

South Dublin County Council Economic Strategy

Executive Summary

8th September 2025



Comhairle Contae
Átha Cliath Theas

South Dublin
County Council

OCO GLOBAL

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Purpose

To define a clear, differentiated economic value proposition and positioning for South Dublin

Economic Context



- Ireland faces new global pressures: Brexit, US protectionist policies, AI disruption, rising costs
- FDI flows dropped €50.3bn in 2023, exports remain strong
- Strategic shift required for long-term growth and competitiveness

Policy and Strategy Context

Project Ireland
2040

IDA Strategy
2025

SDCC County
Development
Plan

Dublin Regional
Enterprise Plan

Regional Spatial
and Economic
Strategy

Enterprise
Ireland 5-year
Strategy 2025

SDCC Local
Economic and
Community
Plan

Vision and Values

To develop an economic strategy for South Dublin which creates a thriving, future-ready and diverse economic base made for the people of South Dublin.

Strategy Chapters: Objectives



Sectors: Develop a distinct economic identity for South Dublin focused on its core strengths



Space: Optimise and innovate land use in South Dublin to provide strong and cohesive growth

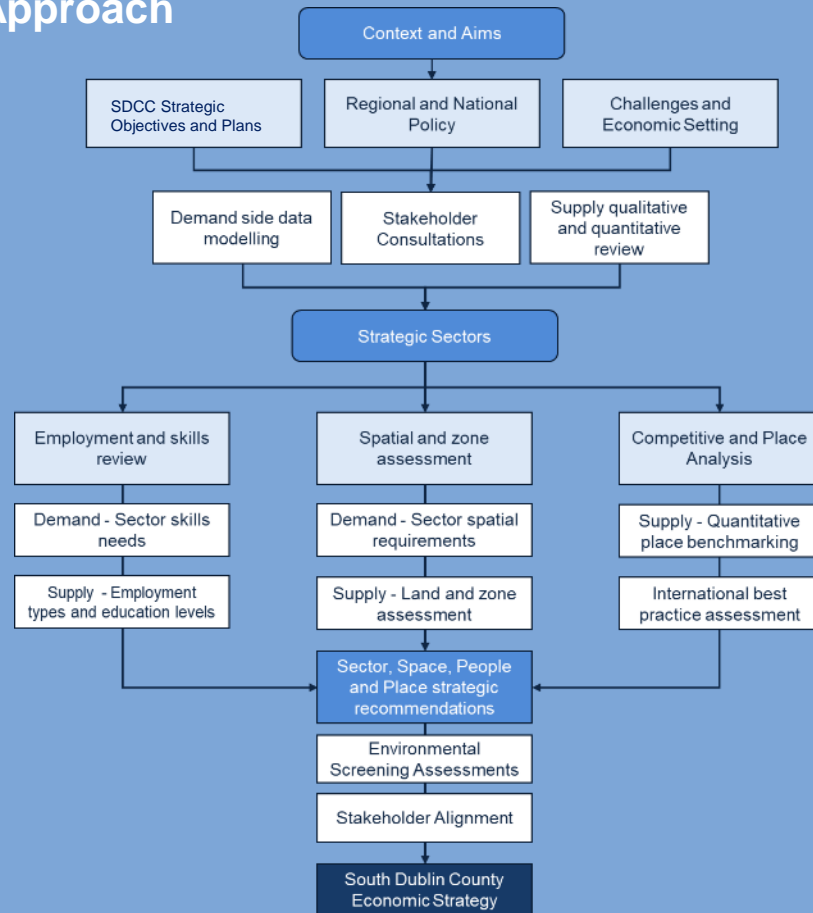


People: Ensure opportunity for all across South Dublin, and future-proof local skillsets



Place: Ensure South Dublin is a great location for people to live, work, study and visit, with a strong sense of place.

Evidence-Based Approach



South Dublin Sector Economic Snapshot

€**22.23**bn

South Dublin job-based GVA 2022

Dublin City
€46.39bn

Fingal
€25.0bn

DLR
€19.55bn



Sector Facility Spotlights

Work IQ - Digital Services / Technology

Tallaght University Hospital - Healthcare

The Square + Liffey Valley – Retail



6,418 active enterprises

Top company sectors

Retail and wholesale	18%
Industry / manufacturing	14%
Financial and professional	11%
Healthcare	9%
Hospitality, leisure, tourism	9%

Top employment sectors

Financial and professional	17%
Retail and wholesale	12%
Healthcare	11%
Education and Training	8%
Construction	8%

Top 5 Sectoral GVA Contribution

According to GVA by sector x jobs in South Dublin

Industry and Manufacturing	€7bn
Digital Services	€4.2bn
Financial and professional	€2.89bn
Retail and Wholesale:	€1.56bn
Pharma, biotech, medtech	€1.45bn

Sectors

Objective:

To facilitate and grow a diverse economic base in South Dublin, which builds on local sectoral strengths, develops a unique economic identity for South Dublin, and ensures a strong economic ecosystem to create resilience and opportunity for all sectors.

Overarching Themes

- Empowering Enterprise
- Fostering Innovation
- Sustainable Futures
- Investing in Infrastructure

Three categories of priority sector recommended based on their role in developing South Dublin's economy

Identity Drivers

Nurture and grow

Differentiators. Showing strong economic impact and local differentiation. Strong identity builders for South Dublin

Creative and
Media

Food and Drink

Tech for People
and Place

Growth Engines

Develop and empower

Tried and tested growth engines. High national and global economic impact with successful track record in South Dublin.

Pharma, Biotech,
Medtech

Industry and
Manufacturing

Retail and Wholesale

Digital Services

Ecosystem Enablers

Monitor and support

Essential foundation of South Dublin's economy - supporting a dynamic, future-ready business environment.

Hospitality, leisure and
tourism

Financial and
professional

Logistics and
Warehousing

Environment and
Renewables

Construction

South Dublin Space Snapshot

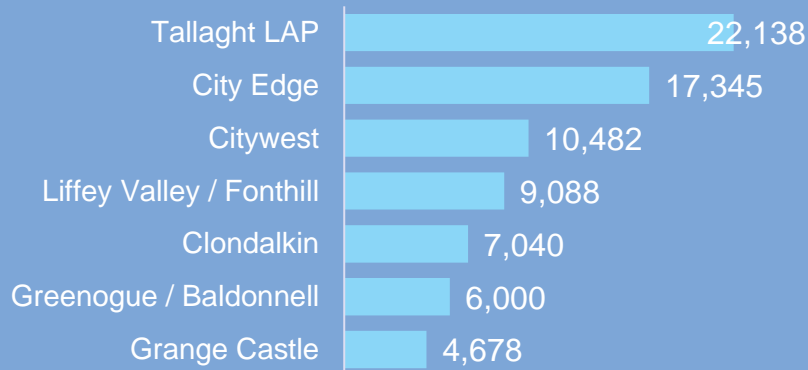
Available Employment Land

Employment lands zoned CDP: 625 ha
Undeveloped EE space: 352.77 ha

Areas with largest undeveloped land available (2024):

- Grange Castle West: 161.6 ha
- Grange Castle South: 104.18 ha
- Baldonnell: 18.41 ha
- Greenogue and Aerodrome: 18.4 ha
- Grange Castle East: 17.56 ha

Employment Distribution



Transport Modes to SD Employment Areas



81.1%



9.4%



5.8%

Key Employment and Regeneration Areas

- Tallaght LAP
- City Edge Regeneration
- Grange Castle Masterplan

Objective:

Overarching Themes

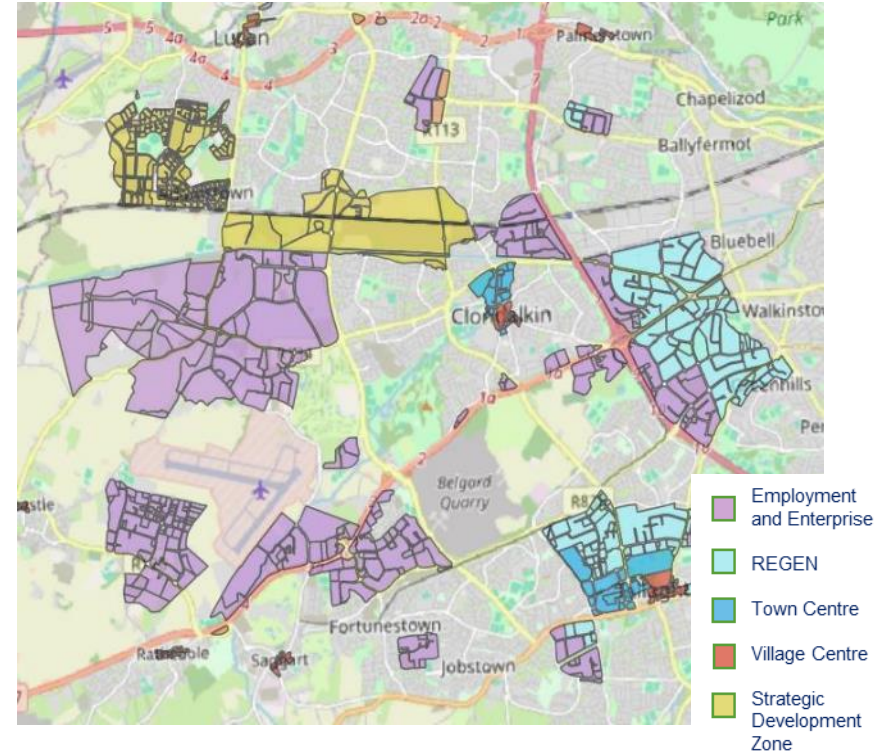
- Empowering Enterprise
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South Dublin has a successful and diverse economic base across the county. Sectors are growing, and South Dublin has the opportunity to target priority sectors through a consistent spatial strategy.

Promote suitability of strategic areas for specific sectors and activities

Targeted, specific cluster development in Grange Castle and Tallaght

Explore feasibility for designation of strategic areas for heavier industry and logistics



South Dublin People Snapshot

Key Stats

Population

Population 2022	301,075
Change 2016-2022	+8%

Employment

Residents employed 2022	57.8%
Change 2016-2022	+2.3%

Unemployment

Unemployment 2022	5.5%
Change 2016-2022	-3%

Educational Attainment

	Up to lower secondary	Upper secondary – Adv. Cert.	Higher cert – PhD
2022	22.7%	32.4%	38.7%
2016	26.3%	34.4%	32.6%

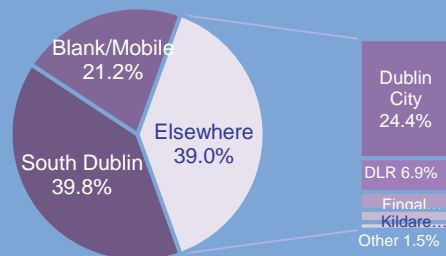
Source: POWSCAR, CSO

Occupation Types

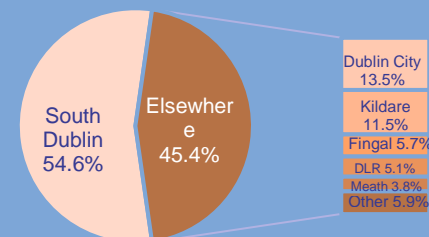


Commuting Levels

Where South Dublin's residents are employed



Where South Dublin's workforce lives



People

Objective:

To provide opportunity for all across South Dublin ensuring the diverse fabric of South Dublin's community is catered for, jobs and employment are created and accessible, and South Dublin's talent pool are provided with the skills and tools to succeed.

Overarching Themes

- Empowering Enterprise
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South Dublin's resident base presents a high diversity in qualifications and occupational profiles, aligning well with the diversity of industries in the local economy.

Several studies and strategies have been developed which target policies and interventions to support the people of South Dublin including the County Development Plan and the Local Economic and Community Plan.

This section of the economic strategy aims to support South Dublin in the creation of economic opportunity for all:

1. Pathways to access upskilling
2. Access to employment in the county
3. Employment across skill levels

Key Recommendations

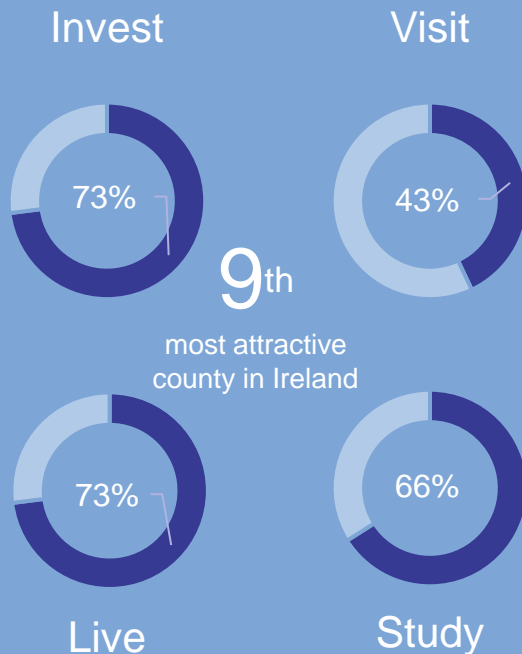
Develop skills strategy to map skills needs and support learning pathways

Support job creation across sectors and skill levels

Ensure population areas have access to employment and opportunities

South Dublin Place Snapshot

South Dublin attractiveness as a location to invest, live, study and visit



Invest

Ranks 4th

Top indicators

Population, ABC class, GVA, Economic activity, broadband

Focus Improvements

Total Big 4
% self-employed

Visit

Ranks 25th

Top indicators

Distance to large Airport
Direct destinations from airport

Focus Improvements

Number of attractions
Domestic trips
Domestic spend

Live

Ranks 5th

Top indicators

Ethnicities
Distance to A+E
% Good health
WFH population
Childcare services

Focus Improvements

No. remote hubs
Average rent

Study

Ranks 18th

Top indicators

University ranking
% finished upper secondary/technical

Focus Improvements

Student population
Progression to 3rd level

Place

Objective:

To ensure South Dublin is a place for people to live, work, study and visit, and economic growth is centred around creating a strong sense of place.

Overarching Themes

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From Tallaght to Templeogue: South Dublin has diverse and distinct districts across the county with unique characteristics, priorities and identities. Place based actions focus on purposeful planning, targeted intervention and vibrant branding to help South Dublin thrive.

Infrastructure development:

Purposeful investment in infrastructure, housing, and tourism to support and unlock long-term growth and resilience

Inclusive placemaking:

Shape vibrant, people-centred environments that foster community, culture, and quality of life.

Develop new narrative:

Promote South Dublin communities with a strong, authentic proposition to attract talent, visitors, and investment

Work in partnership:

Coordinate South Dublin stakeholders and resources to ensure communities are maintained, animated, and continuously improved.



4 Ps

Place
Development

Place
Making

Place
Branding

Place
Management

Next Steps

- Final inputs from SPC
- Sign off from SDCC
- Publishing of strategy
- Launch event
- Implementation



Key contacts



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