A new Economic Strategy is timely...

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- Geo-political Issues

- Rising Costs and Inflation

- AI disruption

- Reduction in FDI since 2023

- Last Economic Strategy prepared in 2012

- New policy context

Responding to AI and Technological Disruption

Why this matters

- Rapid advances in AI and automation are changing how work is done
- Productivity gains and job displacement risks are uneven across sectors
- Skills adaptability is now a core economic competitiveness issue

How the Strategy Responds (Snapshot)

- Prioritises high-value, knowledge-intensive sectors best positioned to benefit from AI
- Supports innovation, R&D and technology adoption, not just start-ups
- Develops a County Skills Strategy focused on reskilling, upskilling and lifelong learning
- Strengthens clusters and places that support collaboration and innovation

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Delivering the LECP: The Economic Strategy

The **Local Economic and Community Plan (LECP)** sets the long-term vision and objectives for economic and community development in South Dublin.

The **Economic Strategy translates the economic elements of the LECP into a focused, evidence-led delivery framework.**

It provides:

- Deeper economic analysis
- Clear priorities and sequencing
- Tangible, time-bound actions

Together, the LECP and Economic Strategy form a **coherent framework from policy to delivery**

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South Dublin
Local Economic and Community Plan
2024-2030

December 2024

Economic Strategy 2026
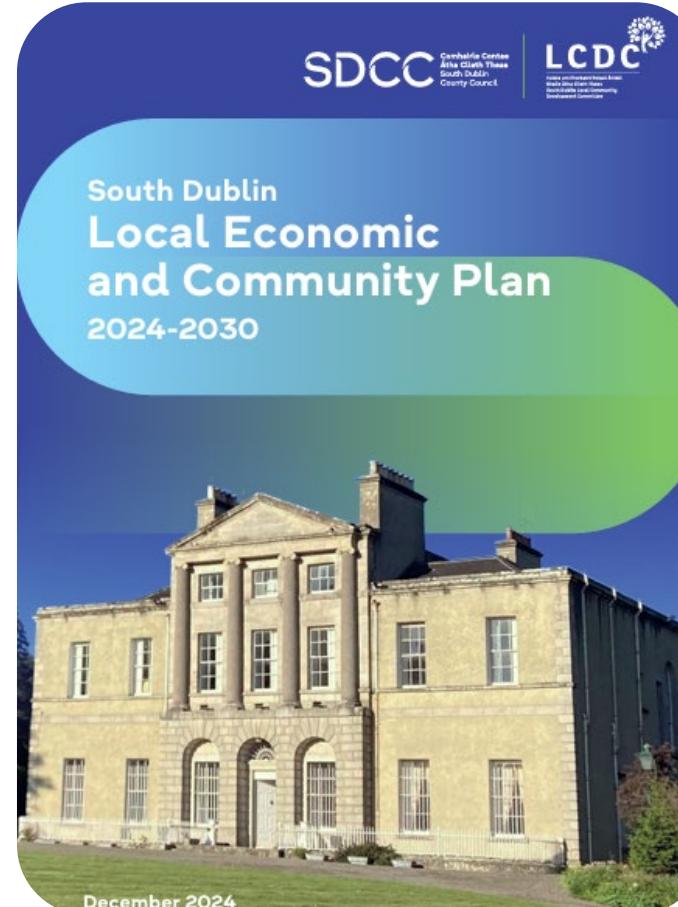
Our strategy centers around 4 key pillars

Ambitions and Actions

KPIs, Monitoring and Evaluation
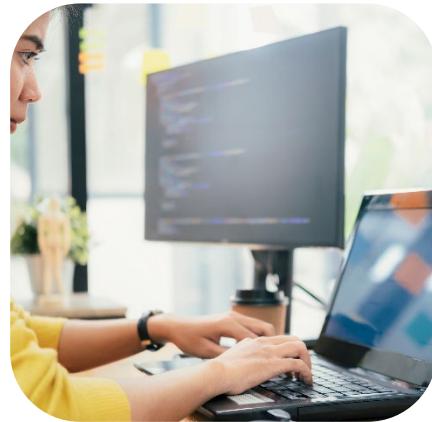
Sectors

Analysed the composition of our business and industry base to model how they will evolve and grow.

Space

Analysed what land we have for employment uses and how to optimize these lands, including opportunities for clustering sectors.

People

Assessed the diverse employment and skills base to future proof opportunity for the people of South Dublin.

Place

Assessed why South Dublin is an attractive place for people to live, work, study and to visit.

Increasing Gross Value Added (GVA)

The challenge

• South Dublin generates €22.6bn in GVA (2022)

• Productivity growth under pressure from rising costs and global volatility

Our response

• Target 15–25% GVA growth by 2030 (€22.6bn–€28.3bn)

• Focus on high-value sectors, innovation and skills-led growth

Pillar 1: Sectors - snapshot

€22.61bn
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
Grange Castle Business Park – Pharma / FDI

6,418 active enterprises

Top 5 company sectors

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

Top 5 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 – Nuture, Empower, Support

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

Key recommendations and actions to support:

- Sector identity drivers
- Sector growth engines
- Sector ecosystem enablers

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

Supporting High-Value Sector Growth

Strategy actions (Pillar 1: Sectors)

o *"Develop clusters for growth sectors through designation of areas and encouraging co-location of businesses within similar industries to enhance and fuel innovation."* **(Action 1.2.3, Mid – 1–2 years)**

o *"Facilitate expansion of key innovation growth areas"* **(Action 1.2.13, Ongoing)**

o *"Support expansion of companies through FDI support, R&D expansion and enterprise growth across priority sectors to increase growth of entry-level, mid-level and professional roles."* **(Action 3.3.1, Ongoing)**

Growing Within Finite Space

The challenge

- Employment land is finite (c. 625 hectares zoned)
- Regeneration risks business displacement if unmanaged

Our response

- Optimise every hectare through clustering and intensification
- Actively manage relocation and employment land use

Infrastructure and Housing Delivery

The challenge

- Over 104,000 jobs with high levels of commuting
- Transport, utilities and housing not keeping pace with growth

Our response

- Deliver transport-led employment hubs
- Align growth with infrastructure and housing delivery

What Do We Mean by Transport-Led Employment Hubs?

The concept

- Employment locations planned around high-capacity public transport
- Transport is treated as an enabler of growth, not an afterthought
- Supports compact, accessible and sustainable employment development

What this looks like in South Dublin

- Concentrating employment growth in Tallaght, City Edge, Citywest and Grange Castle
- Aligning jobs with Luas, BusConnects, rail and active travel networks
- Supporting higher employment density, mixed use and supporting services
- Improving access to jobs while reducing car dependency

Pillar 2: 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

Area	Employment
Tallaght LAP	22,138
City Edge	17,345
Citywest	10,482
Liffey Valley / Fonthill	9,088
Clondalkin	7,040
Greenogue / Baldonnell	6,000
Grange Castle	4,678

Transport Modes to SD Employment Areas

69.9%   9.4%   5.8%

Key Employment and Regeneration Areas

- Tallaght LAP
- City Edge Regeneration
- Grange Castle Masterplan

Space – Regeneration, Development, Clustering

Objective

To optimise the available land and space within South Dublin to ensure employment lands are well used, prioritised for the best economic growth and prosperity outcomes, and future-proof forward planning to foster and grow South Dublin's economy.

Key recommendations and actions to support:

- Key employment and regeneration areas

- Capacity of these areas for future development

- Ecosystem that supports these areas

- Sectoral clusters
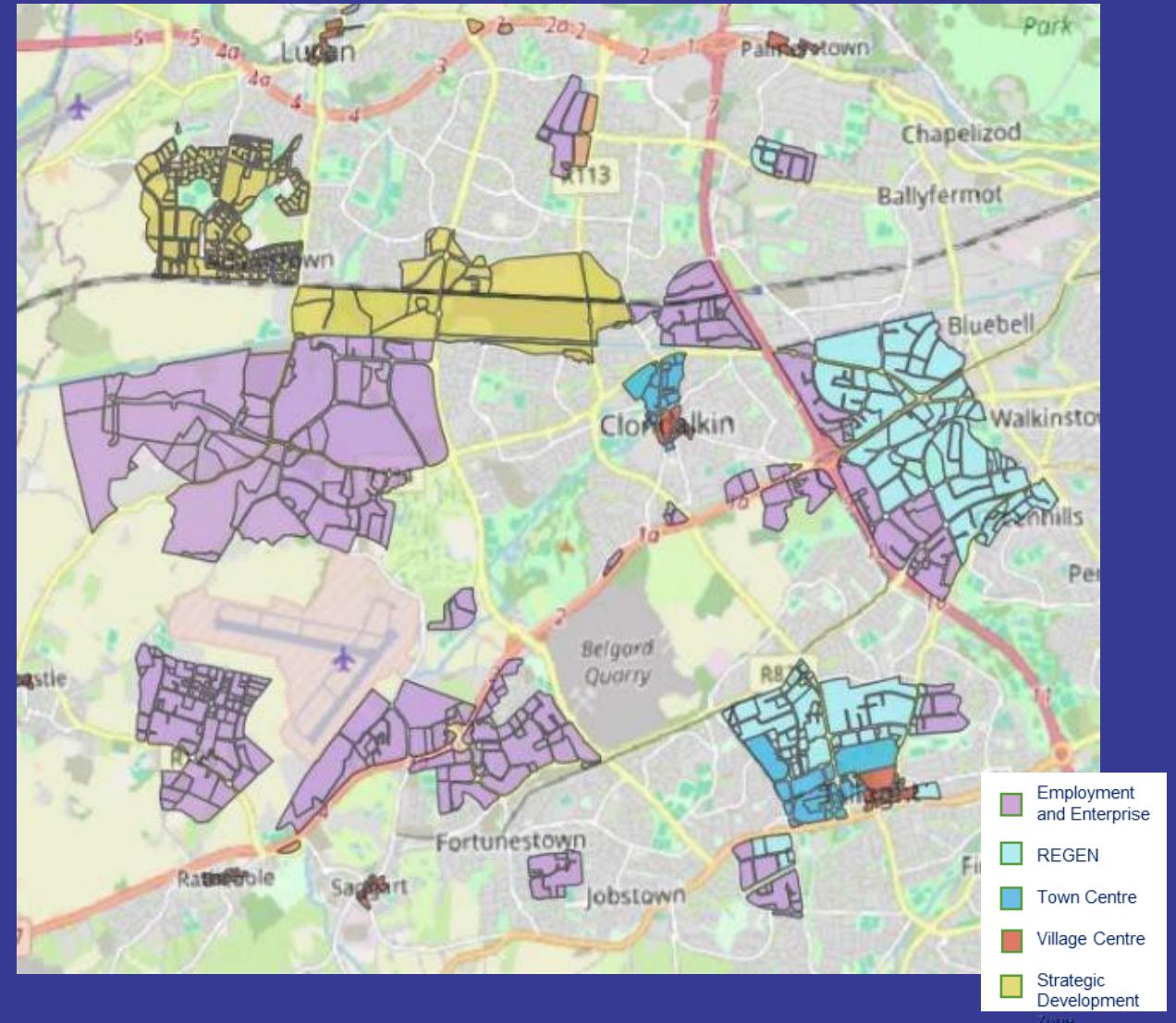
Optimising and Managing Employment Land

Strategy Actions (Pillar 2: Space)

o *"Support the optimisation of every hectare of employment lands in South Dublin so that space actively powers innovation, inclusion and prosperity."* **(Action 2.5.0, Ongoing)**

o *"Develop a Future Employment Land Framework – a strategic, data-led process that will identify, test and prioritise sites for future economic activity."* **(Action 2.5.1, Mid – 1–2 years)**

o *"Establish an Employment Land Monitor to carry out annual employment land audits to review land availability, development readiness, infrastructure alignment and sectoral trends."* **(Action 2.5.2, Mid – 1–2 years)**

# Skills Mismatch and Outward Commuting

The challenge

- Only 39.5% of residents work within the county
- Over 80% of outward commuters are in higher-value occupations

Our response

- Deliver a County Skills Strategy by end 2026
- Strengthen local employment hubs and progression pathways
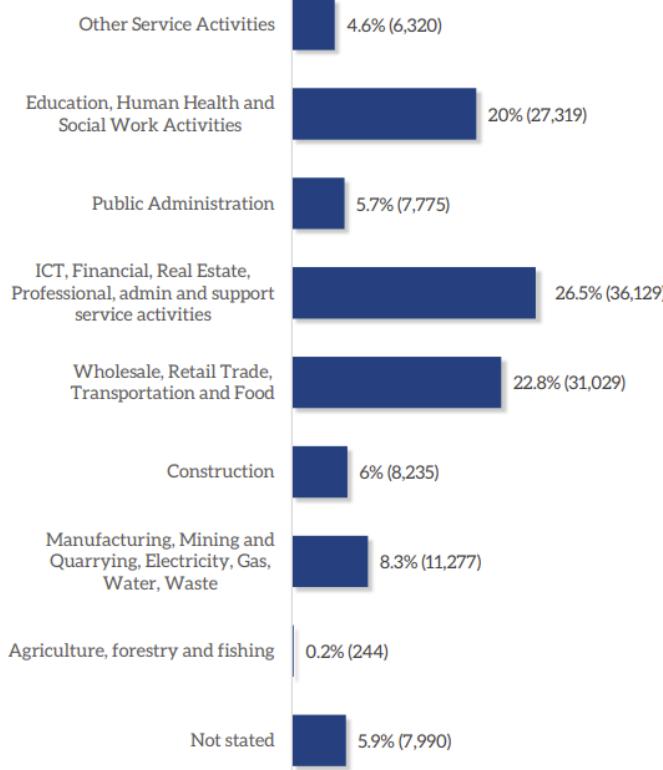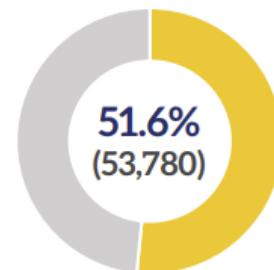
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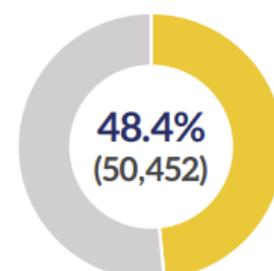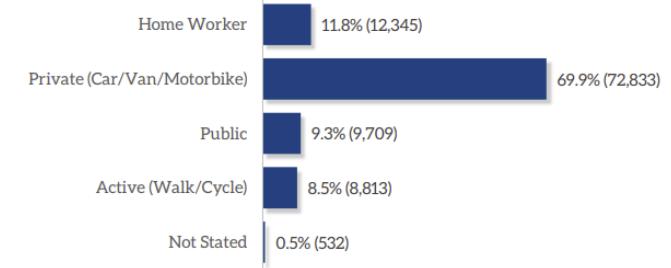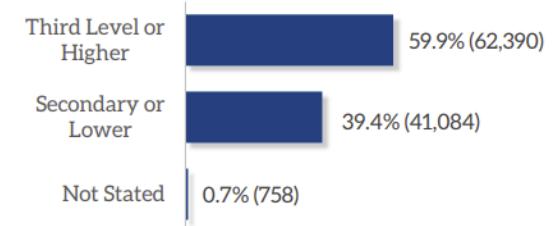
People – Opportunity for all

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.

Key ambitions and actions to support:

- Connected and accessible skills and lifelong learning

- Accessible to employment hubs

- Growing local talent and opportunity

Delivering Transport-Led Employment Hubs

Strategy actions (Pillar 2: Space & Pillar 3: People)

o *"Enhance and connect employment hubs to create flexible, well-serviced spaces linking talent, enterprise and opportunity across the county."* **(Action 3.2.0, Mid – 1–2 years)**

o *"Integrate sustainable transport solutions around key employment locations to improve accessibility, reduce emissions and strengthen labour market reach."* **(Action 3.2.2, Mid – 1–2 years)**

o *"Support the expansion of cycling infrastructure, pedestrian networks and public transit connectivity to main employment hubs, including Tallaght, Clondalkin, City Edge and Grange Castle."* **(Action 3.2.3, Long – 3–5 years)**

Delivering a County Skills Strategy

Strategy actions (Pillar 3: People)

o *"Develop a coordinated County Skills Strategy that aligns education, enterprise and community partners to meet evolving workforce needs."* **(Action 3.1.1, Mid – 1–2 years)**

o *"Expand lifelong learning and upskilling opportunities so residents can gain the capabilities needed to thrive in a changing economy."* **(Action 3.1.2, Mid – 1–2 years)**

o *"Promote clear progression pathways through collaboration with employers and education providers, supporting continuous career development."* **(Action 3.1.3, Long – 3–5 years)**

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Strengthening Place Competitiveness

The challenge

- Strong as a place to invest and live
- Weaker as a place to visit and study

Our response

- Invest in placemaking, town centres and the evening economy
- Strengthen South Dublin's identity and visibility

Pillar 4: Place - snapshot

Vista Report

9th most attractive County in Ireland

4th Invest

25th Visit

5th Live

18th Study

Top indicators Population, ABC class, GVA, Economic activity, broadband	**Focus Improvements** Total Big 4 % self-employed
Top indicators Distance to large Airport Direct destinations from airport	**Focus Improvements** Number of attractions Domestic trips Domestic spend
Top indicators Ethnicities Distance to A+E % Good health WFH population Childcare services	**Focus Improvements** No. remote hubs Average rent
Top indicators University ranking % finished upper secondary/ technical	**Focus Improvements** Student population Progression to 3rd level

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Place – Develop, Promote, Activate

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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.

Key recommendations and actions to support:

- Place Development

- Place Making

- Place Branding

- Place Management

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**

Placemaking, Place Management and Identity

Strategy actions

• *"Create a more welcoming, attractive and people-centred environment in key towns and villages by delivering high-impact placemaking interventions."* **(Action 4.1.0, Mid – 1–2 years)**

• *"Strengthen collaborative, cross-sector place management by establishing structures including Business Improvement Districts and co-created local action groups."* **(Action 4.1.6, Mid – 1–2 years)**

• *"Reposition South Dublin through a coordinated, insight-led place marketing and branding strategy that communicates its strengths and more effectively attracts visitors, students, talent and investment."* **(Action 4.2.1, Mid – 1–2 years)**

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Comhairle Contae
Átha Cliath Theas

South Dublin
County Council

Thank you

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