

# Economic Strategy 2026 - 2030



This Strategy is situated alongside the hierarchy of statutory documents that is subject to environmental assessment/screening for environmental assessment, as appropriate, and that forms the decision-making and consent-granting framework. The Strategy does not provide consent or establish a framework for granting consent and does not contribute towards a framework for granting consent. The Strategy is not binding on any decisions relating to the granting of consent. The Strategy does not introduce rules, limits, or other criteria to be used in development management. The Strategy solely sets out recommendations that may be considered for integration into Statutory documents, such as the South Dublin County Development Plan.

In order to be realised, the types of projects referred to in the Strategy will have to comply, as relevant, with various legislation, policies, plans and programmes (including requirements for lower-tier environmental assessment and other licencing requirements as appropriate) that form the statutory decision-making and consent-granting framework. As such, implementation of the Strategy is wholly subject to the requirements set out in these documents, including provisions relating to sustainable development, environmental protection and environmental management, and does not introduce any alterations or additions to those provisions. It is a specific provision of the Strategy to ensure that all of the provisions from the current County Development Plan (including those identified in the accompanying Screening for SEA report) shall be complied with throughout the implementation of the Strategy.

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# Foreword

**This Economic Strategy sets out a bold vision for sustainable, inclusive, and innovation driven growth, anchored in the ambition to create 1,500 new jobs each year and strengthen South Dublin's position as one of Ireland's most dynamic urban economies.**

Rooted in the principles and objectives of the Regional Spatial and Economic Strategy, and evolving from our Local Economic and Community Plan, it identifies where economic value, employment potential, differentiation and innovation intersect, focusing effort on the sectors with the greatest capacity to deliver smart, scalable, and resilient growth, all aligned with our corporate purpose of creating greater

## “Opportunity for all.”

Existing significant economic assets provide a strong starting point. With an economy already worth an estimated Gross Value Added (GVA) of €22.1bn, our ambition is to provide the context and support for potential growth of €28.2bn over the next five years. Already a great place to live, we are striving to improve amenities, mobility and cultural capital for residents and visitors.

Our core strengths lie in our people, our strong economic base and our connectivity. With a young, diverse, and highly skilled workforce, a strong talent pipeline and a business ecosystem spanning global and indigenous companies, South Dublin has the foundation for long-term success. We already have significant capability across core sectors – life sciences, industry and manufacturing, digital services and retail which will remain and grow as central pillars of local employment.

Our aim is to diversify and build leadership in fast growth areas including creative and media, food and beverage, and govtech. Such sectoral development will be underpinned by capacity building across areas which enable both sector growth and quality of life for our residents – including hospitality and tourism, construction, logistics and warehousing.

We, like other counties across Ireland, face challenges from rising costs, geopolitical influences, satisfying the housing and infrastructure demand and the need for climate adaptation, all of which require a more coordinated, forward-looking place-based approach to economic planning. Large scale regeneration in Tallaght and City Edge pose additional challenges in supporting relocation within the county for existing businesses and in ensuring regeneration activities strengthen local employment opportunities.

This strategy responds with clear priorities: to empower enterprise, foster innovation and invest in infrastructure to support continued development and growth and above all to reflect, capture and harness collaboration and shared ambition for economic prosperity that impacts on everyone here. It has been shaped by business leaders, education providers, local and regional government, and the wider stakeholder community, all committed to a common goal: to make South Dublin an exemplar of sustainable urban growth. With continued partnership, targeted investment and strong governance, we can ensure this is a place where we meet the needs and ambition of everyone here.



**Colm Ward**  
Chief Executive



# Executive Summary

**With a population of more than 300,000 and an economy generating an estimated €22bn+, South Dublin is one of Ireland's most dynamic urban counties – diverse, connected, and ambitious.**

Building on South Dublin's strong economic base, this Economic Strategy charts a clear path for the next five years: to create 1,500 new jobs annually, deliver at least 15% growth in Gross Value Added (GVA), and achieve national and international leadership positions through focused sector development and innovation-led growth.

The Strategy is guided by core values that reflect both economic value and balance: people-centred progress, innovation and enterprise, sustainability, and a strong sense of place and community. These

principles underpin every element of the Strategy, ensuring that growth remains inclusive, has built in resilience, and aligned with South Dublin's distinct identity.

Grounded in a comprehensive evidence base, the Strategy draws on an extensive data through its baseline assessment, detailed employment and sector audits, consultations with local, regional, and national stakeholders, benchmarking against domestic locations, and taking account of international best practice. The analysis also includes a deep dive into POWSCAR data<sup>1</sup>, providing valuable insights into workforce mobility, commuting patterns, and talent dynamics, all of which inform the spatial and human dimensions of economic growth.

<sup>1</sup>Place of Work, School or College Census of Anonymised Records

The Strategy is not about aspiration, it is action-orientated, focussed around four interlinked pillars for success:

- promoting economic growth through priority SECTORS that build on existing strengths and emerging opportunities;
- ensuring employment land and SPACE are future-ready and aligned with sectoral needs;
- empowering PEOPLE through skills, access, and pathways to opportunity; and
- enhancing PLACE by creating sustainable, well-managed communities that position South Dublin for the future.

Each pillar is supported by key actions that were developed and discussed during the consultation process with local stakeholders who highlighted the challenges and opportunities. These actions set out responsibilities, timelines, and performance metrics to ensure focus and accountability.

Ultimately, delivery will depend on partnership. The ambition set out here can only be realised through collaboration between business, academia, local and national government, and communities. By working together, we can strengthen South Dublin's reputation as a leading metropolitan area, one that combines opportunity and innovation with quality of life, sustainability, and shared prosperity for all.



# Introduction

The overarching KPIs of this economic strategy are to create 1,500 new jobs per annum and to increase GVA growth based on growth scenarios as outlined in the final section of this report.

South Dublin County Council's Economic Strategy also has broader goals than pure GVA growth including wider qualitative aims of providing opportunity for all, optimised use of finite space and creating a vibrant place in South Dublin. As such, quantitative and qualitative KPIs have been set out for each section in this report to support South Dublin County Council to achieve their objectives and ensure accountability for measured improvements in South Dublin's economy.

This strategy sets out a clear framework and action plan for South Dublin, defining the priorities, interventions and partnerships required to deliver accelerated yet balanced economic growth. It aligns local ambition with regional and national policy, ensuring South Dublin can respond confidently to emerging opportunities and challenges.

With just over 300,000 residents, South Dublin is the fourth most populous county in Ireland and part of the fastest-growing metropolitan regions in the country and playing an essential role in supporting the resilience, capacity, competitiveness and reputation of the wider Dublin region and Ireland itself.

South Dublin has benefited from Ireland's success in attracting foreign direct investment and has actively supported enterprise, innovation and indigenous industry. The foundations are strong, but further progress is required to achieve our vision.

The timing of this Strategy is purposeful. Geopolitical disruption, rapid advances in AI and automation, and growing environmental pressures demand a different approach to economic development. Our residents need sustainable economic opportunities supported by high-quality living conditions - housing, mobility, services, recreation and wellbeing. This Strategy therefore takes a place-based, people-centred approach, integrating economic ambition with quality of life.

Sectoral strengths lie in pharmaceuticals, biotech,

and MedTech (with a major global pharma cluster located in Grange Castle), digital services (anchored by international firms, strong infrastructure, and vibrant innovation centres), food and beverages and a growing media and creative sector fuelled by cultural investment and local talent. South Dublin's industrial and logistics sectors provide robust entry-level job opportunities, while retail, hospitality, leisure, and tourism form integral parts of the local economy, supported by ambitious developments in transport connectivity, business parks, green economy initiatives, and community engagement.

South Dublin boasts a young, diverse, and skilled population, with professional and technical roles making up a significant share of the workforce and a strong educational base from higher certificate to PhD levels. The county's largest employment sectors include financial and professional services, retail and wholesale, healthcare, manufacturing, and education and training, with Tallaght University Hospital and two major shopping centres, The Square and Liffey Valley, serving as regional anchors.

While South Dublin possesses significant economic strengths and growth sectors, it also faces critical challenges including the rising cost of living and doing business, infrastructure and housing stock capacity constraints, the need to adapt to climate action requirements, and increasing business caution in response to global market volatility and policy uncertainty. Regeneration in Tallaght and City Edge requires a proactive approach that carefully manages the transition of existing businesses to appropriate locations across the county, turning relocation into an opportunity for consolidation, clustering and growth, rather than disruption. South Dublin's path forward requires a strong focus on strategic planning and targeted investment to overcome both internal and external economic headwinds. By fostering innovation, accelerating infrastructure delivery, building a resilient climate-ready local economy, and investing in skills and entrepreneurship, the county can effectively respond to uncertainty and help shape a prosperous, sustainable future for its businesses and communities.

A series of steps were taken in the development of this Strategy. The specific data, literature and consultation analysis outcomes, methodology for assessment and outputs are available as separate reports to the Strategy. These outputs include:

- **Baseline Assessment:** Covers the strategic sector assessment and a baseline review of employment, skills, spatial availability and key strengths of South Dublin.
- **Vista Report:** Benchmarking assessment of South Dublin on the four core principles of Invest, Live, Study and Visit against the other counties in Ireland.
- **Future Opportunities Assessment:** Reviews the future potential of South Dublin's spatial assets and alignment with sector promotional activities, skills, commuting data and place-based recommendations.
- **International Best Practice Case Studies:** Reviews international best practice examples across the recommended priority sectors for South Dublin to develop core recommendations for SDCC to develop and grow key sectors.
- **POWSCAR Report:** Assessment of CSO POWSCAR (Place of Work, School or College Census of Anonymised Records) data for the county which indicates the locations, sectors, job levels and commuting patterns of workers, to develop transport, skills and employment development recommendations.

- **Strategic Environmental Assessment (SEA) and Appropriate Assessment (AA) Screening:** Ensures that this Strategy is assessed for potential significant environmental effects (SEA) and impacts on protected sites or species (AA), so that harm is avoided or mitigated before decisions are made.

This document is a summary of all analysis completed and sets out the key actions we will deliver over the next five years. Each pillar area is clearly identified, with Pillar 1, Sectors, representing a major component of the programme. However, sector development must be supported by the complementary pillars of Space, People and Place to ensure long-term success.

This is an ambitious yet achievable programme of work. An annual review process will monitor progress against KPIs (as set out in the implementation section of this Strategy) and ensure the Strategy adapts to changing economic and market conditions over time.

# Key Economic Information

**€22.61bn**  
GVA

**439**

Hectares zoned  
employment  
lands

**425**

Hectares zoned  
regeneration  
lands

**6418**

Active  
enterprises

**150+**

Companies  
in ICT

**7 of  
top 10**

Global pharma  
companies

**301,075**

Population

**104,232**

Jobs

**136,318**

Resident labour  
force

**110+**

Companies  
in Pharma, Medtech  
and Biotech

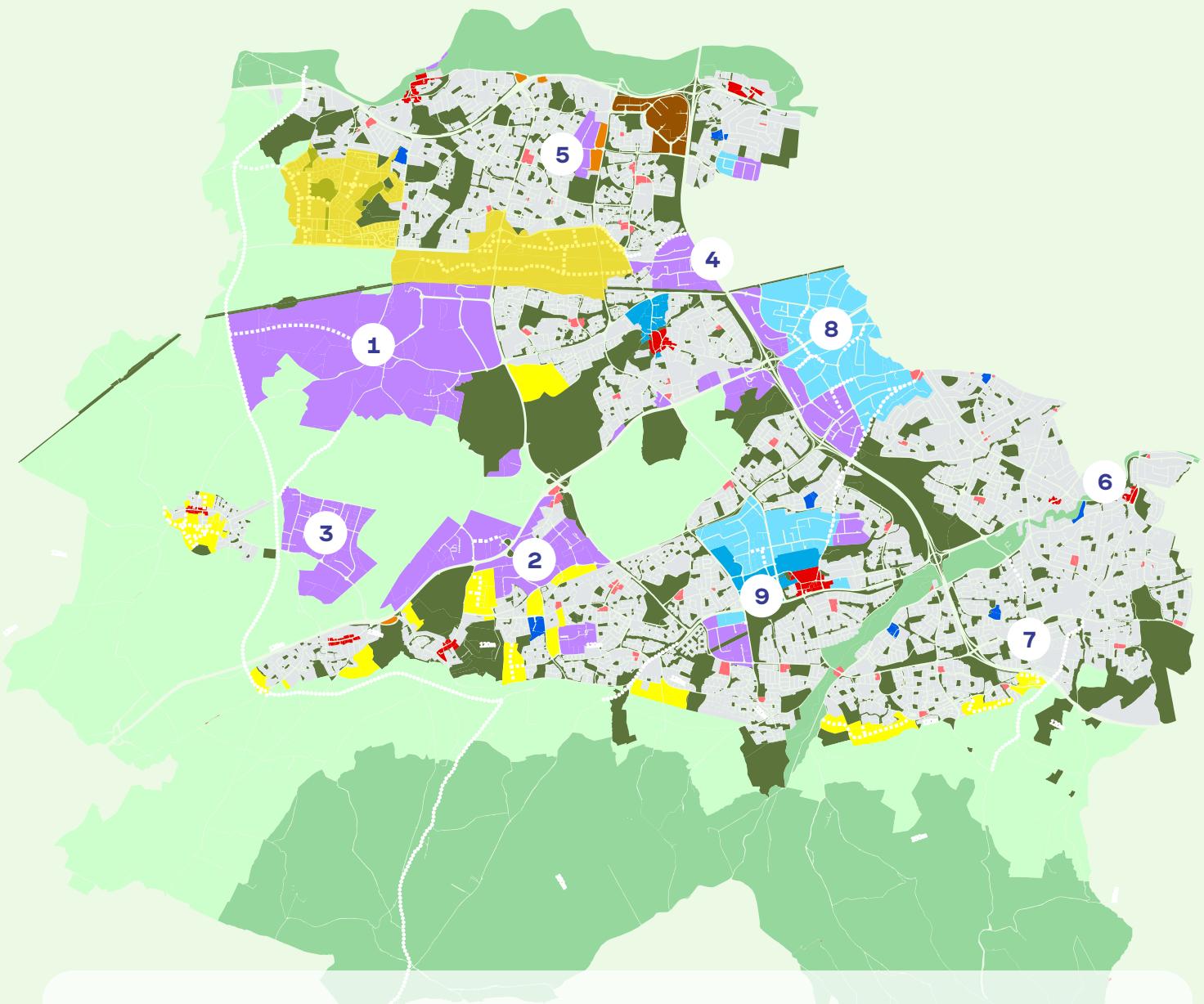
**4th**

Most popular  
for investment  
attraction in  
Ireland

**€1.5bn+**

GVA from Retail and  
Wholesale

# Key Employment Areas



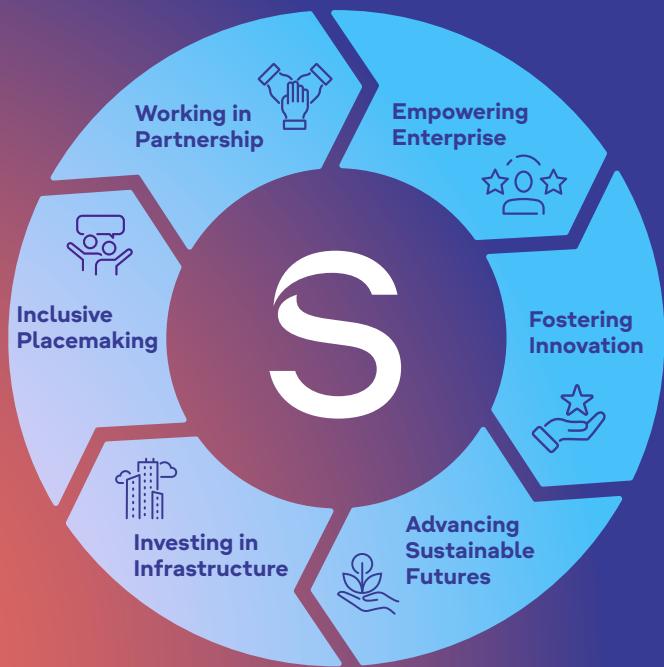
	Location	Number of Jobs	Percentage of Total Jobs
9	Tallaght LAP Area	22,138	21.2%
8	City Edge	17,345	16.6%
2	Citywest	10,482	10.1%
5	Liffey Valley / Fonthill	9,088	8.7%
4	Clondalkin	7,040	6.8%
3	Greenogue / Baldonnel	6,002	5.8%
6	Greater Rathfarnham	5,186	5.0%
7	Knocklyon	4,752	4.6%
1	Grange Castle	4,680	4.5%

- Enterprise and Employment**  
To provide for enterprise and employment related use
- Strategic Development Zone**  
To provide for strategic development in accordance with approved planning schemes
- Regeneration Zone**  
To facilitate enterprise and residential led regeneration, subject to frameworks or plan
- Town Centre**  
To protect, improve and provide for future development of Town Centres
- Village Centre**  
To protect, improve and provide for future development of Village Centres

# Our Vision

Our vision is to create a thriving, opportunity-rich county where people, enterprise, and place unite for innovation, prosperity, and a unique economic identity. Our aim is to build a resilient, diverse economic foundation that supports sustainable, inclusive growth and positions South Dublin as a leading destination providing

**Rooted in the county's central challenges and opportunities, the overarching themes of this Strategy are outlined as follows:**



# Opportunity for All.



# Our Pillars for Success

South Dublin's Economic Strategy is built on four interconnected pillars essential to sustaining long-term prosperity and competitiveness. Together they create a balanced framework that supports innovation, strengthens community wellbeing, and enables sustainable growth.



# **Pillar 1: Sectors**

South Dublin County Council will facilitate and grow a diverse economic base in South Dublin which builds on local sectoral strengths to deliver real economic growth and resilience, develops a unique economic identity for the County, and ensures a strong economic ecosystem to create opportunity and jobs for all.

## Pillar 1 Sectors Objectives



Develop a thriving creative and media sector in South Dublin, including the supportive ecosystem that will nurture skills and talent and will drive innovation and growth.



Cultivate a thriving food and drink sector in South Dublin by creating the spaces, infrastructure and supports that empower local producers and entrepreneurs to innovate and grow.



Become a leader for community innovation in GovTech and ClimateTech in South Dublin, facilitating the development of the supportive ecosystem to thrive and expanding on existing initiatives and partnerships to boost sector opportunities and strengthen messaging.



Strengthen cluster development in Life Sciences, retaining and growing existing operations and attracting new investors in conjunction with IDA.



Grow our advanced manufacturing base through strengthened innovation clusters, strategic regeneration, and accelerated digital transformation.



Strengthen the digital services economy by enhancing South Dublin's value proposition for FDI and indigenous enterprise growth, fostering tech innovation, and driving the development of STEM and digital skills.



Expand South Dublin's reputation as one of Ireland's leading retail destinations by supporting business growth, redeveloping and enhancing major retail centres, and improving connectivity and logistics to meet future consumer and market needs.



Build on its strong connectivity and strategic location to enhance efficiency, sustainability, and resilience within the transport and logistics ecosystem.



Position Financial and Professional Services as a key enabler, providing business services and supporting growth across priority sectors.



Enable development and regeneration in South Dublin through development of a skilled workforce and capacity for innovation in construction to supporting modern methods of construction, promoting sustainability, and fostering collaboration across the built environment.



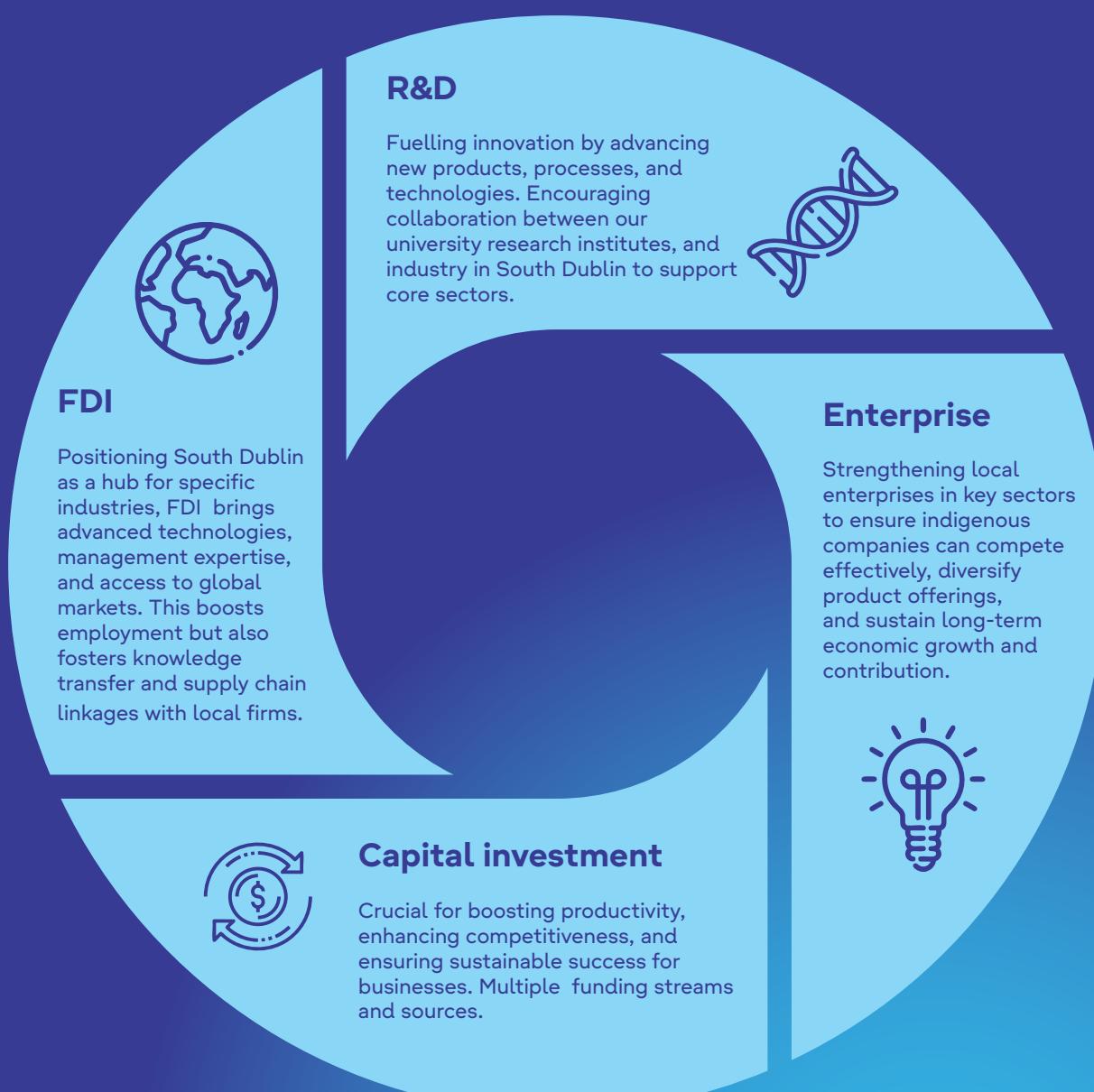
Establish a tourism proposition that showcase South Dublin's economic identity, connectivity, and build reputation as a destination for conferences and events while continuing to grow domestic and international leisure markets as outlined in the SDCC Tourism Strategy.

South Dublin County Council (SDCC) is committed to shaping an economic landscape defined by ambition and long-term impact. Its priority sectors are envisioned not merely as contributors to growth, but as catalysts for change, strengthening the county's reputation as a premier destination for foreign direct investment (FDI). At the heart of this Strategy's vision are the county's SMEs and start-ups, the engines of local resilience. By supporting these businesses, SDCC will cultivate a dynamic ecosystem where local enterprise and high-value sectors grow together.

Our analysis evaluated key focus sectors to identify those with the strongest potential to drive differentiated economic growth in South Dublin. Sector selection was informed by local company numbers and employment levels, with GVA used to capture the economic value and productivity of each sector. A two-phase modelling process was then applied to evaluate national sectoral performance against South Dublin's competitive strengths. To inform final recommendations, international benchmarking was undertaken to identify best-practice approaches used in other regions to successfully accelerate sectoral development.

## Growth Mechanisms

A series of growth mechanisms have been identified to guide efforts toward building a strong, resilient, and diverse economic base within South Dublin. These mechanisms focus on unlocking the potential of the identified sectors by supporting their development, innovation, and long-term sustainability. By targeting the specific drivers of economic activity, such as investment, enterprise support, and research collaboration, these mechanisms aim to create the conditions necessary for each sector to thrive, contribute to local employment, and strengthen the overall competitiveness of the county. The following outline the key growth mechanisms that align with the identified sectors, enabling each to be effectively supported and developed to maximise their potential and achieve sustainable economic growth for South Dublin.



## How SDCC will support our key sectors

### Identity Drivers

Nurture and grow



Creative and Media

Food and Beverage

Tech for People and Place

### Growth Engines

Develop and empower



Pharma, Biotech, Medtech

Industry and Manufacturing

Retail and Wholesale

Digital Services

### Ecosystem Enablers

Monitor and support



Hospitality, Leisure and Tourism

Financial and Professional

Logistics and Warehousing

Environment and Renewables

Construction and Real Estate

**Identity Drivers** are the sectors that distinguish South Dublin's economy, combining strong national economic performance with unique local advantages. These emerging sectors offer opportunities to shape a distinct economic identity for the county, strengthening its competitiveness and visibility.

**Growth Engines** are sectors with proven success in South Dublin and strong economic impact both nationally and internationally. They represent established areas of strength that should be further supported and promoted to drive continued expansion, innovation, and job creation in line with South Dublin County Council's core vision for sustained economic growth.

**Ecosystem Enablers** contribute towards a diverse and future-proof economic base. While analysis indicated these sectors are not main drivers of growth, their importance is essential. They support a broad range of sectors to make the economy more resilient, with balanced local opportunities. They also ensure that South Dublin has the infrastructure, services, and cultural assets needed to provide opportunity across all sectors.



# Identity Drivers

**Nurture and grow**

## Creative and Media

Develop a thriving creative and media sector in South Dublin, including the supportive ecosystem that will nurture skills and talent and will drive innovation and growth.



**254**  
companies already  
located here



**3448**  
people  
employed



**€91m**  
local economic  
value

### Key highlights

Planned investment in Grange Castle, 12th Lock and City Edge; supportive institutions Rua Red and Tallaght Civic Theatre

### Key ambitions

	Lead partners	Priority
Support and promote development of the creative and media sector in South Dublin internationally.	<i>Screen Ireland, IDA Ireland, Business Park Owners, Enterprise Ireland, Local film production companies</i>	Medium
Support the development of the enabling environment for the existing and emerging creative and media sector.	<i>Screen Ireland, Civic Theatre, Rua Red, Design and Craft Council of Ireland, SDCC, LEO, South Dublin Chamber</i>	High
Support skills and workforce development for the creative and media sector.	<i>TU Dublin, IADT (DLR), DDLETB, Screen Ireland, Arts Council, Civic Theatre, Creative Ireland</i>	High

### How we're going to support this sector - key actions (Led by SDCC with support from partners)

	Timeframe
1.1.1 Engage with industry expertise to support the development of the sector.	Ongoing
1.1.2 Enhance the creative and media sector through LEO mentoring and support for future funding opportunities.	Mid (1-2 years)
1.1.3 Establish a Creative and Media Forum to engage with state bodies and relevant agencies to advance the development of the sector in the county.	Mid (1-2 years)
1.1.4 Undertake a feasibility study to inform the infrastructure and ecosystem needs to support this industry sector.	Mid (1-2 years)
1.1.5 Support appropriate workforce skills development promotion through apprenticeships/ linkages with existing arts and cultural entities (Civic theatre) and links with educational entities (TU Dublin, DDLETB, IADT in DLR) in South Dublin and Screen Ireland.	Ongoing
1.1.6 Develop a Council led studio development at 12th Lock and create opportunities for progression pathways and skills development within the 12th Lock studio.	Long (3-5 years)

### How the sector will grow?



FDI



Capital Investment



Enterprise

### Who we've benchmarked against?

Montréal, Canada, Belfast, UK, Aukland, New Zealand, Salford, UK

# Food and Beverage

Cultivate a thriving food and beverage sector in South Dublin by creating the spaces, infrastructure and supports that empower local producers and entrepreneurs to innovate and grow.



**183**  
companies already  
located here



**3287**  
people  
employed



**€196m**  
total  
wages

## Key highlights

Planned investment in a food hub for Tallaght; success of Priory Market

## Key ambitions

	Lead partners	Priority
Develop infrastructure to support sector and create value proposition for South Dublin	<i>TU Dublin, LEO, Dublin Food Chain, private sector companies</i>	<b>High</b>
Develop Food and Drink Strategy and enhance support mechanisms to foster and grow the sector	<i>Dublin Food Chain, LEO, Partas, Priory Market, Bord Bia, ACE Enterprise Park, TU Dublin, private sector, South Dublin Chamber</i>	<b>Medium</b>
Develop local network, and strategy linkages to support the food and drink sector	<i>Dublin Food Chain, LEO, Partas, Priory Market, ACE Enterprise Park, SDCP, FoodCloud, TU Dublin, private sector, South Dublin Chamber</i>	<b>High</b>

## How we're going to support this sector - key actions (Led by SDCC with support from partners)

		Timeframe
1.1.7	Support the development of co-manufacturing space for food production/shared kitchens by the development of a food hub in Tallaght to nurture the progress of local artisan food sector and enable local SMEs to scale up.	Long (3-5 years)
1.1.8	Conduct feasibility studies into further scale up space (1000/1,500 square feet units lacking across the region) and specific kitchen types.	Mid (1-2 years)
1.1.9	Facilitate the development of a Food and Beverage Strategy for South Dublin.	Mid (1-2 years)
1.1.10	Support and raise awareness of the activities of the Dublin Food Chain and LEO to run training programmes, trade exhibitions and signposting services to food industry startups and SMEs.	Mid (1-2 years)
1.1.11	Develop a calendar of events for food markets and festivals for the County to support local SMEs and start-ups.	Mid (1-2 years)

## How the sector will grow?



R&D



Enterprise

## Who we've benchmarked against?

Ghent, Belgium, Lisbon, Portugal, Portland, Ohio

# Tech for People and Place

Become a leader for community innovation in GovTech and ClimateTech in South Dublin, facilitating the development of the supportive ecosystem to thrive and expanding on existing initiatives and partnerships to boost sector opportunities and strengthen messaging.



**159**  
companies already  
located here



**8231**  
people  
employed



**€4.2bn**  
local economic  
value

## Key highlights

Tallaght Innovation Quarter (including Work IQ), Clondalkin Decarbonisation Zone

## Key ambitions

	Lead partners	Priority
Support for SMEs and Startups - Develop an SDCC testbed function to support GovTech applications	<i>Work IQ (Oxford innovation space), Enterprise Ireland, TU Dublin, SDCC, private sector, LEO</i>	<b>High</b>
Facilitate the development of a supportive ecosystem for innovation to develop the sector	<i>Work IQ, SDCC, TU Dublin, local schools and civic groups, LEO</i>	<b>High</b>
Expand on existing initiatives and partnerships to boost sector opportunities and strengthen messaging	<i>Smart Dublin, Enterprise Ireland, TU Dublin, South Dublin Chamber</i>	<b>Medium</b>

## How we're going to support this sector - key actions (Led by SDCC with support from partners)

	Timeframe
1.1.12 Establish Tallaght Innovation Quarter to develop a testbed for GovTech. Explore an appropriate GovTech event to host in the county to showcase this ambition.	Mid (1-2 years)
1.1.13 Enable SMEs and start-ups to testbed ClimateTech solutions through Council projects and initiatives, such as Clondalkin Decarbonising Zone, to support the initiatives indicated in the SDCC Climate Action Plan.	Mid (1-2 years)
1.1.14 Develop a Smart City Quarter in the County to support climate action and government initiatives utilising Beyond County Hall Innovation Fund	Mid (1-2 years)
1.1.15 Develop a partnership between Work IQ, TU Dublin, TUH to develop tech innovation and support job creation.	Short (6-12 months)
1.1.16 Capitalise on Smart Dublin initiatives and develop experimental urban solutions such as Mobility Hubs (shared e-bikes and vehicles), supporting sustainable transport and improved wellbeing; expand use of open data and citizen participation platforms.	Ongoing

## How the sector will grow?



R&D



Enterprise

## Who we've benchmarked against?

Tallinn, Estonia, Espoo, Finland



# Growth Engines

Develop and empower

# Pharma, Biotech, Medtech

Encourage the growing research, development, and innovation activity in global and national companies located in South Dublin, delivering world-leading practices and posting high GVA contribution, high-skilled job opportunities and high-salaries.



## Key highlights

7 of the top 10 global pharma companies; anchored by Grange Castle; support institutions include TU Dublin and TUH

## Key ambitions

	Lead partners	Priority
Strengthen FDI and Cluster Development for the pharma, biotech and MedTech sector	IDA, Grange Castle companies, Enterprise Ireland, TU Dublin, TUH	High
Build Research, Development and Innovation Ecosystem	TU Dublin, TUH, Enterprise Ireland, LEO	High
Prioritise Infrastructure, Skills and Innovation Pathways	NTA, BusConnects, Luas, Irish Water, ESB, TU Dublin, DDLETB, private sector, South Dublin Chamber	Medium

## How we're going to support this sector - key actions (Led by SDCC with support from partners)

	Timeframe
1.2.1 Develop a communication strategy to support FDI in this sector, including enhancing South Dublin's sector value proposition.	Mid (1-2 years)
1.2.2 Support Grange Castle Business Park: Implement the Grange Castle Master Plan by activating its placemaking and support infrastructure, upgrading shared services, utilities and resources that reduce operational barriers for tenants to support the creation of 12,000 jobs.	Mid (1-2 years)
1.2.3 Develop identifiable clusters and supporting ecosystems for this sector across the county.	Long (3-5 years)
1.2.4 Investigate the potential to develop SDCC-led wet lab incubator/accelerator in the County to promote pharma R&D.	Mid (1-2 years) - Long (3-5 years)

## How the sector will grow?



## Who we've benchmarked against?

Cambridge, UK, Columbus, Ohio

# Industry and Manufacturing

Enable the development of this critical and robust sector in line with sustainability and modernisation needs, to continue to provide high valued added local jobs and maximise the potential of light manufacturing compatible with urban development.



## Key highlights

Top sector for GVA, sector with greatest number of indigenous firms; anchored by Grange Castle, Greenogue, Aerodrome and Baldonell

## Key ambitions

	Lead partners	Priority
Grow advanced manufacturing in innovation clusters by marketing collaboration, co-location, and infrastructure	<i>IDA, Enterprise Ireland, Irish Manufacturing Research, Business Park owners, private sector, South Dublin Chamber</i>	High
Realise regeneration opportunities and sector transitions	<i>City Edge team, property consultants, private sector</i>	Medium
Accelerate innovation and digital transformation through partnerships and national supports	<i>Irish Manufacturing Research, Enterprise Ireland, LEO, TU Dublin</i>	Medium

## How we're going to support this sector - key actions (Led by SDCC with support from partners)

		Timeframe
1.2.5	Support Grange Castle as a location for advanced manufacturing, highlighting talent, facilities, and accessibility.	Ongoing
1.2.6	Attract new investment through targeted campaigns focused on collaborative innovation and supply chain integration.	Ongoing
1.2.7	Carry out an analysis of the current sectors within regeneration areas to identify opportunities for business relocation within the County.	Mid (1-2 years) - Long (3-5 years)
1.2.8	Facilitate connections between local firms and Irish Manufacturing Research for Industry 4.0 and clean technology adoption as well as Smart Specialisation.	Ongoing
1.2.9	Champion energy efficiency and renewable generation infrastructure development.	Ongoing

## How the sector will grow?



R&D



Enterprise

## Who we've benchmarked against?

Sheffield, UK, Mannheim, Germany

# Digital Services\*

Strengthen South Dublin's digital services value proposition to attract FDI and enterprise growth by supporting innovation, STEM and digital skills development, and positioning the County as a leader in next-generation digital infrastructure.



**159**  
companies already  
located here



**8231**  
people  
employed



**€4.2bn**  
local economic  
value

## Key highlights

Anchored by Grange Castle and Citywest, Tallaght Innovation Quarter

## Key ambitions

	Lead partners	Priority
Strengthen South Dublin's digital services value proposition to attract FDI and enterprise growth	IDA, LEO, private sector MNEs and datacentre operators	High
Support innovation and enterprise development for ICT/digital services	Work IQ, Enterprise Ireland, LEO, Adamstown Enterprise Centre, South Dublin Chamber, private sector	High
Drive STEM and digital skills development in collaboration with educational and enterprise partners	TU Dublin, DDLETB, Amazon, Citywise	High
Position South Dublin as a leader in next-generation digital infrastructure	Utility providers, IDA, Enterprise Ireland, community networks	Medium

## How we're going to support this sector - key actions (Led by SDCC with support from partners)

	Timeframe
1.2.10 As part of a communication strategy, define and market South Dublin's advantages in fibre connectivity, datacentres, MNE case studies, skills base and location as Ireland's digital connectivity hub , to develop clear FDI value proposition.	Mid (1-2 years)
1.2.11 Facilitate the roll out of 'Grow Digital', funded by LEO, to assist small businesses optimise digital systems.	Short (6-12 months)
1.2.12 Develop a network of innovation centres and coworking spaces for digital services, including new hubs like Adamstown Enterprise Centre, to support SMEs and tech start-ups.	Ongoing
1.2.13 Facilitate the expansion of key innovation growth areas, notably digitisation, AI, and semiconductor activity, through business-led initiatives and skills development.	Ongoing
1.2.14 Support development of network for STEM and digital skills progression, working with partners like TUD Dublin, DDLETB, and tech enterprises (e.g., Think Big Space).	Mid (1-2 years)

## How the sector will grow?



**FDI**



**Enterprise**



**R&D**

\*Digital Services is a wider encompassing sector in South Dublin which incorporates ICT, data services, and datacentres

## Retail and Wholesale

Support investment, innovation, and vibrant town centres that drive employment, attract visitors, and enhance the county's competitiveness as a leading shopping and business destination.



**1354**  
companies already  
located here



**16,781**  
people  
employed



**€1.56bn**  
local economic  
value

### Key highlights

Anchored by The Square and Liffey Valley Shopping Centres, wholesale hub in Ballymount

### Key ambitions

	Lead partners	Priority
Deliver targeted supports for business and sector knowledge	<i>LEO, South Dublin Chamber, Partas</i>	<b>High</b>
Expand and redevelop major retail destinations and strategic sites	<i>The Square, property owners, retail management firms, Liffey Valley Shopping Centre</i>	<b>Medium</b>
Improve retail connectivity and logistics for future growth	<i>NTA and transport authorities, business park owners</i>	<b>Medium</b>

### How we're going to support this sector - key actions (Led by SDCC with support from partners)

		Timeframe
1.2.15	Pilot a Business Improvement District focused on collaborative investment, marketing, and service improvements.	Mid (1-2 years )
1.2.16	Provide funding and mentoring support for evening time economy businesses in Tallaght Town Centre.	Ongoing
1.2.17	Roll out a business support fund to support micro enterprise development and industrial area improvements.	Mid (1-2 years) - Long (3-5 years)
1.2.18	Support investment in Tallaght and Liffey Valley as regional retail hubs.	Ongoing
1.2.19	Encourage a mix of retail, hospitality, leisure, and community uses to create vibrant destinations, increase dwell time, and make centres attractive for both local residents and regional visitors.	Mid (1-2 years)
1.2.20	Identify and promote warehousing in strategic business and logistics parks with direct access to major roads.	Mid (1-2 years) - Long (3-5 years)

### How the sector will grow?



**FDI**



**Capital Investment**



**Enterprise**



# Ecosystem Enablers

**Monitor and support**

# Hospitality, Leisure and Tourism

Strengthen the hospitality, leisure, and tourism sector by investing in accommodation, event spaces, and placemaking initiatives that enhance the county's appeal, support business tourism, and create a vibrant environment for residents, workers, and visitors.



**647**  
companies already  
located here



**8404**  
people  
employed



**€254m**  
total  
wages

## Key highlights

€100m in planned investment by SDCC in visitor destination attractions - Dublin Mountains Visitor Centre, Lucan House, Rathfarnham Castle Stables and Tallaght Stadium

### Key ambitions

	Lead partners	Priority
Capitalise on business tourism and events space opportunities	<i>Dublin Convention Bureau, Fáilte Ireland, Tourism Ireland, venue operators and hotel groups</i>	Medium
Support the rollout of the 5-year Tourism Strategy	<i>Fáilte Ireland, sector operators, NTA and transport bodies</i>	High

### How we're going to support this sector - key actions (Led by SDCC with support from partners)

	Timeframe
1.3.1 Explore the feasibility of the development of a large-scale convention centre, additional tourist hotel accommodation and hospitality services within the County.	Mid (1-2 years)
1.3.2 Collaborate with the Convention Bureau to carry out an audit of the County's events facilities to align with smaller events and the promotional efforts of the Convention Bureau.	Mid (1-2 years)
1.3.3 Pilot the hosting of a large scale concert in Tallaght Stadium.	Mid (1-2 years) to Long (3-5 years)
1.3.4 Explore the feasibility and opportunities of creating a calendar for targeted events and conferences in the County including international business events, niche sector events, academic conferences, digital and hybrid events.	Mid (1-2 years)
1.3.5 Explore the feasibility of developing a single legal entity owned by SDCC to manage and operate the various visitor properties.	Long (3-5 years)

# Financial and Professional Services

Support the financial and professional services sector by promoting its role as a key business enabler, attracting firms to strategic locations and regeneration areas, and supporting sustainable growth through improved connectivity and modern mixed-use environments.



**826**  
companies already  
located here



**23,081**  
people  
employed



**€2.89bn**  
local economic  
value

## Key highlights

Largest employment sector in the county; anchored by Citywest and potential in City Edge

### Key ambitions

	Lead partners	Priority
Position FPS as a key enabler, providing business services and supporting growth across priority sectors.	<i>Major FPS companies, coworking hub operators, LEO, Citywest management, South Dublin Chamber</i>	<b>Medium</b>
Support sector operations and talent access through regeneration and transport-oriented planning.	<i>South Dublin Chamber, NTA and other transport bodies, City Edge project team.</i>	<b>Low</b>

### How we're going to support this sector - key actions (Led by SDCC with support from partners)

	Timeframe
1.3.6 Encourage FPS firms, including SMEs and startups, to locate in priority business areas (Citywest, REGEN areas) near key clients and industries. Support the clustering of FPS sector in Citywest and City Edge.	Ongoing
1.3.7 Promote collaborative opportunities such as coworking spaces and business hubs.	Ongoing
1.3.8 Guide 'back-office' and support operations to regeneration areas to make use of skilled local workforce, mixed-use environments, and strong public transport connectivity.	Ongoing

## Logistics and Warehousing

Maintain South Dublin's position as a leading logistics and warehousing hub, whilst driving sustainable practices, through promoting well-connected sites, supporting sustainable infrastructure upgrades, and enabling efficient supply chains that drive growth in other key sectors.



**272**  
companies already  
located here



**6537**  
people  
employed



**€314m**  
total  
wages

### Key highlights

Transport links to M50, N7, N4/M4,  
strategic locations of Greenogue,  
Aerodrome, Ballymount

### Key ambitions

	Lead partners	Priority
Strengthen South Dublin's role as a location for logistics and warehousing to support key sectors.	<i>South Dublin Chamber, business park owners and developers, logistics companies, property consultants, NTA, SDCC.</i>	<b>Medium</b>
Support the modernisation and sustainable growth of the logistics sector.	<i>Business developers, utilities and infrastructure providers, Smart Dublin, Enterprise Ireland, other Dublin local authorities.</i>	<b>Low</b>

### How we're going to support this sector - key actions (Led by SDCC with support from partners)

		Timeframe
1.3.9	Explore the feasibility of identifying strategic areas for logistics and warehousing within the county.	Mid (1-2 years) - Long (3-5 years)
1.3.10	Consider last-mile delivery options and lighter logistics operations in industrial estates focused on urban-compatible industrial activity.	Ongoing
1.3.11	Encourage infrastructure upgrades and adoption of green technologies (EV charging, shared depots) within existing and future logistics parks.	Long (3-5 years)
1.3.12	Support the sector transition to green energy practices and advanced automation.	Ongoing

### Who we've benchmarked against?

West Northamptonshire, UK, Maastricht, Netherlands

# Environment and Renewables

Drive green growth by advancing renewable energy projects, supporting decarbonisation across key sectors, and fostering skills and innovation that strengthen sustainability and climate action throughout the county.



**24**  
companies already  
located here



**923**  
people  
employed



**€55bn**  
total  
wages

## Key highlights

Heat Works district heating project,  
Tallaght Smart Grid, Clondalkin  
Decarbonisation Zone

### Key ambitions

	Lead partners	Priority
Enable best practice and pathways for environmental sustainability.	<i>Skillnet Climate Ready Academy, SOLAS, DDLETB, Green Skills Academy</i>	<b>Low</b>
Support decarbonisation and integrated green planning across the county.	<i>Codema, CARO, SEAI, TU Dublin, Irish District Energy Association (IrDEA)</i>	<b>Medium</b>
Advance strategic initiatives supporting green energy and climate action goals.	<i>Heat Works, Amazon, Department of Climate, Energy and the Environment</i>	<b>Medium</b>

### How we're going to support this sector - key actions (Led by SDCC with support from partners)

		Timeframe
1.3.13	Align with county, national and European strategies (South Dublin Climate Action Plan, European Green Deal, IDA Strategy) to support decarbonisation in sectors such as construction, manufacturing, and logistics.	Long (3-5 years)
1.3.14	Explore the feasibility of developing an integrated energy plan to examine district heating and electricity supply within the county.	Long (3-5 years)
1.3.15	Support ongoing implementation of the Clondalkin Decarbonisation Zone Plan.	Mid (1-2 years)
1.3.16	Facilitate the roll out of the Energy Efficiency Grant, funded by LEO, to help small businesses invest in green technology and equipment.	Long (3-5 years)

# Construction and Real Estate

Support the construction and real estate sector by promoting sustainable development, modern construction methods, and strategic site access that support regeneration, housing delivery, and long-term economic growth across the county.



**459**  
companies already  
located here



**923**  
people  
employed



**€748m**  
total wages

## Key highlights

Strategic Development Zones in Adamstown and Clonburris, high construction activity levels and presence of key players.

### Key ambitions

	Lead partners	Priority
Enable development and regeneration through strategic location and skills.	<i>Property and construction companies, MMC Ireland, DDLETB, Irish Green Building Council</i>	<b>Low</b>
Support innovation and sustainability in construction practices.	<i>MMC Ireland, ESB, SDCC</i>	<b>Low</b>

### How we're going to support this sector - key actions (Led by SDCC with support from partners)

		Timeframe
1.3.17	Encourage construction and real estate businesses to locate near logistics hubs and transport routes, supporting efficient material supply and access to development sites.	Ongoing
1.3.18	Support adoption of modern methods of construction (MMC), such as modular building and quick-assembly units, by promoting media partnerships, green innovation studios, and collaborative sector events.	Long (3-5 years)
1.3.19	Collaborate with key infrastructure / utility providers such as ESB, Eirgrid, Uisce Eireann in supporting the provision of key infrastructure projects to support economic development and job creation in the county.	Ongoing

## **Pillar 2: Space**

South Dublin County Council will support the optimisation of every hectare of employment land in South Dublin so that space actively powers innovation, inclusion, and prosperity, ensuring that the County's employment sites are future-ready, resilient, and aligned with the evolving needs of people, businesses and place.

## Pillar 2 Space Objectives



Boost sector compatibility within key areas through identifying and enabling development ready spaces that match the needs of our priority sectors.



Develop clusters for our growth sectors through designation of areas and encouraging co-location of businesses within similar industries to enhance and fuel innovation.



Support relocation from regeneration areas through consistent implementation of actions and promotion of our two transformative urban projects in City Edge and Tallaght.



Support land extensive uses through consolidation and adoption of best in class low carbon practices to retain and evolve our strategic position in this area.



Futureproof our local economy and potential for job creation through development of a framework for future employment land identification.





## A County shaped by purposeful space

South Dublin's economic success is rooted in its spatial advantages. From Grange Castle's global manufacturing ecosystem to the regeneration corridors of City Edge and Tallaght, the county's prosperity has been built on smart land use, visionary zoning and its strategic connectivity.

Yet space is a finite resource, and how it is planned and used will define the future of its growth. South Dublin County Council (SDCC) will position South Dublin's employment land as a driver of economic transformation, supporting both scale and sustainability. This is not simply about allocating land; it is about creating a spatial economy that maximises opportunity, supports innovation clusters, enables inclusion, and future-proofs South Dublin as a leading location for enterprise and talent.

This Strategy draws on the research of the South Dublin County Development Plan 2022 – 2028 (CDP) 2 Year Progress Report (Dec 2024), the Future Opportunities and Recommendations Study (as part of this Strategy research), and SDCC's land use frameworks such as the City Edge Strategic Framework, Tallaght Town Centre LAP 2020, and Grange Castle Masterplan. The approach further integrates spatial data analysis, stakeholder consultation, and spatial capacity mapping (using GeoDirectory 2024 and POWSCAR 2022) to align economic ambition with spatial reality.

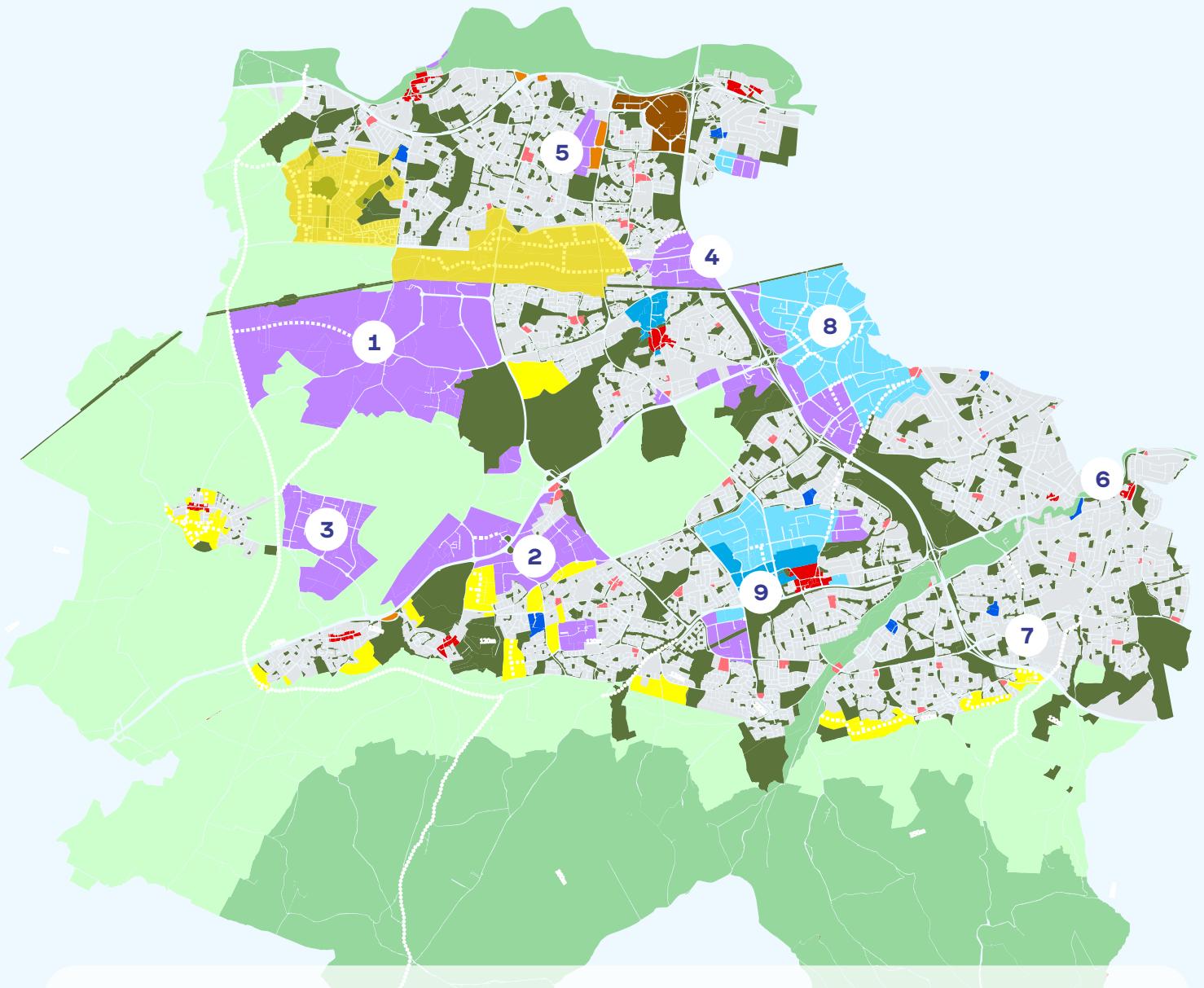
## South Dublin's spatial portfolio

South Dublin hosts one of the most dynamic employment land portfolios in Ireland which includes approximately 1,000 hectares of active employment land across several land use zonings (indicated in the CDP) - Enterprise and Employment (EE), Regeneration (REGEN), and Town / Village Centres, with additional potential in Strategic Development Zones. Key employment clusters include Grange Castle, Cityedge, Baldonnell, Greenogue, Citywest, Clondalkin and Tallaght, each serving distinct sectoral niches.

From employment projections based on prevailing job densities<sup>1</sup>, the CDP 2 Year Progress Report projected land available for approximately 34,427 jobs, much greater than the 9,168 jobs required over the lifetime of the CDP. It therefore concluded that additional zoning was unlikely to be required within the current CDP lifetime, however additional lands may be required for the next plan review due to additional population and housing growth and the review of the Regional Spatial and Economic Strategy 2019 – 2031 (RSES). However, charting a clear vision for the county's next phase of growth remains essential, ensuring that future development is guided by innovation and resilience, positioning South Dublin to thrive in an evolving economic and environmental landscape.

<sup>1</sup>Although based on current job densities, this figure may change with intensification of uses and also the review of the CDP and RSES.

# Key Employment Areas



	Location	Number of Jobs	Percentage of Total Jobs
9	Tallaght LAP Area	22,138	21.2%
8	City Edge	17,345	16.6%
2	Citywest	10,482	10.1%
5	Liffey Valley / Fonthill	9,088	8.7%
4	Clondalkin	7,040	6.8%
3	Greenogue / Baldonnel	6,002	5.8%
6	Greater Rathfarnham	5,186	5.0%
7	Knocklyon	4,752	4.6%
1	Grange Castle	4,680	4.5%

- Enterprise and Employment**  
To provide for enterprise and employment related use
- Strategic Development Zone**  
To provide for strategic development in accordance with approved planning schemes
- Regeneration Zone**  
To facilitate enterprise and residential led regeneration, subject to frameworks or plan
- Town Centre**  
To protect, improve and provide for future development of Town Centres
- Village Centre**  
To protect, improve and provide for future development of Village Centres

# How SDCC will optimise space

In order to ensure every hectare contributes to South Dublin's economic vision, this Strategy will focus on 5 key areas:

## Boost sector compatibility

Providing strategically positioned, development-ready spaces is a fundamental building block in strengthening our strategic sectors. By aligning these needs with the county's most promising sites, South Dublin can proactively shape a resilient, innovation-led economy.

## Develop clusters for our growth sectors

Developing sector clusters in South Dublin presents an opportunity to strengthen the county's competitive advantage. By bringing together businesses, talent, research institutions, and infrastructure within focused clusters, South Dublin can develop innovation across its priority sectors.

## Support relocation from regeneration areas

Anchored in Tallaght and City Edge, SDCC's regeneration vision promotes compact, future-ready growth. By securing adequate land and future-proofing employment capacity, SDCC will ensure industry relocation needs are met and South Dublin remains adaptive, resilient and investment-ready.

## Support land-extensive uses

South Dublin's land-extensive uses (including warehousing, datacentres<sup>2</sup>, construction yards and waste management) are powerful engines of economic growth. By retaining these critical industrial services while promoting compact, high-value development, South Dublin can transform its economic landscape, creating a smarter, more innovative, and resilient county where strategic industry and forward-thinking growth go hand in hand.

## Future employment land identification

South Dublin is at a pivotal economic moment as sectors shift through digitalisation and decarbonisation. With the RSES under review, SDCC must plan beyond traditional zoning, anticipating future enterprise needs, enabling clusters, and leveraging its strategic position to balance competitiveness with community well-being.

<sup>2</sup> Please note that data centres are included within Digital Services sector.

Key ambitions		
	Lead partners	Priority
Boost sector compatibility within key areas	<i>IDA, Enterprise Ireland, utility/infrastructure providers, government departments, EMRA</i>	High
Develop clusters for our growth sectors	<i>IDA, Enterprise Ireland, Work IQ, TU Dublin</i>	High
Support relocation from regeneration areas	<i>IDA, Enterprise Ireland, business park owners, local businesses and landowners</i>	Medium
Support land extensive uses	<i>South Dublin Chamber, business park and land owners, utility providers</i>	Medium
Develop a framework for future employment land identification	<i>IDA, Enterprise Ireland, utility/infrastructure providers, government departments, EMRA</i>	High

How we're going to support this pillar - key actions (Led by SDCC with support from partners)		
		Timeframe
<b>Boost sector compatibility within key areas</b>		
2.1.1	Undertake a review of zoned employment land in the county as part of the preparation for the next CDP assessing the availability of current and future land to support economic development and job creation.	Short (6-12 months)
2.1.2	Actively promote key development sites and business parks through a robust, investor-facing prospectus showcasing the unique strengths of each area or site.	Ongoing
2.1.3	Work with the relevant national and regional organisations to promote SDCC sites with top global investors and in international investment events such as MIPIM and Expo Real.	Ongoing
<b>Develop clusters for our growth sectors</b>		
2.2.1	Develop a Knowledge and Innovation Supercluster in Grange Castle and Citywest for digital services, life sciences, creative industries, and advanced manufacturing.	Long (3-5 years)
2.2.2	Develop a Civic and Innovation Cluster in Tallaght linking Work IQ, TU Dublin and Tallaght University Hospital.	Mid (1-2 years)
2.2.3	Develop an Urban Industry and Mixed-Use Growth Cluster in City Edge Regeneration area for compact, sustainable employment (supported by City Edge Framework).	Long (3-5 years)
2.2.4	Develop an Industrial and Logistics Cluster in Greenogue, Aerodrome, Baldonell for heavy industry, logistics, and construction.	Long (3-5 years)

## How we're going to support this pillar - key actions (Led by SDCC with support from partners)

		Timeframe
	<b>Support relocation from regeneration areas</b>	
2.3.1	Proactively take a lead role in supporting and incentivising appropriate businesses to relocate from regeneration areas to targeted areas and sector clusters within the county, having regard to the provisions of SDCC County Development Plan 2022 - 2028, Tallaght Town Centre LAP 2020 and City Edge Strategic Framework (and any plans and framework thereafter).	Mid (1-2 years)
	<b>Support land-extensive uses</b>	
2.4.1	Undertake a Logistics and Land-Extensive Use Study to identify and protect existing land-extensive sector clusters (warehousing, logistics, utilities) to ensure continuity of essential services.	Mid (1-2 years)
2.4.2	Encourage innovation in land-efficient design such as multi-storey warehousing, co-location with utilities and circular-economy practices, by restricting expansion in regeneration or mixed-use areas.	Ongoing
2.4.3	Promote low-carbon logistics: consolidated depots, micro-distribution hubs, and EV fleet adoption.	Ongoing
	<b>Develop a framework for future employment land identification</b>	
2.5.1	Develop a Future Employment Land Framework - a strategic, data-led process that will identify, test and prioritise sites for future economic activity.	Mid (1-2 years)
2.5.2	Establish an Employment Land Monitor to carry out employment land audits to review land availability, development readiness, infrastructure alignment and sectoral trends.	Mid (1-2 years) - Long (3-5 years)

## **Pillar 3: People**

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

## Pillar 3 People Objectives



Develop a coordinated County Skills Strategy that aligns education, enterprise, and community partners to meet evolving workforce needs.



Expand lifelong learning and upskilling opportunities so residents can gain the capabilities needed to thrive in a changing economy.



Enhance and connect employment hubs to create flexible, well-serviced spaces linking talent, enterprise, and opportunity across the county.



Integrate sustainable transport solutions around key employment locations to improve accessibility, reduce emissions, and strengthen labour market reach.



Drive quality job creation across all skill levels, ensuring opportunities reflect the county's diverse talent base and sectoral strengths.



Promote clear progression pathways through collaboration with employers and education providers, supporting continuous career development.



Champion diversity, equity, and inclusion, fostering a fair and dynamic labour market that reflects the county's communities and supports social mobility.



## A vibrant, diverse South Dublin

South Dublin County Council's Economic Strategy places people at the heart of its mission, aiming to provide opportunity for all within the county's diverse communities. The Strategy seeks to ensure that jobs and employment are both created and accessible, and that South Dublin's talent pool receives the skills and tools necessary to succeed in a rapidly changing economy. It will aim to future-proof South Dublin's workforce and businesses by preparing local jobs and skills for the evolving demands and opportunities for the future of work. A socio-economic assessment for South Dublin was undertaken to ensure this Strategy is informed by up-to date evidence on local demographics, employment, and commuting patterns, to develop appropriate actions and recommendations to nurture skills and employment in South Dublin. The assessment is evidence-led, drawing upon detailed analysis of demographic and occupational datasets, particularly data from the Central Statistics Office (CSO) and an assessment of POWSCAR (Place of Work, School or College Census of Anonymised Records) by People&Place<sup>1</sup>.

The approach that was taken to understand the socio-economic profile of the county and develop key actions to support a people centred Strategy incorporates the following:

1. Current and historic census data for population, employment, and sectoral trends.
2. Occupational and education profiling at county and sub-county levels.
3. Commuting patterns analysis to determine alignment between local jobs and skills, as well as dependence on external skills coming into the County.
4. Sectoral growth/decline assessment by comparing recent trends with the wider Dublin region and national averages.
5. Use of geographic mapping to identify employment hubs, density hotspots, infrastructure gaps, and commuting flows.

South Dublin's resident base presents high diversity in qualifications and occupations, which matches the varied industries in the county's economy and is supported by strategies such as the South Dublin County Development Plan 2022-2028 and South Dublin Local Economic and Community Plan 2024-2026. Although many pathways exist for skills and talent development through local institutions, the county lacks a comprehensive skills strategy with accessible mapping for businesses and individuals. South Dublin acts as both a source and destination for employment, with 48.4% of local job holders living outside the county and 39.5% of the local economically active population working within it. High levels of commuting by private transport (up to 90% in some employment hubs) highlight the need to promote active travel and public transport for a sustainable workforce future. The key recommendations for this dimension of the Strategy focus on actionable areas that support economic opportunity, inclusion, and skill development across all segments of the county.

<sup>1</sup> People and Place is a spin-out company from Maynooth University, with roots in the renowned socio-demographic research and expertise of the All-Island Research Observatory (AIRO) within the Maynooth University Social Sciences Institute (MUSSI).

## Population trends in South Dublin:

**301,075**

Population 2022

**+8%**

Change 2016-2022



**Population**

**57.8%**

Residents employment 2022

**+2.3%**

Change 2016-2022



**Employment**

**5.5%**

Unemployment 2022

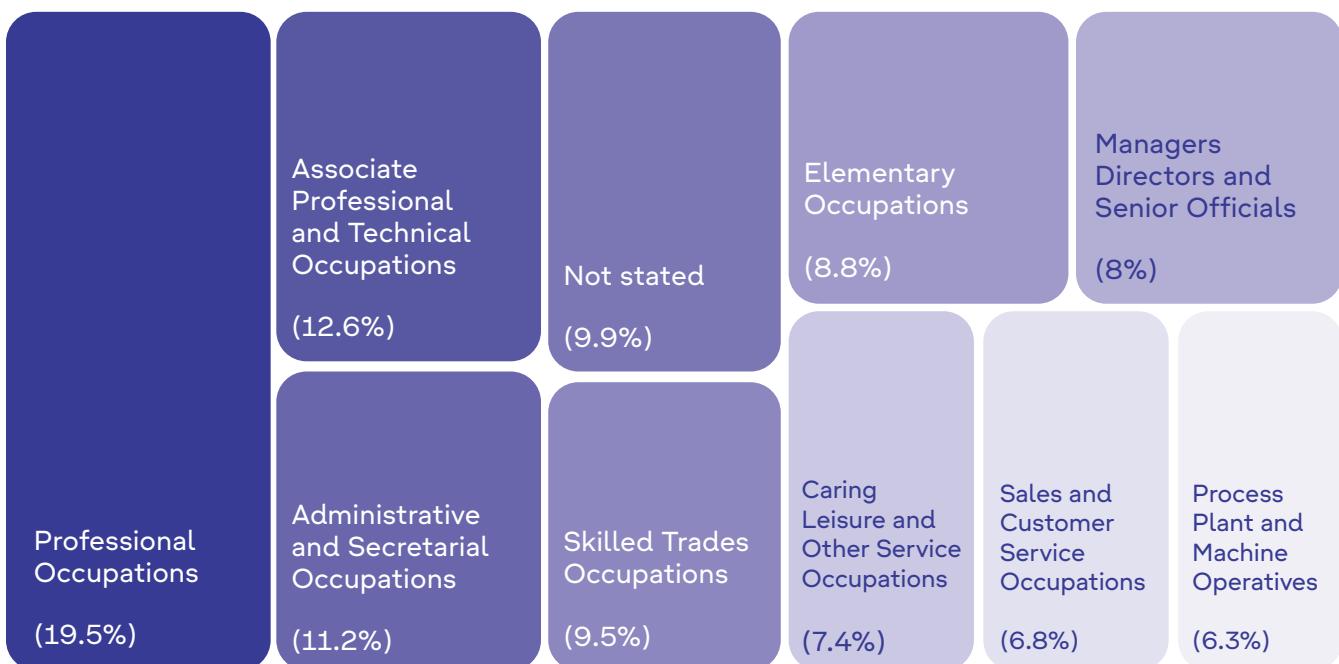
**-3%**

Change 2016-2022



**Unemployment**

## Occupations in South Dublin



The majority of people are in professional occupations (19.5%) and associate professional and technical occupations (12.6%). This indicates a skilled workforce in a knowledge-based or service-oriented economy, demonstrating a workforce suitable for a number of the identified priority sectors such as Digital Services and Pharma/Biotech/Medtech. The relatively high level of administrative and secretarial occupations (11.2%) reflects continued demand for support roles in office-based environments.

## Educational attainment in South Dublin

No formal education – lower secondary

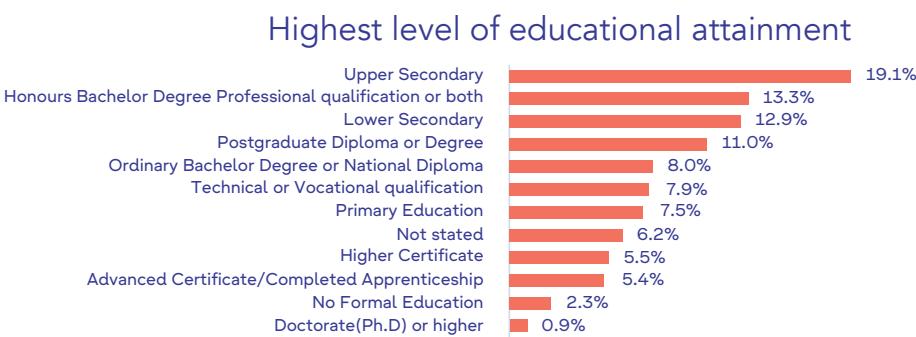
**22.7%**

Upper secondary – Adv. Cert.

**32.4%**

Higher cert - PhD

**38.7%**

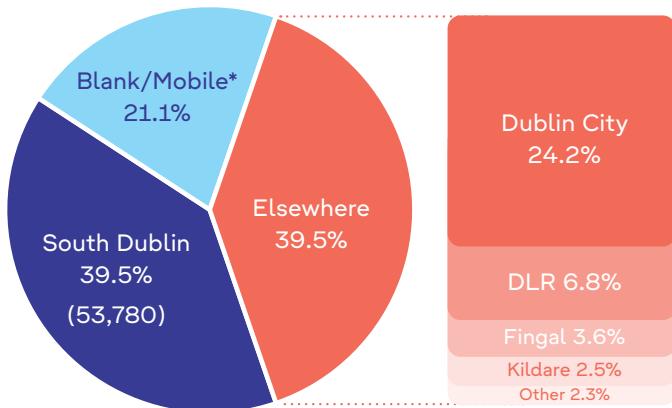


This trend follows the education level, with the majority of people attaining an education level of higher certificate to PhD (38.7%). The high percentage of those with upper secondary to advanced certificate (32.4%) also aligns with occupations in the associate professional and technical roles.

## Commuting patterns

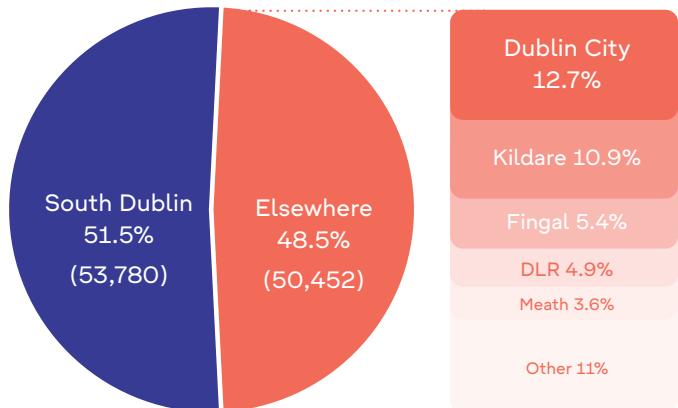
South Dublin is a commuter-heavy county, with high levels of commuting both into and out of the county. The relatively high volume of resident workers compared to available jobs reflects an interconnected regional employment network, with 39.4% of South Dublin residents enabled to access employment in neighbouring areas. Similarly, 48.4% of jobs in South Dublin are filled by inward commuters from neighbouring areas, underlining South Dublin's role as an attractive employment hub not only for residents but also for job-seekers from surrounding areas.

### Where South Dublin's residents are employed



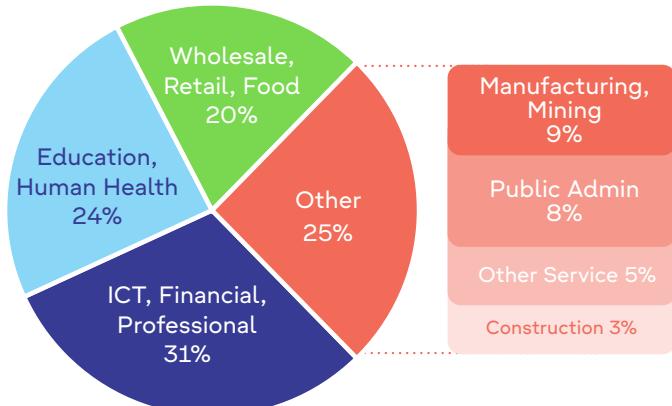
Of **136,318 Workers Resident** in South Dublin

### Where South Dublin's workforce lives

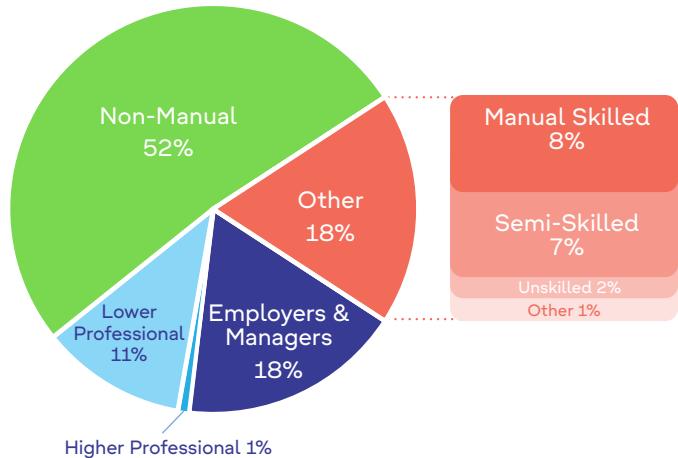


Of **104,232 Jobs** in South Dublin

### Industries of resident workers commuting externally



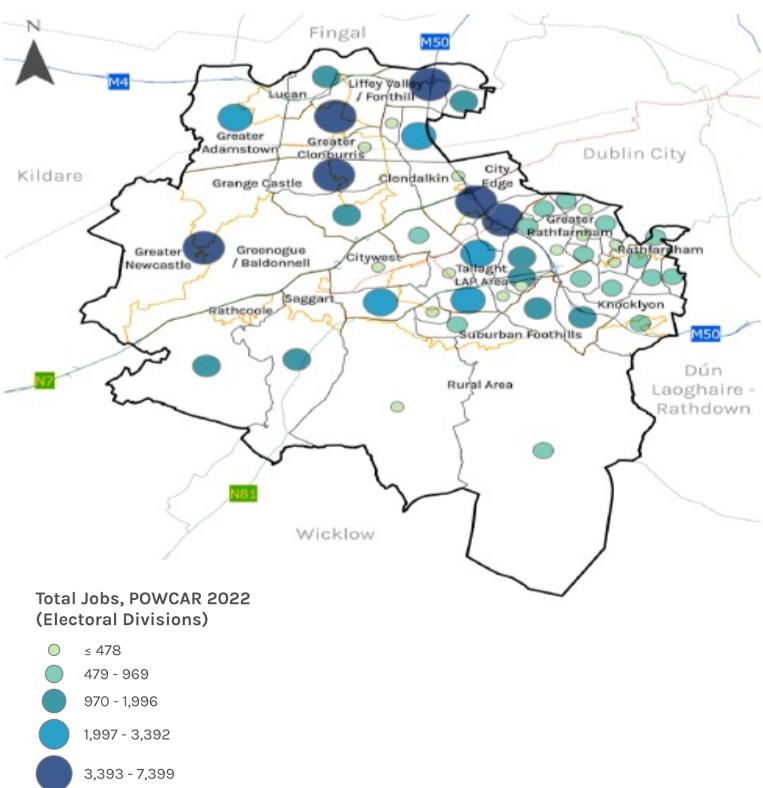
### Socio-economic groups of resident workers commuting externally



Of the 53,811 South Dublin residents who commute outside the area for work, 81.7% belong to higher socio economic groups, ranging from Non Manual to Employers Managers. This suggests that the people commuting out of South Dublin are relatively skilled and in higher value occupations.

\*This data was not provided or residents have no fixed workplace

## Employment density and commuting flows



Location	Number of Jobs	Percentage of Total Jobs
Tallaght LAP Area	22,138	21.2%
City Edge	17,345	16.6%
Citywest	10,482	10.1%
Liffey Valley / Fonthill	9,088	8.7%
Clondalkin	7,040	6.8%
Greenogue / Baldonnel	6,002	5.8%
Greater Rathfarnham	5,186	5.0%
Knocklyon	4,752	4.6%
Grange Castle	4,680	4.5%
Suburban Foothills	4,002	3.8%
Lucan	3,652	3.5%
Greater Adamstown	3,475	3.3%
Saggart	887	0.9%
Rathcoole	1,226	1.2%
Greater Clonburris	1,254	1.2%
Rathfarnham	1,277	1.2%
Greater Newcastle	787	0.8%
Rural Area	993	1.0%

## How SDCC will support its people

### Connected and Accessible Skills and Lifelong Learning

South Dublin has a rich network of FET and higher education providers and strong industry partnerships, however the system is fragmented and hard to navigate. In line with regional and national skills policy (Department of Education and Skills, Ireland's National Skills Strategy, 2025), the priority is to better map, align and connect existing provision to future sector needs, making lifelong learning more strategic, coherent and accessible.

### Accessible Employment Hubs

South Dublin is part of a strong and dynamic labour market, serving as both an origin and destination for workers across a diverse range of sectors, with high levels of commuting, particularly among highly skilled workers. Supporting the 10-minute settlement concept is a key priority, achieved by enhancing accessible employment hubs and diverse job clusters, integrated with sustainable transport and higher-density housing, to enable more local living, local working and a resilient economy.

### Growing Local Talent and Opportunity

The jobs profile in South Dublin generally reflects current skill sets, however high rates of outward commuting by leadership and professional talent highlight a need for more high-value local job progression opportunities. Addressing this requires increasing the number and variety of quality local jobs. There is also a need to enhance career ladders, support apprenticeships at entry level, and removing barriers to participation so residents can live and work in South Dublin. This is aligned with the “Opportunity for All” ambition of SDCC.

# Inclusive Skills and Employment Development

Foster a dynamic and inclusive skills and employment ecosystem across South Dublin that promotes lifelong learning, accessible local job opportunities, and clear progression pathways, ensuring residents can continuously upskill and thrive in a sustainable, connected, and future-ready economy.

Key ambitions		
	Lead partners	Priority
Develop a coordinated County Skills Strategy.	<i>TU Dublin, DDLETB, Dublin Skills Forum, SDCP, FET providers, LEO, South Dublin Chamber, LCDC</i>	High
Ensure lifelong learning and upskilling access.	<i>DDLETB, FET centres, TU Dublin, South Dublin Chamber</i>	Medium
Support the development and enhancement of accessible employment hubs.	<i>Business park owners, LEO, South Dublin Chamber, Enterprise Ireland, SDCP, LCDC, co-working hub owners</i>	High
Integrate sustainable transport and mobility solutions.	<i>NTA, major employers in key hubs, Smart Dublin, SDZ developers, South Dublin Chamber, LEO</i>	High
Drive job creation across skill levels.	<i>IDA, Enterprise Ireland, LEO, South Dublin Chamber, SDCP, LCDC</i>	Medium
Promote progression and mobility for all workers.	<i>DDLETB, TU Dublin, South Dublin Chamber, LEO, local employers.</i>	Medium
Foster diversity and social mobility in employment.	<i>Schools, youth agencies and advocacy groups, SDCP, LCDC, DDLETB.</i>	Medium

	How we're going to support this pillar - key actions (Led by SDCC with support from partners)	Timeframe
<b>Connected and Accessible Skills and Lifelong Learning</b>		
3.1.1	Development a Skills Strategy for the county in collaboration with key stakeholders.	Mid (1-2 years)
3.1.2	Assess the feasibility of developing a regional approach to skills development with key stakeholders.	Mid (1-2 years)
3.1.3	Explore the feasibility of providing sustainable travel hubs within the county to provide access to key employment hubs/nodes.	Mid (1-2 years) - Long (3-5 years)

## How we're going to support this pillar - key actions (Led by SDCC with support from partners)

		Timeframe
<b>Accessible Local Employment Hubs</b>		
3.2.1	Prioritise maximising employment density in employment hubs in proximity to high-density residential areas to support short, sustainable commutes and increase job accessibility for local residents, in line with 10-minute settlement concept.	Mid (1-2 years) - Long (3-5 years)
3.2.2	Provide a mix of co-working spaces, enterprise centres, and regeneration of vacant sites to create diverse job opportunities, especially for SMEs and new businesses.	Ongoing
3.2.3	Support the expansion of cycling infrastructure, pedestrian networks, and public transit connectivity to main employment hubs.	Long (3-5 years)
<b>Growing Local Talent and Opportunity</b> (SDCC will advance this area through partnership working)		
3.3.1	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.	Ongoing
3.3.2	Encourage development and promotion of career ladders, apprenticeships, and continuous professional development, in collaboration with social enterprises and community-led businesses, particularly for adults seeking to advance in current roles.	Ongoing
3.3.3	Collaborate with schools, youth agencies, and community groups to enable underrepresented and disadvantaged groups to access training, mentorship, and job opportunities, supporting targeted outreach, language training, accessible recruitment, and facilitating employer engagement.	Ongoing

## **Pillar 4: Place**

South Dublin County Council will 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 identity within the wider metropolitan area, and nationally.

## Pillar 4 Place Objectives



Create a more welcoming, attractive and people-centred environment in key towns and villages by delivering high-impact placemaking interventions, such as greening, public realm enhancements, activation of underused spaces and support for a vibrant evening economy.



Invest in the infrastructure, amenities and assets that enable sustainable growth in the visitor and student economies, including improved accommodation options, upgraded mobility networks, enhanced cultural and recreational facilities, and renewed town centre spaces.



Reposition South Dublin through a coordinated, insight-led place marketing and branding strategy that communicates its strengths, shifts perceptions, amplifies local stories, and more effectively attracts visitors, students, talent and investment.



Strengthen collaborative, cross-sector place management by establishing structures and partnerships including Business Improvement District (BIDs) and co-created local action groups.





In developing our place-based actions, South Dublin was benchmarked against other counties in Ireland using a wide array of data points which synthesised the performance and competitiveness of South Dublin as a place to Invest, Live, Visit and Study. The results from this analysis (indicated in the Vista Report carried out by Eutopia) highlighted that South Dublin is already highly competitive on a national level in terms of investment attraction and as a place to Live, however there are improvements to be made in terms of establishing South Dublin as a place to Study and Visit. Overall South Dublin ranks as the 9th most attractive County in Ireland from 26 Counties. The Tourism Strategy has already been developed by SDCC addressing many of the visitor attraction challenges and presents a clear plan of action for the County.

Place-based actions will play a critical role in shaping how South Dublin and the towns and villages within it are experienced, understood, and valued by residents, visitors, and investors. While the impact of placemaking and place marketing can be challenging to measure with precision, there is strong anecdotal and emerging evidence that such interventions deliver meaningful benefits, from enhancing community wellbeing and developing a stronger sense of belonging, to improving perceptions of safety, vitality, and opportunity.



# How SDCC will support its place

## Enhancing facilities and amenities in South Dublin

Placemaking in South Dublin has been ongoing however there is scope for improvement. Aligned with the broader Economic Strategy, there will be an ongoing programme to improve our public realm and the amenities within it, considering factors such as lighting, tactical greening and pocket parks, wayfinding, zoned seating and public art. These actions will stimulate usage, attractiveness and create a “sense of place” across our communities. Place development actions to shape our amenities and economy such as student accommodation and upgraded hotel accommodation will also be reviewed.

## Developing and communicating our value proposition

Place marketing and branding considerations include building a consistent narrative on South Dublin, developing compelling campaigns for South Dublin, promoting it as a great place to Live, Work, Study and Visit. SDCC is working with Fáilte Ireland and the other Dublin Local Authorities in support of the Visit Dublin and Dublin place brand programmes for visitor and investment attraction. There is also scope to extend usage of the SDCC brand and align it with local place branding efforts.

## Working together for success

Place partnerships such as Business Improvement Districts are currently absent in South Dublin and have proved to be very effective vehicles for day-to-day stewardship of local areas, aligning partners within South Dublin to activate spaces, enhancing safety and experience, establishing and promoting festivals, supporting the evening economy and driving continuous improvement so South Dublin’s towns and villages remain vibrant, welcoming and economically resilient.

### Key ambitions

	Lead partners	Priority
Support public realm and facility improvements aligned with Space recommendations to enhance public realm, public space usage and overall place attractiveness.	<i>Department of Housing, Local Government &amp; Heritage, Department of Enterprise, Tourism and Employment, OPW, local business parks, Tidy Towns, local community organisations, TII, NTA</i>	<b>Medium</b>
Support a strong talent pipeline, community mix and vibrancy through attracting students and young professionals.	<i>TU Dublin, private sector developers, TUH</i>	<b>High</b>
Promote and develop alternatives to tackle car dependent culture for work and access to leisure services.	<i>TII, NTA, Dublin Bus</i>	<b>Medium</b>
Develop a clear identity for South Dublin expanding on SDCC’s organisational brand.	<i>Dublin region place brand team, Visit Dublin</i>	<b>Low</b>
Investigate the opportunity for place partnership development to encourage co-creation with businesses and community in placemaking actions.	<i>Retail park owners, South Dublin Chamber, employers in key (pilot) towns and villages</i>	<b>Low</b>

## How we're going to support this pillar - key actions (Led by SDCC with support from partners)

### Timeframe

#### Enhancing facilities and amenities in South Dublin

4.1.1	Conduct a feasibility study to determine the need for new student developments close to transport links.	Mid (1-2 years) - Long (3-5 years)
4.1.2	Support a balanced approach to car parking in key areas to facilitate placemaking opportunities and reduce car parking in prime areas to enable development of public spaces for leisure and culture.	Ongoing
4.1.3	Explore the feasibility of providing additional sports facilities in the County including an integrated sports hub for developing sports.	Short (6-12 months)
4.1.4	Support the repurposing of vacant retail units for pop-up events, community spaces and shops.	Ongoing
4.1.5	Support a sustainable and thriving business environment by investing in key Business Improvement Areas throughout the County	Mid (1-2 years)

#### Developing and communicating our value proposition

4.2.1	Explore opportunities to develop and connect a place brand based on SDCC's new organisational brand. Partner with other Dublin local authorities to co-create a distinctive and compelling place brand.	Short (6-12 months)
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#### Working together for success

4.3.1	Pilot a Business Improvement District for focused town and village centre regeneration.	Mid (1-2 years) - Long (3-5 years)
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# KPIs, Monitoring and Evaluation

In order for the Economic Strategy to be successful, it is important to implement clear performance metrics, in line with overarching strategic goals, and implement a framework through which successful implementation and impact can be measured. The section below outlines key KPIs to show successful implementation across strategy areas.

# 1. KPIs for Economic Strategy

The overarching KPIs of this economic strategy are:

- Creation of 1,500 new jobs per annum
- Increase economic output of the county

As a wider economic target, considering a baseline of €22.61bn as South Dublin's GVA in 2022 (based on latest available CSO GVA per employee/sector calculations, and South Dublin employment), the below establishes growth scenarios for a conservative, level and ambitious uplift in GVA over the 5-year implementation of the economic strategy.

Scenario	Growth	2030 GVA	Notes
Steady development	15%	€26.0bn	Reflects achievable growth under existing economic policies and continued sectoral support. Implied ~2.8% average growth per annum from 2022 baseline, in line with ESRI and Central Bank GDP growth projections.
Enhanced growth	20%	€27.13bn	Achievable through effective strategy implementation with proactive initiatives to support enterprise, productivity improvements, and selective investment in key sectors.
Impact growth	25%	€28.27bn	In line with full implementation of high-impact strategic initiatives, and their impact on activation of transformative projects (City Edge, Grange Castle, Tallaght LAP).

However, South Dublin County Council's Economic Strategy has broader goals than pure GVA growth including wider qualitative aims of providing opportunity for all, optimised use of finite space and creating a vibrant place in South Dublin. As such, individual KPIs per chapter support South Dublin County Council to achieve their objectives and ensure accountability for measured improvements in South Dublin's economy.

The KPIs in this Strategy have been developed as a metric for measuring success against the county's broader objectives based on existing policy objectives and historic data trends in South Dublin, using official data sources, leading to a set of targets that are both achievable and action-oriented. These targets are expected to be achievable provided the outlined actions for each pillar are successfully implemented. It is important to note that some KPIs will result from multiple, interconnected actions working together to drive growth and prosperity.

## Sectors KPIs

The sectors section of this Economic Strategy is focused on economic improvement through a sectoral lens. As such, this section focuses on improvements to the economic output of South Dublin through targeted steps to support, grow and develop sectors identified as having the strongest impact on South Dublin's economic goals, be that GVA, salaries, job creation, research and innovation, FDI or export.

### Quantitative KPIs

Measure	KPI metric	Source	Baseline	Target 2030	Uplift
Job creation	Number of FTE jobs in county	POWSCAR report	104,232 (2022)	116,232 (total)	+1500 per year
Enterprise support ecosystem	Number of LEO clients	LEO Impact Report	275 (2023)	325 (annual)	25%
Enterprise support ecosystem	Jobs supported by LEO	Corporate Plan Progress Report	51 (2024)	62 (annual)	50%
Enterprise support ecosystem	LEO mentoring participants, across programmes	Corporate Plan Progress Report	675 (2024)	760 (annual)	25%
Enterprise support ecosystem	Work IQ business occupancy	Work IQ Client Review	39% (June 2025)	95% (total)	35%
FDI Attractiveness	Number of FDI projects	Monitoring framework	New 2025	25 (cumulative)	Averaging 5 per year
FDI Attractiveness	FDI job creation	Monitoring framework	New 2025	750 (cumulative)	Averaging 30 per project
Export growth	Export leadership programme	Corporate Plan Progress Report	15	20 (annual)	30%
Research and Innovation	New R&D enterprises	Monitoring framework	New 2025	10 (total established)	Averaging 2 per year
Research and Innovation	Number of GovTech/ClimaTech pilot programmes launched	Monitoring framework	New 2025	10 (total)	Averaging 2 per year
Events and promotion	Sector and tourism events supported	Corporate Plan Progress Report	13 (2024)	18 (per year)	40%
Enterprise hubs	Number of enterprise and innovation hubs	LEO Enterprise Hubs Report	12 (2022)	20 (total)	60%

### Qualitative KPIs

Measure	Metrics	Completion
Research and Innovation	Development of testbed function for Tech for People and Place through SDCC initiatives	Testbed facilities established by 2027
Research and Innovation	Feasibility study for wet labs completed	Study completion by year end 2028
Support sectors to thrive	Feasibility studies for Creative and media	Study completion by year end 2027

## Space KPIs

The space chapter of this economic strategy is focused on optimising the use of South Dublin's land and facilitating cluster development and company co-location to foster and develop an innovative and diverse economy.

### Quantitative KPIs

Measure	KPI metric	Source	Baseline	Target 2030	Uplift
Employment density optimisation	Jobs per hectare in employment hubs	County Development Plan	51	60+	18%
Employment hub occupancy	Commercial occupancy rate in employment hubs	GeoDirectory Vacancy	2%	1%	50%
Transport connectivity	% of public and active transport in employment hub mix	POWSCAR report	17.80%	30%	12.2%

### Qualitative KPIs

Measure	Metrics	Completion
Strategic planning	Employment land review as part of CDP process	Coincide with the review of the CDP
Infrastructure development	Transport connectivity improvements	Connectivity projects initiated by 2027
Cluster development	Clusters formally recognised and strategic partnerships for cluster development established	Coincide with CDP review

## People KPIs

The people section of this Economic Strategy is focused on ensuring residents and workers of South Dublin have equal opportunities and equal and sustainable access to employment and skills development pathways.

### Quantitative KPIs

Measure	KPI metric	Source	Baseline	Target 2030	Uplift
Increased educational attainment	% of population completed level 6+ education	CSO data from SDCC	44.1% (2022)	52%	8%
Reduced unemployment	Unemployment rate in labour force	CSO data from SDCC	5.5% (2022)	4%	-1.5%
Employment accessibility	Percentage working in county of residence	POWSCAR Report	39.5% (2022)	45%	+5.5%
Skills development capacity	Annual participants in skills training programmes	New with skills strategy implementation			
Training effectiveness	Training programme completion rate	New with skills strategy implementation			

### Qualitative KPIs

Measure	Metrics	Completion
Skills development	Skills mapping exercise completed	Year end 2027
Skills development	Skills Strategy developed and implemented	Year end 2027
Skills development	Apprenticeship programmes established	5 new programmes by year end 2029

## Place KPIs

The place chapter of this economic strategy is focused on ensuring South Dublin is an attractive place to invest, live, study and visit.

### Quantitative KPIs

Measure	KPI metric	Source	Baseline	Target 2030	Uplift
Tourism development	Annual visitor numbers to major attractions	Failte Ireland	271774 (2022)	339717	25%
Tourism development	Hotel room accommodation	Tourism strategy	2208 (2023)	2350	17%
Transport connectivity	Public transport modal share to employment areas	POWSCAR Report	9.30%	18%	8.7%
Business environment	Conference capacity	Tourism Strategy	23309 (2022)	24500	26%
Business environment	Business satisfaction index	South Dublin Chamber	Monitoring framework	New 2025	New 2025

### Qualitative KPIs

Measure	Metrics	Completion
Place marketing	Dublin Regional place brand campaigns	Brand strategy launched by 2026
Place management	Place partnerships established	4 formal partnerships by Q4 2026
Place to study	Feasibility study for student accommodation completed	Completed by end of 2028

## 2. Monitoring and Evaluation Framework

In line with monitoring KPI targets and strategy implementation a robust monitoring and evaluation process is essential to ensure the South Dublin Economic Strategy delivers measurable impact, remains aligned with its vision, and adapts responsively to changing conditions. This framework should enable strategic partners, stakeholders, and the Economic Strategic Policy Committee (SPC) of SDCC to assess progress, evaluate new initiatives, and maintain accountability. By linking quarterly reviews, targeted indicators, and data-driven decision-making, this approach supports a culture of active collaboration, transparency, and improvement across all workstreams.

### i. Monitoring and Governance

- **Oversight Body:** The Economic SPC will act as the primary oversight body.
- **Annual Review:** An annual review will collate KPI performance, implementation milestones, and qualitative outcomes, to be published as part of the Council's progress reporting.

### ii. Monitoring and Success

In addition to the KPI monitoring sources listed in the KPI and metrics section, SDCC will look to implement the below monitoring pathways to strengthen the data available to measure impact and successful economic growth and development:

- **Annual business survey:** Engage in annual business survey crafted with South Dublin Chamber to understand employment growth and progress more accurately against targets, and business satisfaction.
- **FDI tracker:** Seek to explore the feasibility FDI project tracker in line with planning applications to track foreign direct investment numbers in the county, by project, job creation and capex to enable clearer understanding of FDI economic impact.
- **Skills Strategy metrics:** In line with implementation of a Skills Strategy, key metrics should be established across FET providers, TU Dublin and DDLETB in collaboration with the Dublin Skills Forum to track training programme uptake and effectiveness in targeting various communities.

### iii. Evaluation

Strategy implementation will be reviewed according to the below milestones

- **Annual Monitoring:**
  - Monitor progress against estimated timelines for completion
- **Mid-term Review (2027/28):** Independent review of KPI progress, stakeholder engagement, and Strategy alignment with changing policy or economic conditions.
- **End-of-cycle evaluation (2030):** Comprehensive assessment of impact, identifying successes, gaps, and recommendations for the next strategic cycle.