.



Current State Analysis

- Industry and sectoral SWOT analysis
- Demographic and sociodemographic trends analysis
- Infrastructure assessment
- Current and future housing assessment



Regeneration and Land Use

- Capacity assessment of regeneration areas
- Impact of industry displacement
- Future land and employment uses
- Logistics and supply chain



Liveability Assessment

- Vista model report to produce aggregate score of place attractiveness
- Benchmark attractiveness scoring against regional comparators



International Benchmarking

- Review SDCC competitive advantages and positioning against regional and international comparators.
- Using OCO's economic competitiveness framework



Stakeholder Consultations

A key area of this phase will be stakeholder consultations – carried out in person.

- Validate the assessments carried out
- Gain insight into future plans and growth opportunities to feed into phase 2.

Outputs

- In depth review of SDCC's current position, sectoral split and supporting environment
- Benchmarking results against regional and international competitors
- Capacity assessment of regeneration areas
- Assessment of South Dublin as a place to invest, live, study and visit

Growth Capacity and Future Opportunities

Assess future opportunities and growth capacity for SDCC, identifying economic priorities and supportive environment needs.

Key Growth Sectors and Emerging Opportunities

Identify the sectors with highest economic growth potential

- Industry strengths modelling
- Global opportunity modelling
- Combined supply and demand model
- Annual monetary growth potential

Future Demographics and Skills Trends

- Trends assessment of 2011-2022 baseline assessment
- Compare with similar sized economies
- Map demographic trends and skills projections against priority industry needs

Sectoral Clusters and Infrastructure

- Regional and global cluster development best practice policies and infrastructure
- Identification of physical locations for cluster development alongside skills evidence

Environmental Assessment

Screening by certified ecologist firm to determine need for environmental assessments including:

- Strategic Environmental Assessment
- Appropriate Assessment

Illustrative combined supply and demand model

Pillar						
Indicator	FDI Overview	Known Opportunities	Economic Impact	Supply	Total Score	Rank
	40%	5%	15%	40%	100%	
Sector						
Business Services	4.79	4.00	2.89	5.00	4.55	1
Blue Economy	3.44	1.00	4.45	4.85	4.03	2
Agribusiness	3.12	2.00	3.52	4.80	3.80	3
ICT	5.00	3.00	5.00	2.00	3.70	4
Light Manufacturing	3.94	5.00	3.20	2.00	3.10	5
Tourism	3.16	1.00	3.13	2.90	2.94	6
Transportation & Logistics	3.62	1.00	3.28	2.15	2.85	7
Forestry & Wood Products	2.16	1.00	2.81	3.00	2.54	8
Chemicals	2.98	2.50	4.92	1.10	2.49	9
Life Sciences	3.12	3.00	2.81	1.05	2.24	10
Textiles	2.87	1.00	3.36	1.00	2.10	11

Indicative vista benchmark report – liveability factors

Results at a glance



*Benchmark score is an average score across all Irish Counties



Future Priorities and Strategy Development

Develop implementable strategy for SDCC with clear goals, recommendations and monitoring and evaluation framework, establish stakeholder buy-in for strategy, develop strategy dissemination plan and activities.



Economic Strategy

Vision and values for South Dublin County Council
Strategy Chapters:

- Priority sectors and high ROI economic activity
- Employment, liveability and placemaking
- Skills development
- International and domestic target markets

Each chapter will include:

- Evidence-based prioritisation recommendations; Key performance indicators; Constraints and challenges to address; Mitigation strategies for tackling challenges; Detailed roadmaps for implementation

Monitoring and evaluation framework

- KPIs, monitoring and reporting mechanisms with chain of command recommendations.



Stakeholder Workshop

Host a stakeholder alignment workshop following development of draft strategy.

- Ensure alignment with key stakeholder priorities
- Ensure stakeholder buy-in and support for strategy
- Add any additional stakeholder feedback to strategy final draft



Dissemination Strategy

- Clear stakeholder communication plan and dissemination strategy to launch economic strategy across the region
- Collateral development: webinar and brochure material
- Launch event

Outputs

- Full draft strategy and final report providing a roadmap, timeline and resource input for implementation
- Performance management framework
- Dissemination strategy and collateral development
- Dissemination activities

An aerial photograph of an industrial park. In the foreground, there's a green golf course with several trees. A river flows through the middle ground, bordered by lush greenery and some industrial buildings. In the background, there are large industrial complexes with white roofs, and further back, rolling hills under a blue sky with scattered clouds.

Agenda

01

Introductions

02

Project Overview

03

Activity to Date

Activity to Date

OCO GLOBAL



National Level Sector Impact Assessment

Data assessed on GVA impact and growth, SDCC employment levels, average salaries, R&D&I impact, Capital investment, Categorisation of sectors by proposed intervention strategy



South Dublin Place Attractiveness Assessment

Eutopia proprietary analysis of South Dublin's competitiveness as a place to live, invest, study and visit
Initial recommendations on increasing South Dublin attractiveness



Local Data and Qualitative Analysis

Data collection and literature review ongoing on employment, demographic trends, housing, infrastructure, liveability and sector impact. For combination with stakeholder consultation data and insight.



Stakeholder Consultations

20 consultations arranged to date taking place 8-23rd May. Mix of business parks, enterprise support organisations, national bodies, industry associations, skills and education, community organisations and sector operators.

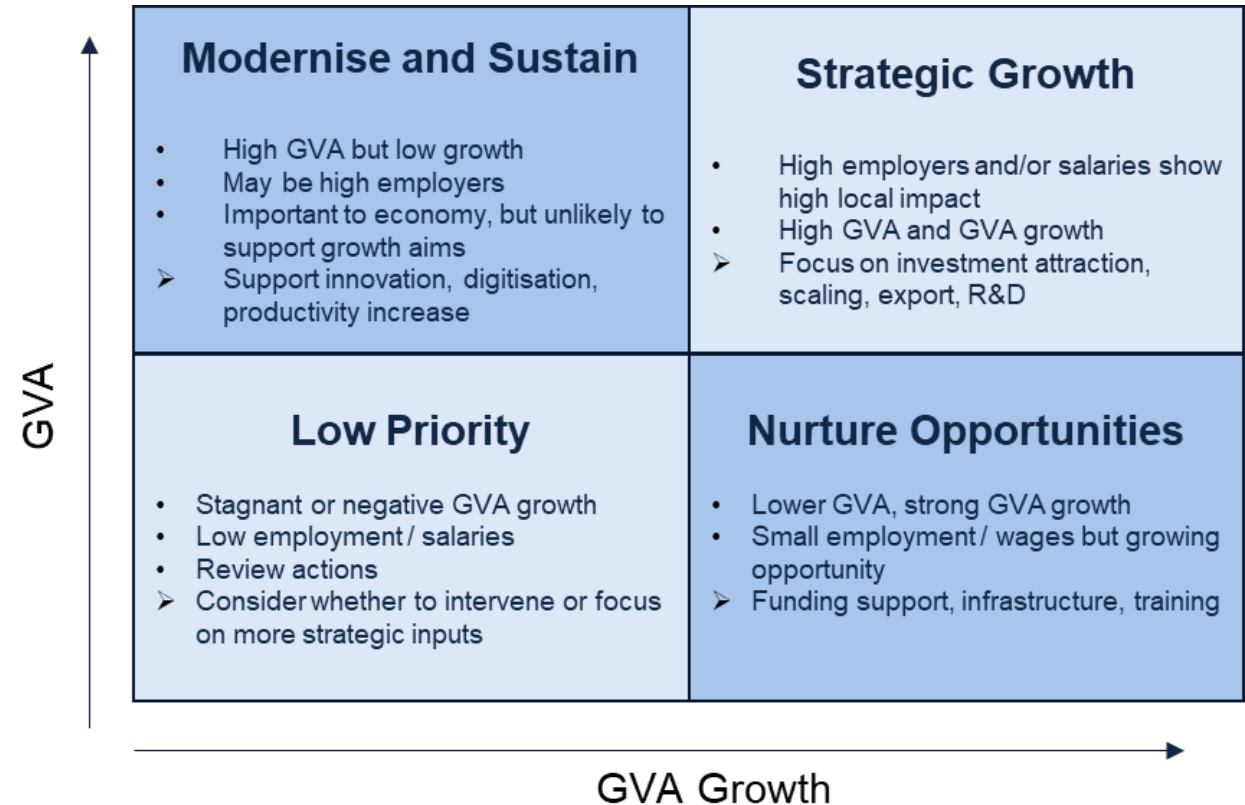
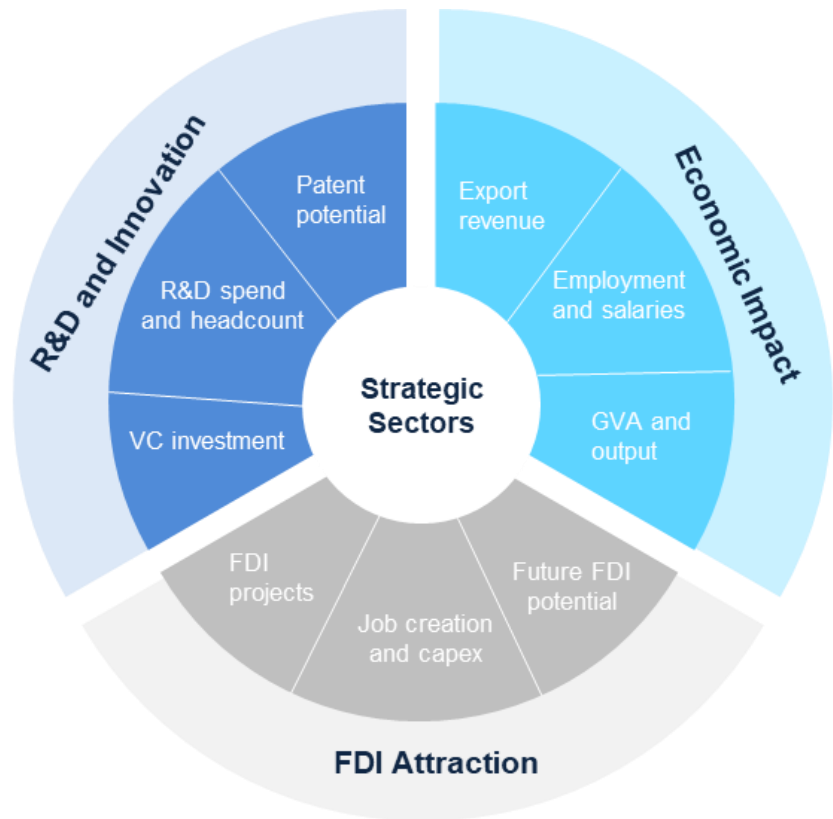


International Benchmarking Assessment

Identified 8 benchmarking locations with expertise and success in key opportunity sectors for South Dublin – policy review, success stories and case studies with recommendations being developed

Initial Indicative Assessments

Assessing national and regional data on GVA and GVA growth, Research, Development and Innovation potential, FDI attraction and job creation, Export potential, Capital investment and Enterprise growth, we have identified the below four categories for economic sector, which will inform the intervention strategies recommended to boost South Dublin County's growth and economic development.



Initial Indicative Outputs

Strategic Sector Analysis – Impact assessment of GVA, employment, salaries and GVA growth

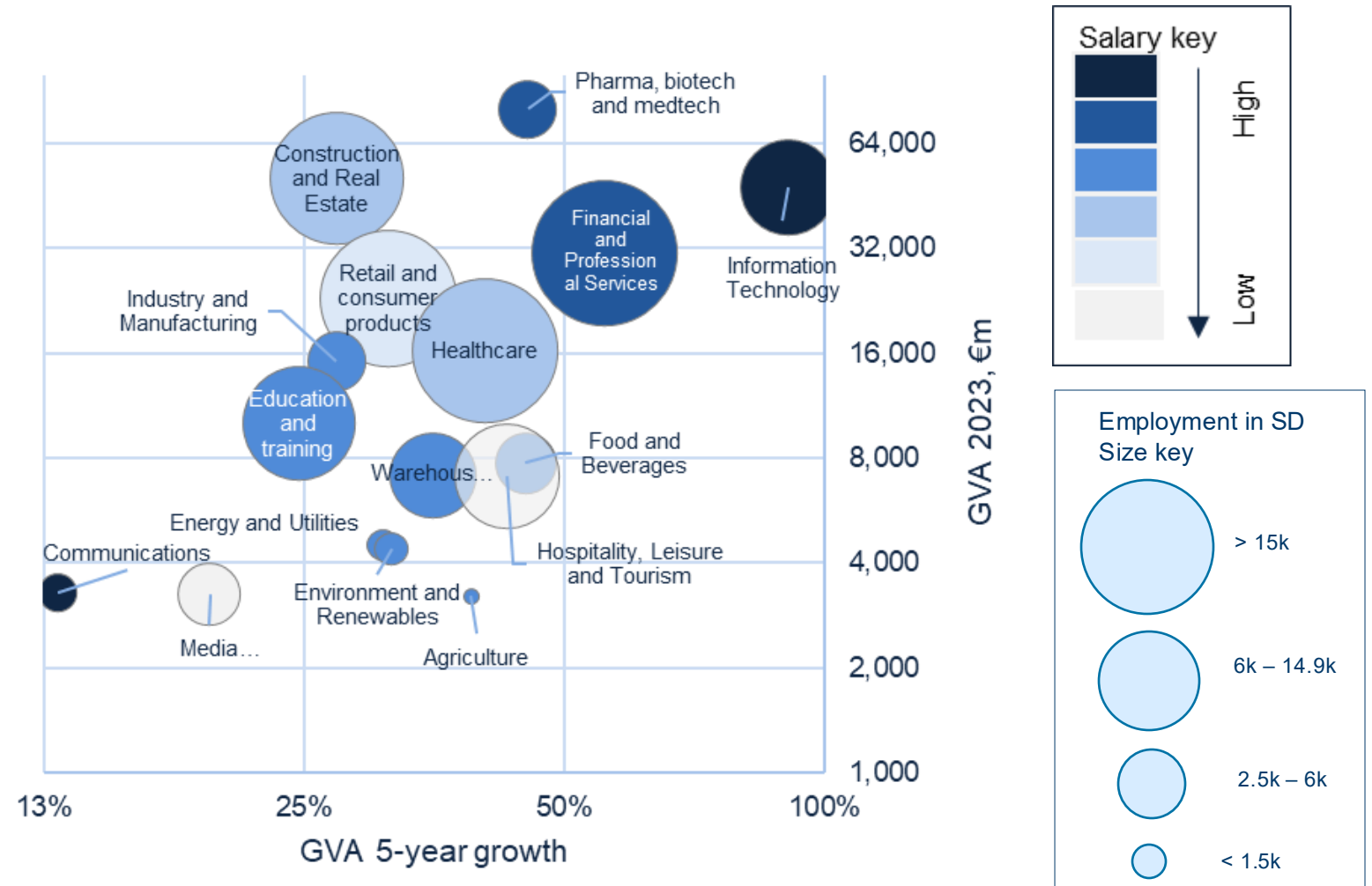
The graph opposite looks at economic impact of key active sectors in South Dublin.

This matrix provides a comparative overview of 17 key sectors in South Dublin.

Sectors in the top-right quadrant are both large and fast-growing, indicative of high-value strategic assets.

Bubble size depicts current employment in the sector in South Dublin, showing local job impact, while bubble colour intensity reflects average salary.

Information Technology and Pharma, biotech and medtech stand out as high-growth, high-value sectors, while Construction and Real Estate provides strong employment and GVA despite moderate growth. Sectors with low growth and small GVA (bottom-left) reflect a need for support/transformation – qualitative review will inform strategic intervention.



How does South Dublin compare as a location to Invest, Live, Visit and Study?



Benchmark scores

	Invest	Visit	Live	Study
Score	58	52	61	68



Key contacts



Mark O'Connell
Project Director
mark.oconnell@ocoglobal.com



Roslyn Neill
Project Manager
roslyn.neill@ocoglobal.com
 +44 28 9026 0413



OCOGlobal.com

