

FRAMING A PLACE BASED INVESTMENT STRATEGY FOR FERMANAGH & OMAGH

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1. Introduction

To lift places up in terms of better living standards, higher productivity is required from all resources invested in at the local level. Investments need to work together to create better outcomes. A broad-based investment strategy at a local level is therefore important. It especially requires a focus on measuring, tracking, monitoring and evaluating the creation of “capitals” at a local level, and improve our understanding on how those capitals are connected. The capitals framework was set out in the White Paper on Levelling Up from the Department of Levelling Up Housing and Communities (DLUHC, 2022) by the former UK Government.¹

The DLUHC (2022) white paper included six capitals which are human, financial, social, physical, intangible and institutional capital. We analyse these capitals in Fermanagh and Omagh District Council area and add “natural” capital (the investment which supports environmental conservation, access to green space, and contribute to net-zero targets by reducing greenhouse gas emissions). These capitals must be used as productively as possible, given the scarcity of resources and the urgent need to improve outcomes and reduce regional inequalities.

What does productivity for place mean?

Productivity is a positive notion which allows societies, people and firms to “do things better” by creating proportionally more value relative to the amount of resources being used (The Productivity Institute, 2024). Labour productivity is the output that each worker produces per hour. Places that are able to raise their worker productivity can generate higher standards of living and wellbeing. Productivity is associated with technological change and innovation, based on joined up value creating activities. It also requires investment in places, people, digital capabilities and organisational knowledge. However, productivity is also a result of how well organised a place is in terms of institutions, decision-making processes, and community involvement. The promotion of productivity therefore requires a solid understanding of how the assets interact to create productivity.²

Productive places are also adaptable, and adaptability is important for economic resilience. Places where productivity is growing are also places where people or firms are able to find and seize new opportunities. These new opportunities can come from major technological developments, the opening of new markets, or a shift in the skills base in the workforce. This adaptability allows the place to continually find better growth pathways, and move on from previous sectors that are losing their competitive strength (Boschma, 2015).

Productivity is particularly important for dealing with the aging population in Fermanagh and Omagh. Greater levels of productivity will mean that government has more resources to provide the public services that are needed. The strong labour market that is associated with productivity growth will also ensure that young people have opportunities within the district, and so are less inclined to leave to work elsewhere.

¹ The Labour party won the UK General Election on 4th July 2024 and renamed DLUHC as the Ministry for Housing and Local Government. In the Labour Manifesto (2024) the Government pledged it would work with the Northern Ireland Executive and Assembly to improve public services and generate economic growth. Labour also embarked on a new Industrial Strategy along with greater devolution of power to English authorities and a proposed Council for Regions and Nations.

² For a blueprint on boosting UK’s productivity see the Productivity Agenda, Coyle, et al (2023) and TPI (2024).

Outline of the report

In this report we present our findings from the Investment in Productive Places project in Fermanagh and Omagh District Council area³. We discuss how a strategy for investment can help productivity to grow in places that have potential to improve. To improve our understanding on the hard-to-measure elements of the capital's framework and how they are applied in practice, we use a mixed methods approach combining data analysis with qualitative insights. In addition to gaining insights into how the capitals are understood across a range of stakeholders, we also look at the interdependencies across the capitals. Our indicative findings reflect the experience of participants from Fermanagh and Omagh in workshops and interviews.

This report is structured as follows. In section two we discuss the UK and Northern Ireland policy context, local strategies and investment plans, economic performance and industrial diversity. We compare Fermanagh and Omagh's performance with the two other local government districts: Mid Ulster and Armagh City, Banbridge and Craigavon. Along with Fermanagh and Omagh these districts make up the Mid South West (MSW) Economic Engine⁴ in Northern Ireland. Section three presents variables for the capital assets in the Fermanagh and Omagh council area. The fourth section provides the qualitative analysis insights. The final section discusses recommendations for a broad-based investment strategy to lead to improvements for Fermanagh and Omagh's productivity.

2. The Policy Context

It is well established that the UK is one of the most interregional unequal countries in the industrialized world (see McCann, 2020). Although the UK is world leading across a range of sectors and with many places exhibiting high levels of productivity, innovation and good jobs, this is still overly concentrated in specific areas and the long tail of low-productivity areas is a prevalent issue to address. This not only matters for the lived experiences of citizens, such as the quality of life for individuals and families, but also for the growth rate of the economy and the levels of development and productivity achieved by businesses and organisations that in turn support the level of goods and services that the public benefit from.

The former Government's Levelling Up White Paper (DLUHC, 2022) recognised that reducing spatial disparities would require an understanding of a number of interdependent factors and identified six drivers to address this. These are referred to as capitals, detailed further in section three of this report. The six capitals are:

- Physical capital – infrastructure, machines and housing.
- Human capital – the skills, health and experience of the workforce.
- Intangible capital – innovation, ideas and patents.
- Financial capital – resources supporting the financing of companies.
- Social capital – the strength of communities, relationships and trust.

³ The Productivity Institute started working with Fermanagh-Omagh District Council in November 2023, following a pilot study in Rochdale, Greater Manchester. To read more about the Investment in Productive Places Campaign (IPPC) see: <https://www.productivity.ac.uk/research/projects/investment-in-places/>.

⁴ For more information on the Mid South West Economic Engine (MSW) see the Regional Economic Strategy 2020: <https://midsouthwestregion.org/>

- Institutional capital – local leadership, capacity and capability.

In our research we add to this list natural capital, this refers to a place's stock of natural resources and ecosystems that provide a wide range of valuable services and products for humanity. In the appendix of this report we include details of the experimental data tool for LGDs in Northern Ireland that include variables for human, social, financial, physical and natural capitals.

In 2022, Jordan and Turner published a data assessment of productivity in Northern Ireland, showing levels and growth over time compared to the UK, as well as a discussion of the drivers of productivity. The Productivity Institute's Productivity Lab (Garcia et al, 2024) has produced further scorecards and dashboards for the drivers of productivity for Northern Ireland and for the Local Government Districts (LGD are ITL3 sub-regions). In the Executive Report, we include a scorecard for the drivers of productivity for Fermanagh and Omagh compared to Northern Ireland. The drivers of productivity in Northern Ireland are discussed by Donaldson et al. (2025), which contributes to understanding of the capitals concept we employ for this report. The report identifies the primary stakeholders of the productivity drivers and maps those onto the capitals (see Table 1). The table also shows how the components of the growth missions, as outlined in the HM Government (2024) Plan for Change, link to the capitals and drivers of productivity (with the exception of health and wellbeing that links into the mission to building an NHS fit for future).

Table 1: Drivers of Productivity, Stakeholders, Capitals and Growth Missions

Drivers of Productivity	Primary Stakeholders	Capitals	Growth Mission
Business performance & characteristics	Firms	Intangible Financial Social	Industrial strategy & trade + Innovation
Skills & training	Individuals in the workforce	Human	People: more people into good jobs
Policy & institutions	Government	Institutional Social	Place: devolution & reform
Health & wellbeing	Individuals in society	Human Social	Build an NHS fit for the future
Investment, infrastructure & connectivity	Business environment	Physical Natural	Investment, infrastructure & planning + Net Zero

Source: Donaldson et al (2025) Table A9.2 and HM Government (2024) Plan for Change.

A couple of policy events of specific importance for Northern Ireland should be mentioned. First, the Windsor Framework that was agreed in 2022 to protect the UK internal market in terms of trade relations for Northern Ireland and provide new opportunities for inward investment, was noted in the Government's Manifesto in 2024. Second, the UK Government established the Council for Nations and Regions that met for the first time in October 2024⁵.

⁵ See <https://www.executiveoffice-ni.gov.uk/news/ministers-attend-first-meeting-council-nations-and-regions>

During the same month, the Government's Autumn Budget stated that additional £1.5bn was committed to the Northern Ireland Executive for investment in schools, housing, health and social care and transport (HM Treasury, 2024). The Government also confirmed funding for the Mid South West (MSW) growth deal, this comprises a commitment of £126 million each from the Northern Ireland Executive and UK Government, enhanced by an additional £18.5 million in government funding from the Executive. The 15-year plan focuses on four themes, which are: future-proofing skills; enhancing infrastructure; boosting innovation and digital and growing the visitor economy.

Northern Ireland Policy Context

The devolved government in Northern Ireland, the Northern Ireland Executive, was formed after the Good Friday agreement in 1998 and meets at Stormont. The UK Government remains responsible for national policy on all matters that have not been devolved, including foreign affairs, defence, social security, macro-economic management and trade. The UK Government's Secretary of State for Northern Ireland is in charge of the Northern Ireland Office which is responsible for overseeing the Northern Ireland devolution settlement. It also represents Northern Ireland interests at UK Government level and UK Government interests in Northern Ireland.

The Assembly is the cornerstone of the devolved Northern Ireland government. It is where political representatives debate and pass laws on important issues that affect everyone in Northern Ireland. The Northern Ireland Executive committee runs the devolved government in Northern Ireland on behalf of the Assembly⁶.

The Northern Ireland Assembly has responsibility for the majority of public services in Northern Ireland including: agriculture and environment, economic policy (including employment and skills programmes), education, roads, passenger transport, health and social care, housing, libraries, drainage and waste water, fire services, rate collection, trading standards, street lighting, rural affairs, urban regeneration and regional planning with oversight of local planning. These services are managed by the nine Northern Ireland Executive Departments. Local Government in Northern Ireland is made up of 11 district councils, run by elected councillors.

Important trade initiatives include Peaceplus⁷ and the Shared Island agreement. Peaceplus is a cross-border funding programme supported by the European Union, the Government of the United Kingdom of Great Britain and Northern Ireland, the Government of Ireland, and the Northern Ireland administration. The Peaceplus programme is managed by the Special EU Programmes Body (SEUPB). SEUPB is one of six North South Bodies established on 8 March 1999 as a consequence of the Belfast/Good Friday Agreement. The Shared Island initiative is a joint agreement between the Irish and UK government for funding across the island of Ireland. Funding was agreed in early 2024 for the A5 road improvements that will go around Omagh and improve the North-West transport corridor⁸.

⁶ For more information see: <https://www.nidirect.gov.uk/articles/overview-government-northern-ireland>

⁷ See <https://www.seupb.eu/peaceplus>

⁸ See <https://www.bbc.co.uk/news/articles/cg3ex8e26xxo>

The Department for the Economy (2024) has set out their vision for future economic development in the Minister's Economic Vision and Sub-regional Economic Plan. The four objectives of the Economic Vision are: 1) increased productivity; 2) more good jobs; 3) regional balance; and 4) decarbonisation. This strategic initiative aims at driving local economic growth through three key delivery strands: the creation of Local Economic Partnerships, the enhancement of Invest NI at a regional level, and the realignment of departmental policies and programmes to support economic development. The strategy encourages partnership working between central government, Invest NI, Councils, and the network of education providers and civic society. The aim is to identify the main barriers to economic development, and the interventions that will unlock the area's potential. Invest NI's Our Future in Focus Strategy 2024-2027 provides a clear direction for Invest NI aligned to the Ministers Economic Vision and the Sub Regional Economic Plan.

Fermanagh and Omagh District Council

Fermanagh and Omagh District Council (FODC) was established on 1st April 2015⁹. FODC covers a land area of 2,829 square kilometers which represents approximately 20% of the total land mass of Northern Ireland. It is located in the southwest of Northern Ireland, covering all of County Fermanagh and parts of County Tyrone. It borders counties Donegal, Leitrim, Cavan and Monaghan in the Republic of Ireland. The district consists of two main towns; namely Enniskillen and Omagh.

Councils in Northern Ireland have responsibility for approximately one-sixth of the powers and spending than councils in Wales and Scotland¹⁰. The critical statutory services provided by the council are waste management and recycling (the largest part of the budget) and local planning. Further regulatory functions of FODC include: the registration of births, deaths, marriages and civil partnerships, building control, environmental health and licensing. FODC also delivers further public services including street cleansing, recreation, sport and leisure services, culture and arts facilities and events, tourism and local economic development, as well as community and good relations support. Councils in NI are also responsible for 'initiating, maintaining, facilitating, and participating in' Community Planning, a process by which organisations who provide public services, businesses and voluntary groups and local communities work together to improve people's lives.

The district is the largest, geographically, of the 11 Council areas but it has the smallest population with 116,900 people¹¹ in 2021 (6% share of the population of Northern Ireland which was 1,904,564 in NISRA Census, 2021). As a result, the population density of approximately 41 people per km² is the sparsest in NI, compared to 141 people per km² in the whole of Northern Ireland. The district has experienced 10.6% population growth between 2001 and 2022 (compared to 13.1% in Northern Ireland).¹² The Fermanagh and Omagh

⁹ See FODC web-site: <https://www.fermanaghomagh.com/your-council/about-the-council/>.

¹⁰ See the Local Government Information Unit: <https://lgiu.org/local-government-facts-and-figures-northern-ireland/>.

¹¹ NISRA is the Northern Ireland Statistical and Research Agency. Population estimates are here: <https://www.nisra.gov.uk/publications/2023-mid-year-population-estimates-northern-ireland>

¹² The age profile of the district is distributed as follows: 21% aged 0-15 years (compared to 20% in Northern Ireland as a whole), 27% aged 16-39 years (30% in NI), 33% aged 40-64 years (32% in NI) and 19% aged 65 years and over (18% of NI).

population share of older adults (aged 65+) has risen from 13% share of the population in 2001 to 19% in 2022. The working age ratio is the share of working age population (aged 16-64) divided by total population. This was 62.6% in 2001 (compared to 63.2% in Northern Ireland) but had fallen to 59.9% by 2022 (compared to 62.1% in NI). The evidence of a growing aging population in FODC is in part countered by a larger share of under 16 year olds compared to the Northern Ireland average.

Fermanagh and Omagh District Council Strategies and Investment Plans

The plans and strategies for Fermanagh and Omagh do not exist in isolation; they are designed within a wider framework of regional and local strategies to ensure a cohesive and strategic approach to development and governance. At the regional level, the NI Executive agreed the Programme for Government 2024-2027 'Our Plan: Doing What Matters Most'¹³ in February 2025. This provides the overarching direction, setting priorities that guide local policies and initiatives. At the local level, key plans such as the Fermanagh and Omagh Community Plan, Corporate Plan, Local Development Plan, and Performance Improvement Plan work together to drive sustainable progress in the district.

The Local Development Plan establishes policies within the Plan Strategy which aims to create high-quality, well-connected places, supporting the Council's commitment to achieving a Net Zero District by 2040. This includes measures to address climate change through sustainable transport, energy-efficient buildings, and improved drainage systems. Meanwhile, the Fermanagh and Omagh Community Plan serves as the district's long-term strategy, bringing together public, private, and community/voluntary partners to work towards a shared vision. The Council leads the partnership structure that delivers this plan, which should support a collaborative approach to community and economic development.

Aligned with the Community Plan, the Council's Corporate Plan, 'Our Council, Our Plan 2024-2028'¹⁴, sets the strategic direction for the next four years. It establishes four key priorities: 1) Climate Action, focusing on sustainability and Net Zero by 2040; 2) People and Communities, ensuring opportunities for all to live well; 3) Shared Prosperity, fostering an inclusive and thriving economy; and 4) One Council, emphasising efficient governance and service delivery. Fermanagh and Omagh state that these strategies will form a comprehensive framework so the district can adapt to future challenges in a sustainable and inclusive way.

Fermanagh and Omagh District Council published an Inclusive Economy Action Plan (IEAP) 2024-2029. The IEAP has ambitions to drive an inclusive economy and to aid prosperity across the district noting: "By 2029 we will have a more inclusive, greener and more prosperous economy that benefits people, businesses and places across our district". Three strategic themes have been developed to drive forward this agenda, these are:

1. **Driving sustainable growth and innovation:** fully leveraging the MSW growth deal, FODC will support business growth (particularly to increase productivity and innovation), accelerate the transition to net zero and build greater social value.

¹³ <https://www.executiveoffice-ni.gov.uk/news/executive-agrees-programme-government>

¹⁴ <https://www.fermanaghomagh.com/app/uploads/2024/07/FODC-Corporate-Plan-2024-28.pdf>

2. **Building a place for sustainable business:** FODC will campaign for critical infrastructure investment, create capacity (industrial land and enterprise space), support sustainable development in the region (including town and community renewal) and promote Fermanagh and Omagh as a great place for business and as a living/ working location.
3. **Developing an inclusive skilled workforce:** promoting an industry led skills agenda (supporting inclusive skills development), foster greater diversity in the workplace, develop world-class strategic leadership and address the district's emerging skills gap.

The Mid South West (MSW) Region Growth Deal reached a significant milestone on 6th November 2024, with the signing of the Heads of Terms by representatives from the UK Government, Northern Ireland Executive, and three participating Councils. This sets the framework for delivering transformative projects in infrastructure, regeneration, tourism, innovation, and digital sectors, aligned with the Mid South West Regional Economic Strategy.

Key MSW projects in Fermanagh and Omagh include the A4 Enniskillen Southern Bypass, the Cuilcagh Lakelands Landscape Project, and redevelopment of the Ulster American Folk Park. Business-focused initiatives include the Green Hydrogen Distribution Network, the Concrete Sustainability Innovation Centre, and the Green Industrial Challenge Fund, fostering innovation and reducing carbon emissions. Further supporting sustainability, the Driving Net Zero Transformation Programme (funded by Innovate UK's Fast Followers programme) which helps local businesses transition to sustainable practices. The MSW region shares in £6 million to support this goal, with sustainability consultancy Carbonfit providing tailored carbon reduction strategies. This comprehensive investment package aims to enhance regional productivity, drive innovation, and contribute to Net Zero objectives, securing long-term economic and environmental benefits.

The Visitor Experience Development Plan (VEDP)¹⁵ for Fermanagh Lakelands and Omagh and the Sperrins is a 10-year roadmap for tourism in the area. The VEDP was developed with input from the public, private and community sectors and is jointly funded and developed by Fermanagh and Omagh District Council, Tourism NI and Waterways Ireland. The VEDP recognises the tourism potential of the area and aims to reposition the Fermanagh Lakelands and Omagh and the Sperrins as world class sustainable and regenerative tourism propositions. The aim is that visitors experience its rich natural and cultural heritage, to the benefit of local communities, businesses and the environment.

The ongoing development of the Strule Shared Education Campus is an education facility on the site of the former Lisanelly Army Barracks in Omagh. It brings together pupils from both main traditions, representing the controlled, maintained, and voluntary school sectors. The six schools involved are Arvalee School & Resource Centre (opened in 2016), Christian Brothers Grammar School, Loreto Grammar School, Omagh Academy Grammar School, Omagh High School, and Sacred Heart College, with the remaining schools set to open in September 2028. Each school retains its own identity and ethos while benefiting from shared resources and collaboration, offering students a wider range of subjects and access to

¹⁵ <https://www.fermanaghomagh.com/services/tourism/visitor-experience-development-plan/>

modern, flexible facilities. The campus also enhances links between mainstream and special needs education, supporting inclusive learning.

The UK Government¹⁶ have invested over £4 million from the Levelling Up Fund into a derelict former health centre in Omagh. It has been redeveloped into a co-working Digi-Hub space for businesses and entrepreneurs and has opened in 2025¹⁷. The Hub will provide more opportunities for local people and encourage people from outside of Omagh to work in the town centre. This high quality provision provides a viable alternative for local residents to be part of a thriving business community outside of Belfast.

Productivity and Economic Performance

Table 2 presents productivity levels (productivity is Gross Value Added, GVA, per hour¹⁸) and a range of economic performance indicators for the Mid South West (MSW) Economic Engine districts of Fermanagh and Omagh District Council (FODC), Mid Ulster District Council (MUDC) and Armagh City, Banbridge and Craigavon District Council (ABCD).

Mid Ulster has higher productivity at £38.40 compared to Fermanagh and Omagh of £36.70 in 2022. Armagh City, Banbridge & Craigavon has a highest residential weekly wage at £518.50 in 2023 (compared to £495 in FODC and £510.80 in MUDC). MUDC has the highest job density figure with 0.75 jobs for each resident aged 16-64 compared to 0.71 in FODC. In 2022 the FODC employment rates was 73.3%, falling to 70.6% in 2023. The Fermanagh and Omagh employment rate dropped below the NI average in 2023. The employment rate is above the NI average in the other two districts. The inactivity rate is above the NI and UK rates at 26% in FODC. The level of Gross Disposable Household Income (GDHI) is lower in FO at £18,127 per head compared to £18,468 in MU in 2022.

According to the Enterprise section of NISRA's Local Labour Market Insight's Dashboard, FODC accounts for 11% of all registered businesses (8715 in 2024) in Northern Ireland with 0.07 businesses per capita compared to 0.04 in NI. The share of firms with sole owners and no employees is 46.1% (4015 firms, much higher than the 27.7% share in NI). Then the share of micro firms is 47.8% (3990 firms employing between 1-9 people, compared to 61.6% in NI); the share of small business is 5.1% (445 firms employing 10 to 49 people, compared to 8.6% in NI); with 0.8% share of medium-sized business (70 firms employing 50 to 249 people, compared to 1.7% in NI) and approximately 10 large companies (employing over 250 people).

¹⁶ See <https://www.gov.uk/government/case-studies/over-4-million-for-new-enterprise-and-innovation-hub-in-omagh>

¹⁷ <https://omaghenterprise.co.uk/digi-hub/>

¹⁸ The ONS (2024i) state that output per hour is the preferred measure of labour productivity as it accounts for differences in working patterns. The ONS (2023a) first released output per hour for Northern Ireland Councils in June 2023. The ONS notes that Northern Ireland hours data are calculated using the Annual Survey of Hours and Earnings (ASHE) survey. Earlier ONS sub-regional productivity releases only reported output per job for councils. ONS (2024i) state that a "job" refers to a specific position of employment, which could be full-time or part-time. If a single worker holds multiple jobs, each of those positions is counted separately.

Table 2: MSW districts and Northern Ireland Economic Performance

Indicator	Year	Fermanagh and Omagh District Council	Mid Ulster District Council	Armagh City, Banbridge & Craigavon District Council	Northern Ireland	UK
Productivity (GVA/hour)	2022	£36.70	£38.40	£30.50	£34.70	£39.70
Population (Census)	2021	116,900	150,600	219,100	1,903,175	67,026,292
Gross med. Weekly full-time pay (resident)	2023	£495.00	£510.80	£518.50	£533.00	£574.90
Employment rate (16-64)	2023	70.6%	74.9%	76.6%	73.6%	75.4%
Unemployed (16-64)	2022	2%	1.4%	2.8%	2.3%	4.1%
Claimant Count (16-64)	2023	2.5%	2.2%	2.7%	3.1%	3.7%
Inactivity rate (16-64)	2023	26%	23.3%	20.9%	24.7%	21.8%
GDHI (per head)	2022	£18,127	£18,468	£18,389	£18,685	£22,789
Job Density	2021	0.71	0.75	0.65	0.75	0.85
Businesses [per capita]	2023	8,575 [0.07]	9,540 [0.06]	9,390 [0.04]	79,235 [0.04]	2,714,340 [0.04]

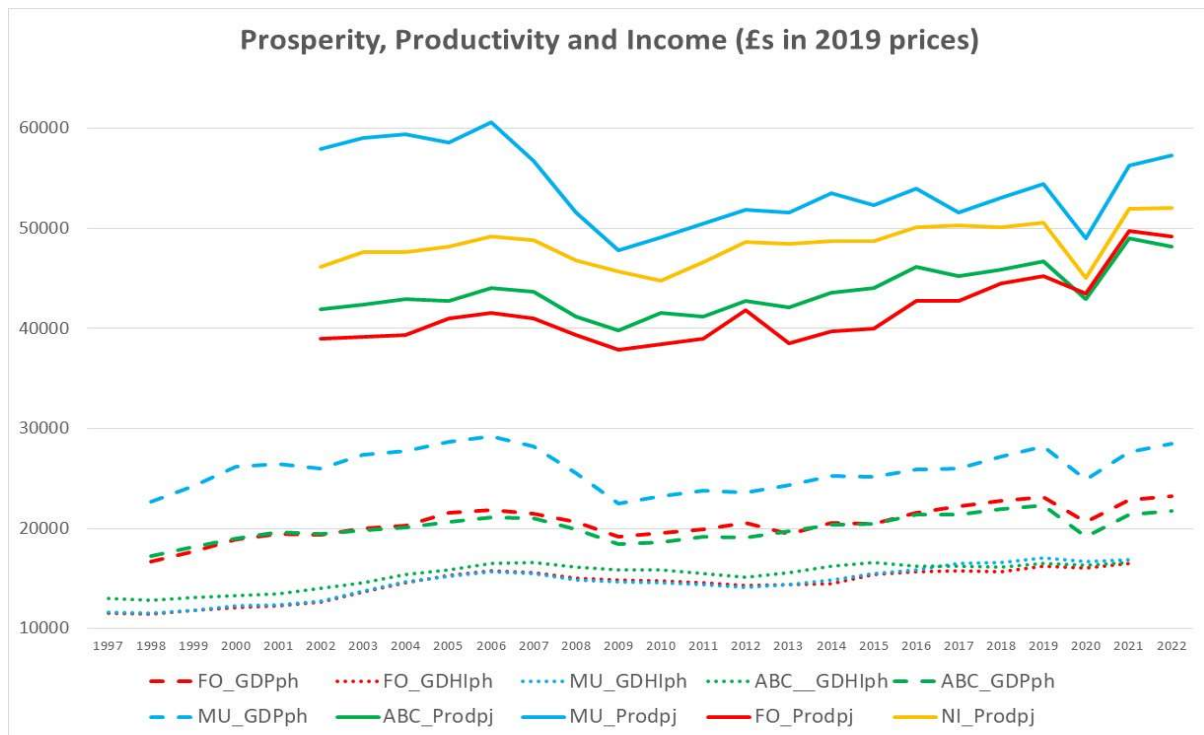
Sources: NISRA Local Labour Market Dashboard <https://www.communities-ni.gov.uk/publications/northern-ireland-local-labour-market-insight-dashboard> NISRA Census: <https://www.nisra.gov.uk/statistics/census/2021-census>

Figure 1 compares MSW district's income, productivity and prosperity over time. Prosperity is measured by Gross Domestic Product¹⁹ per head and productivity by Gross Value Added per filled job. We also analyse business cycle turning points to help understand how resilient the districts were in their recovery from the 2007-08 Global Financial Crisis (GFC) and the 2020 pandemic. Table 3 shows that peak turning points in Fermanagh and Omagh were reached between 2006-08 and the trough of the recession in 2009, though the trough was later in 2012 for employment and income per head²⁰.

¹⁹ GDP measures the value of goods and services produced. It estimates the size of the economy. GDP is equivalent to GVA plus Value Added Tax (VAT) plus other taxes on products less subsidies on products. GDP per head is calculated as GDP divided by the resident population in an area.

²⁰ Income is Gross Disposable Household Income per head, deflated by CPIH inflation.

Figure 1: Fermanagh and Omagh & MSW, Prosperity, Productivity and Income



Source: ONS (2024c and 2024e), Local Authority Productivity.

Figure 2: Employment in Fermanagh and Omagh District, NI and other MSW districts

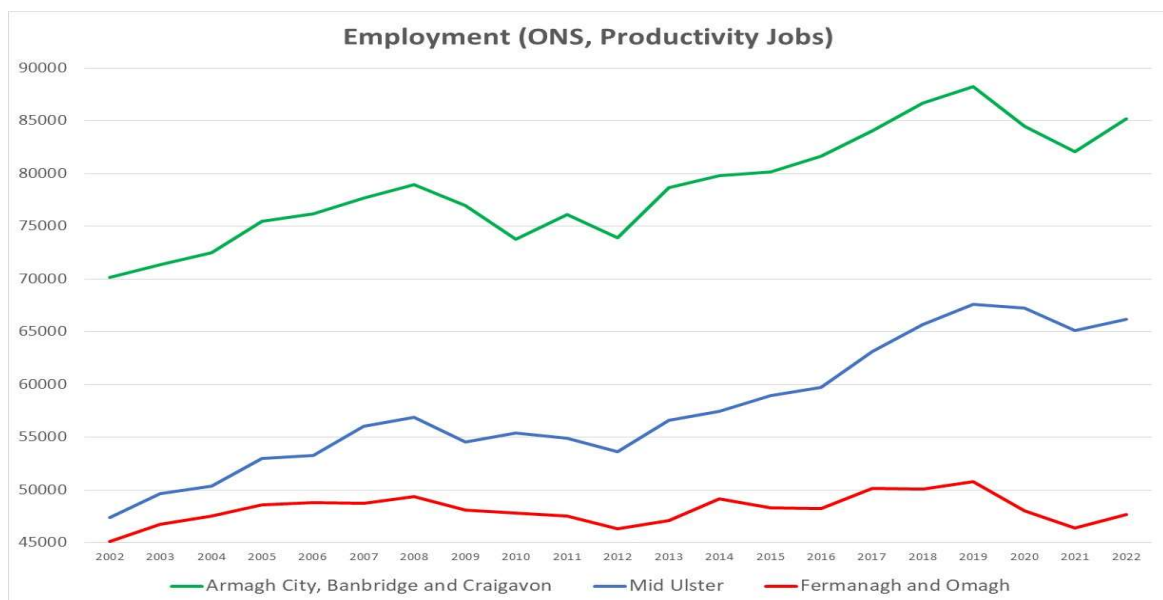


Table 3: Business Cycle Turning Points and Growth Rates in GDP, Productivity and Income

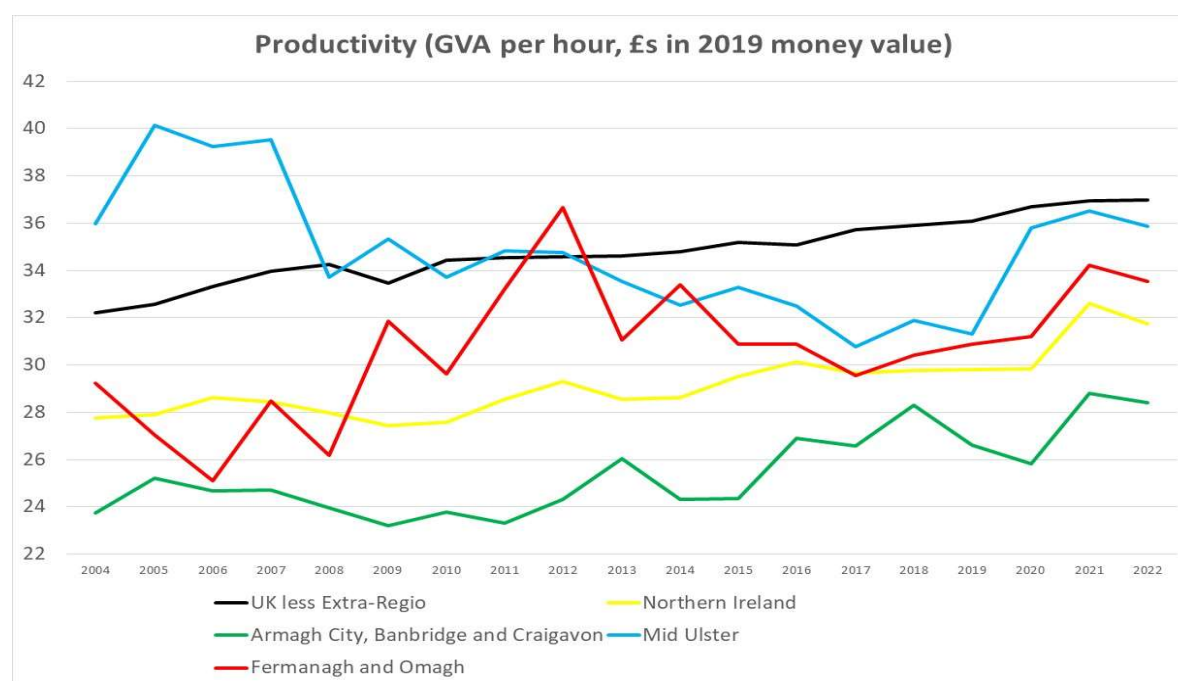
	Peak	Trough	% Loss during GFC (peak to trough)	Annual Growth rate up to GFC (2002-06)	Annual Growth rate after GFC (2010-14)	Annual Growth rate up to CV-19 (2015-19)	% Loss during CV-19 (2019-2020)	Annual Growth rate (2002-2022)
FO GDP	2006	2009	-10.01	3.08	2.0	2.74	-10.88	1.47
FO GDP/head	2006	2009	-12.15	2.39	1.5	2.38	-10.7	0.97
FO Prod. (GVA/job)	2006	2009	-8.95	1.6	1.08	2.67	-3.86	1.27
FO Jobs	2008	2012	-6.18	2.02	0.45	0.67	-5.42	0.31
FO Prod. (GVA/hour)	2007	2008	-8.18	-7.36	1.55	-1.47	0.95	1.19
FO Hours	2006	2009	-29.3	12.45	0.72	4.99	-9.93	0.97
FO Income/head	2006	2012	-9.36	5.25	-0.42	2.28	-0.65	1.56
NI GDP	2006	2009	-8.12	2.71	1.7	1.92	-12.26	1.24
NI GDP/head	2006	2010	-10.94	2.06	1.15	1.32	-12.35	0.64
NI Prod. (GVA/job)	2006	2010	-9.08	1.64	1.36	0.75	-10.9	0.71
NI Jobs	2008	2012	-5.95	1.6	-0.12	1.55	-0.31	0.46
NI Prod. (GVA/hour)	2006	2009	-4.01	1.51	0.85	0.83	0.12	0.78
NI Hours	2006	2012	-7.81	1.61	0.39	1.49	-11.28	0.26
NI Income/head	2006	2012	-5.98	3.36	0.04	1.3	-1.47	1.04

Table 3 shows that the recession in prosperity (GDP per head) was deeper in FO with a -12.2% loss (between the peak and trough) versus -10.9% in Northern Ireland, though the recession was one year shorter with the trough turning point reached in 2009. Productivity (GVA/job) had a slightly shallower recession in FO (-8.9% over three years) compared to NI (-9.1% over 4 years). The average annual growth rate before the recession and in the recovery from the financial crisis (split into two five years periods following 2009, between 2010-14 and 2015-19) are also shown. During, the recovery from 2015-19 productivity (GVA/job) average annual growth was higher in FO (2.7%) compared to NI (0.7%). The recession in productivity during the COVID-19 (CV-19) pandemic was also shallower for FO at -3.9% loss compared to -10.9% for NI. The gap between the FO and NI series has narrowed, particularly at the end of the sample in recovery from the pandemic. This is due to a lower average growth rate for jobs over the whole sample in FO, at 0.3% compared to 0.5% for NI (see Figure 2).

Employment in Fermanagh and Omagh has shown low resilience as the jobs contraction of -6.2% after the peak turning point in 2008 lasted 4 years and took 9 years to recover, only passing the 2008 peak level in 2017²¹. The recession was more severe in Northern Ireland as a whole, partly due to contagion from the Republic of Ireland property market price contraction. This led to a fall in the number of construction jobs, which is discussed in more detail in the physical capital section. The COVID-19 recession also impacted jobs with a fall of -5.4% between 2019-2020 followed by an additional decline of -3.4% between 2020-2021 (alongside rising GDP, resulting in led to increased productivity).

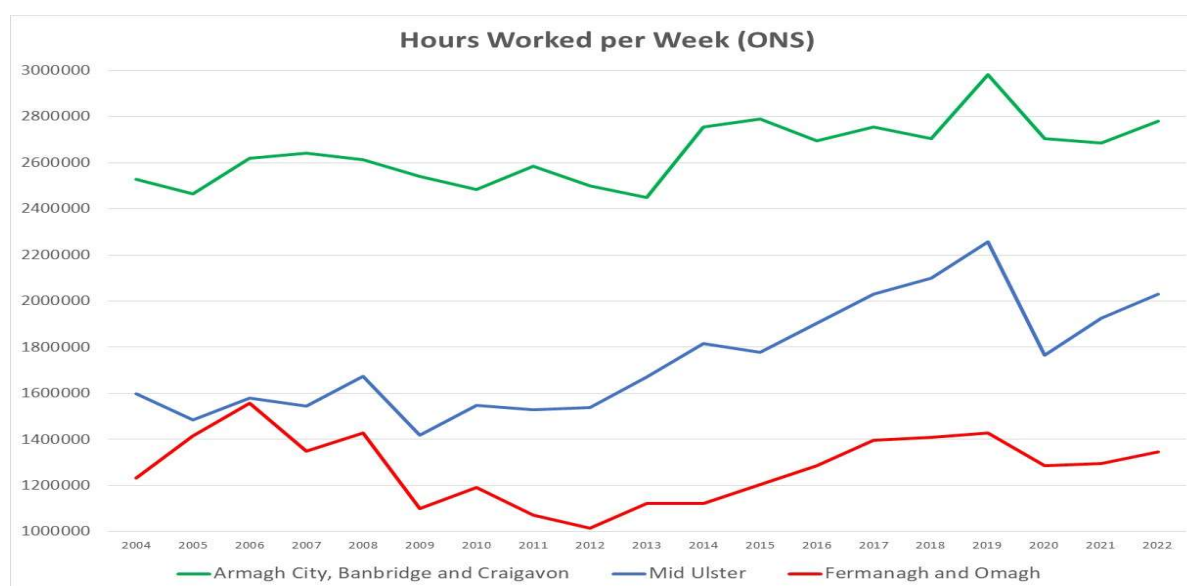
For comparison with the rest of the UK, we also present data for productivity as GVA/hour. GVA/hour contracted for one year during the recession between 2007 and 2008, the time series for the MSW districts are shown in Figure 3. In Fermanagh and Omagh, productivity peaked in 2012, coinciding with rising GDP and a reduction in hours worked (see Figure 4). Similar to employment, the FO hours has much less resilience to the shock and does not recover the 2006 peak level. The FODC average annual growth rate of hours over the whole sample was 0.97%, compared to 0.26% for NI hours. Reduced working hours over time may be due to more technology deployed in production or agriculture processes, the two largest sectors in FODC.

Figure 3: Productivity (GVA/hour) in Fermanagh and Omagh, NI and other MSW districts



²¹ The peak in Northern Ireland's house prices in 2006 is illustrated in Figure 3 of ONS publication: <https://www.ons.gov.uk/economy/inflationandpriceindices/bulletins/housepriceindex/december2023>. This was followed by a contraction of employment in the construction industry during 2008, see: <https://www.constructionnews.co.uk/sections/news/northern-ireland-slowdown-worst-since-the-mid-1990s-19-08-2008/>.

Figure 4: Hours Worked per Week Fermanagh and Omagh, NI and other MSW districts



Industrial Structure/ Agricultural Economy

We calculate location quotients (LQs), these give an indication of the level of specialisation by comparing the share of employees by sector in Fermanagh and Omagh with the sectoral shares in Northern Ireland. A location quotient greater than one indicates higher specialisation than the NI level of employment in that sector. Table 4 shows the nine highest location quotients for Fermanagh and Omagh along with the employee numbers in 2017, 2022, the 2022 employee sector share, and the growth rate in employees between 2017 and 2022. The largest location quotient is for the agricultural sector followed by the mining and quarrying and construction²². The number of employees in the agricultural sector have contracted by -7.7% between 2017 and 2022 while employees in manufacturing have grown by 25.4%. The largest shares of employees in 2022 were in wholesale and retail trade (17.9%), followed by those employed in human health and social work (17.6%).

²² It is worth noting that the Business Register and Employment Survey (BRES) only counts those in employment and not the self-employed. As agriculture has a large share of self-employed people who will not be included in this survey, this may increase the LQs. Also see NI Assembly Briefing Paper 14/24 "Government data reporting on self-employment trends from 2019–2024" at: <https://www.niassembly.gov.uk/globalassets/documents/raise/publications/2022-2027/2024/economy/1424.pdf>

Table 4: FODC Highest Location Quotients

Sectors	2017 Emp.	2022 Emp.	Share in 2022	Growth Rate 2017-2022	Location Quotient 2022
A: Agriculture, forestry and fishing	1943	1794	3.9%	-7.7%	2.54
B: Mining and quarrying	263	266	0.6%	1.1%	2.47
F: Construction	3106	3181	6.9%	2.4%	1.47
E: Water supply, sewerage, waste management & remediation activities	481	559	1.2%	16.2%	1.28
C: Manufacturing	5047	6329	13.8%	25.4%	1.26
P: Education	4680	5343	11.7%	14.2%	1.19
G: Wholesale and retail trade; repair of motor vehicles and motor cycles	8306	8210	17.9%	-1.2%	1.13
Q: Human health and social work activities	7608	8049	17.6%	5.8%	1.05
I: Accommodation and food service activities	2987	2918	6.4%	-2.3%	0.97
Total Fermanagh-Omagh Employees	43,540	45,862		5.3%	

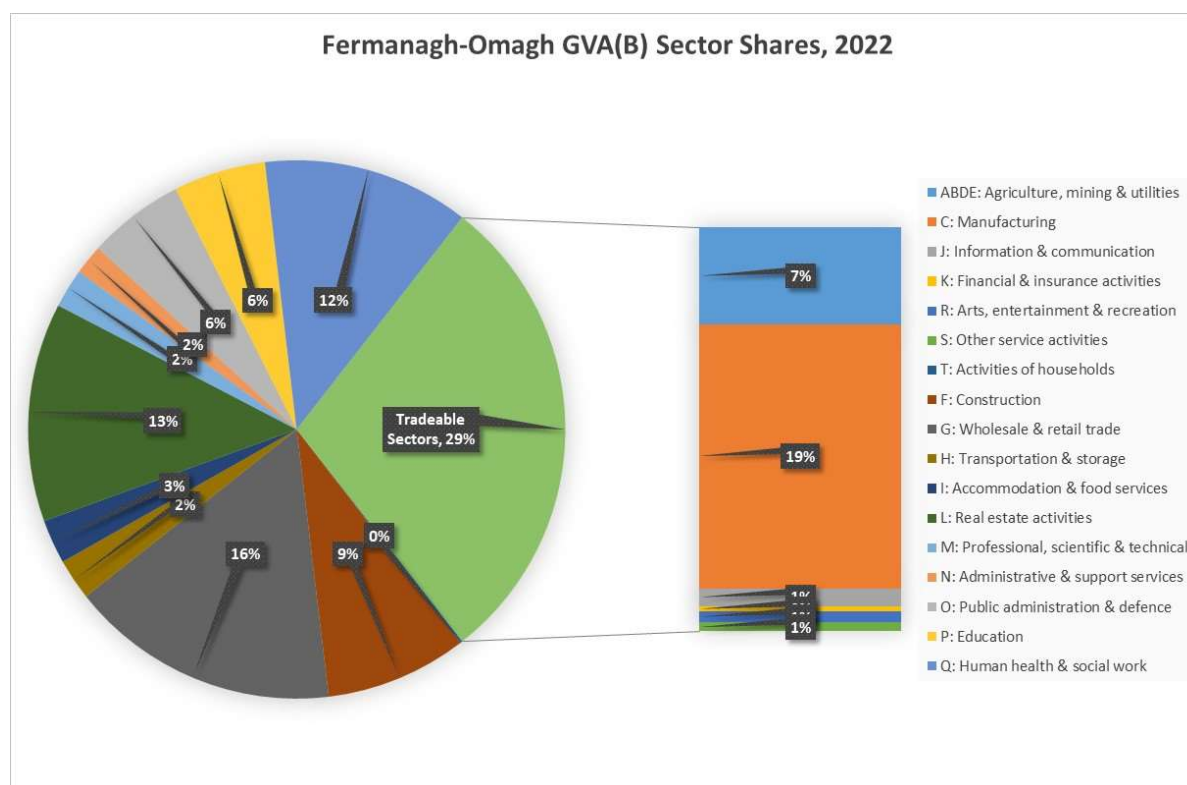
Source: [Northern Ireland Local Labour Market Insight dashboard](#), Business Register and Employment Survey (BRES) Employee Jobs by Industry Sector data from Labour Market insights. Added Annex 1 for Agricultural jobs in BRES, published 26/9/2023 accessed from <https://www.nisra.gov.uk/statistics/annual-employee-jobs-surveys/business-register-and-employment-survey>

OECD (2016) found that regions with larger tradeable sectors²³ were able to catch up to the frontier regions faster than those regions with lower shares that were diverging. Tradeable sectors bring more money into the community. To become more prosperous, FO needs to grow the value produced by the sectors that produce tradeable goods and services.

To calculate the share of tradeable sectors in Fermanagh and Omagh we analyse the Gross Value Added (GVA) sector shares for 2022, showing that 29% of FO's GVA was classed as tradeable (see Figure 5 and Table 5 for the shares of the sectors). The share of tradeable sectors decreased over time from 30.5% of GVA in 2000 to 26% in 2017, climbing back to 32.7% in 2020. In particular, the share of the manufacturing sector increased from 14% of GVA in 2000 to 21.7% in 2020 (falling to 19% in 2022). Overall, the manufacturing sector has grown over time in output and employment increasing the contribution of this important tradeable sector in Fermanagh and Omagh.

²³ The OECD (2018) classifies tradeable sectors as the following: agriculture (A), industry (BCDE), information and communications (J), financial and insurance activities (K) and other services (RSTU). The remaining sectors are then classified as non-tradeable. The OECD defines tradeable sectors as "those that produce goods and services that can be traded across regions and international borders". Firms can operate in sectors that are tradeable, although they may not actually engage in trade, but they are exposed to competition from abroad. See Chapter 2, page 59 in OECD (2018).

Figure 5: Fermanagh and Omagh district, Share of Tradeable vs. Non-tradeable output



Source: ONS (2024d), [Regional GVA \(balanced\) by industry](#): Northern Ireland.

The largest sector of employment in Fermanagh and Omagh, wholesale and retail also exhibits the second largest share of GVA growing from a share of GVA of 14.3% in 2000 to 18.4% in 2017 but fell to 16% in 2022. The share of GVA in human health and social work is 12% in 2022 just behind real estate activities at 13% (note that this sector includes imputed rental estimates²⁴ that accounts for 10%). Table 5 compares FO output sector shares to the other MSW districts and Northern Ireland. Mid Ulster has the largest share of tradeable sectors with a large manufacturing sector. Fermanagh and Omagh has a significant share of information and communications sector of 1.3% of GVA, higher than other MSW districts but lower than Northern Ireland at 3.5% GVA.

²⁴ ONS use imputed rental data to estimate the housing services that households consume when they do not rent their residence. Imputed rent is the rental price that an individual would pay for an asset they own. The methodology ONS use to calculate imputed rent uses the share of the different types of housing stock multiplied by median house prices of an area.

Table 5: Output Sector Shares of MSW districts and Northern Ireland in 2022

Sector	Fermanagh and Omagh	Armagh City, Banbridge & Craigavon	Mid Ulster	Northern Ireland
ABDE: Agriculture, mining & utilities	6.9	5.1	5.9	4.5
C: Manufacturing	18.9	19.7	28.7	12.8
J: Information & communication	1.3	0.5	0.3	3.5
K: Financial & insurance activities	0.4	0.5	0.3	4.6
R: Arts, entertainment & recreation	0.8	0.5	0.4	1.0
S: Other service activities	0.6	1.1	0.9	1.5
T: Activities of households	0.1	0.1	0.1	0.1
Tradeable Sectors	29	27.6	36.6	28
F: Construction	8.5	9.5	16.1	8.3
G: Wholesale & retail trade	16.3	15.6	18.9	14.4
H: Transportation & storage	2.5	5.5	2.1	3.4
I: Accommodation & food services	2.6	1.8	1.3	2.6
L: Real estate activities	13.1	12.6	11.1	11.6
(Owner-occupiers' imputed rental)	(9.9)	(9.9)	(7.1)	(8.3)
(Excluding imputed rental)	(3.2)	(2.7)	(4)	(3.3)
M: Professional, scientific & technical	2.3	3.0	1.7	4.8
N: Administrative & support services	1.8	2.4	1.2	3.2
O: Public administration & defence	5.8	4.5	2.3	6.8
P: Education	5.5	5.8	4.9	5.3
Q: Human health & social work	12.5	11.9	3.7	11.7

Source: ONS (2024d) Regional GVA (balanced) by industry, Northern Ireland.

3. Fermanagh and Omagh Capital Assets

A key driver of productivity levels and growth rates is the availability of capital assets (Becker and Martin, 2023). Capital is an input into a production process along with labour. Capital can be both a substitute and complement to other factors of production. For example, capital assets can enable automation and replacement of workers, and/or greater availability of capital assets per worker can enable improved efficiency of production.

Physical and Intangible Capital

Physical capital accounts for the tangible or fixed assets that contribute to making firms and places productive (see Becker and Martin, 2023). These include assets that play a direct role in the production process, such as buildings, machinery, and transport equipment. These

physical capital assets improve productivity by providing people with better tools and better environments in order to complete tasks, and so a greater stock of physical capital will typically lead to a greater level of production.

Physical capital also includes the infrastructure²⁵ – such as roads, railways²⁶ and the water and sewerage network – that play a more indirect role in production. Infrastructure facilitates a greater range of activities by connecting people and removing barriers to economic activity. For example, infrastructure provides firms with the means to transport goods, but better connectivity creates a wider population base from which to draw its employees. Creation of new infrastructure increase economic activity in construction employment and new job opportunities running services.

Gross Fixed Capital Formation (GFCF) is the ONS measure of whole economy investment. The ONS have released experimental GFCF data by asset type for ITL3 level regions using sub-national data sources (see ONS, 2022). These series are utilised as productivity drivers within the TPI Productivity Lab’s Scorecards at the ITL 1 and 3 level (Garcia et al, 2024). In TPI’s Scorecard Fermanagh and Omagh appears just below the Northern Ireland median levels of whole economy and ICT investment per job in 2019 and 2020. However, the capital investment in intangibles per job is much lower than the Northern Ireland median, which reflects the industry sector structure of the economies. Where GFCF exceeds the depreciation and retirement of existing capital, net capital formation will be positive, resulting in an increase in the net capital stock. As well as measuring the value of capital stock, it is possible to measure the flow of capital services, these are more heavily weighted to shorter-lived assets such as computer software.

Table 6: Whole Economy Investment for Northern Ireland & Fermanagh and Omagh, 2020

	Northern Ireland		Fermanagh and Omagh	
	Shares (%)	Amounts (£ millions)	Shares (%)	Amounts (£ millions)
Whole Economy Investment (Total GCFC)		9180.09		515.38
Buildings and structures	66.1	6066.32	72.4	373.34
(Other Buildings & Structures)	(18)	(1089)	(33)	(123)
Transport equipment	2.4	219.48	2.9	14.8
ICT equipment	2.6	234.75	2.6	13.39
Other tangible assets	8.2	753.28	7.9	40.65
Intangible assets	20.6	1895.66	13.9	71.63

Source: ONS (2022) with other buildings and structure from ONS (2023b).

²⁵ The FODC Socioeconomic profile by Perspective Economics (2023) quantifies the scale of the infrastructure challenge in FODC.

²⁶ Although no train line currently serves Fermanagh and Omagh there are plans to create new railway lines across the Island of Ireland - if this goes ahead Omagh will be included, Fermanagh is the only county not included. The All-Island Vision for a New Age of Rail notes that a Fermanagh rail connection is not financially feasible, see: <https://www.infrastructure-ni.gov.uk/news/all-island-vision-new-age-rail>

Analysing the ITL3 data for Northern Ireland from the ONS (2022) publication, whole economy investment is approximately 20% of Gross Value Added in 2020 (and for Fermanagh and Omagh district). The total amounts of whole economy investment are shown in Table 6 along with the amounts and shares of each of the asset groupings. In Fermanagh and Omagh the other buildings and structures (excluding dwellings) series represents about a third of the buildings and structures asset grouping in Table 6. We compare the time series of asset types for Northern Ireland and Fermanagh and Omagh in the charts below over time in constant prices (the series are deflated by the Northern Ireland GFCF deflators from Becker and Martin, 2023²⁷). Becker and Martin (2023) calculate a regional business investment series (total investment less government and dwellings investment)²⁸. They refer to this estimate as ‘market sector’ investment and we calculate this for Northern Ireland and Fermanagh and Omagh district, the green line in Figures 6 and 7 (MktInv).

Table 7: Comparison of Investment Assets, growth rates over time (in real terms)

Northern Ireland	1998-2020	1998-2008	2009-2017	2018-2020
Total GFCF	1.9	6.4	-1	-6.2
Market Sector Investment	2.8	7.4	0.5	-6.7
Buildings and structures	1.9	7.2	-1.9	-6
Transport equipment	4	8.4	7.7	-24.1
ICT equipment	3.5	12	-2.9	-8.3
Other tangible assets	-0.4	4.1	-1.8	-12.4
Intangible assets	4.6	4	6.6	0.9
Fermanagh and Omagh	1998-2020	1998-2008	2009-2017	2018-2020
Total GFCF	1.9	7.5	-1.9	-6.9
Market Sector Investment	3.28	7.2	1.6	-6.8
Buildings and structures	1.9	7.6	-2	-7.8
Transport equipment	1.2	2.3	7	-22.6
ICT equipment	5.7	13.3	-5.2	10.8
Other tangible assets	2.3	6.2	-2.4	1.7
Intangible assets	5.3	3.9	7.7	3

Source: ONS (2022) Experimental GFCF by asset group and GFCF deflators from Becker and Martin (2023).

Becker and Martin (2023) report that Northern Ireland whole economy investment (total GFCF) has the highest average annual growth in the market sector for the sample 1997-2019 when compared to Scotland, Wales and English ITL1 regions (we can see from Figure 6 that the market sector investment series for Fermanagh and Omagh almost doubled between 1997 and 2017). We compare our calculations of Northern Ireland and FO of the annual

²⁷ Becker and Martin (2023) deflators can be downloaded from the TPI web-site at:

https://figshare.manchester.ac.uk/articles/dataset/Regional_capital_investment_deflators_UK_by_industry_and_asset_1997_to_2019/24065550

²⁸ Becker and Martin approximate business investment by excluding industries that are predominantly non-market, so remove public administration and defence (section O), education (P) and health and social care (Q) industries, which are largely government-run industries in the UK. They exclude the real estate industry (L) in order to exclude investment in the dwellings asset (allocated only to the real estate industry).

average growth rate over different time periods in Table 7 for total GFCF, the market sector investment series and the GFCF asset groupings. Here we find higher annual average growth rates for FO for total GFCF, market sector investment, ICT equipment, other tangible assets and intangible assets²⁹ over the whole sample. We also see positive average annual growth rates over the most recent sub-sample 2018-2020 for intangibles and ICT. Investment in these assets should increase productivity over time.

Figure 6: NI Market & Whole Economy Investment (GFCF) by Asset Groupings

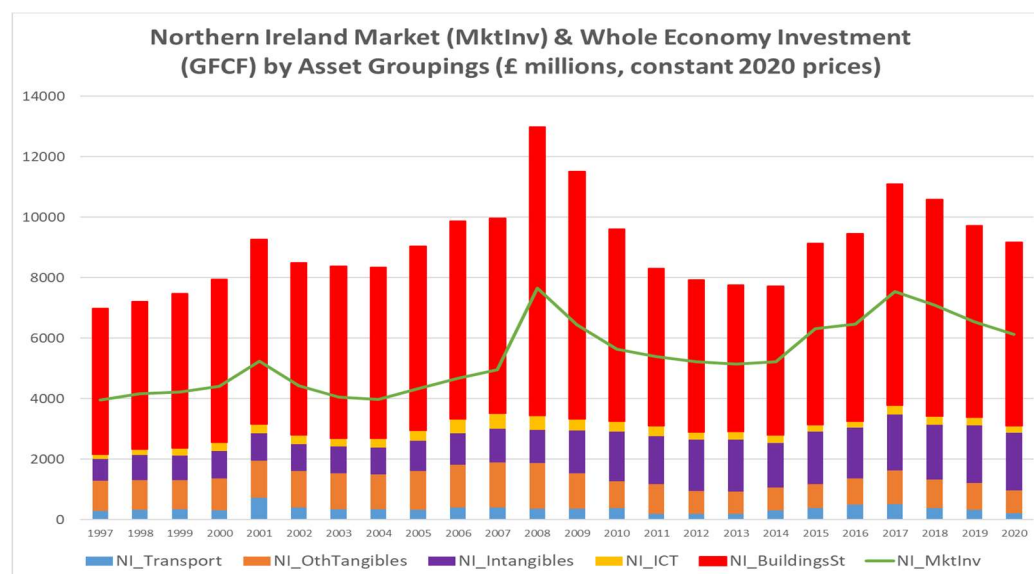
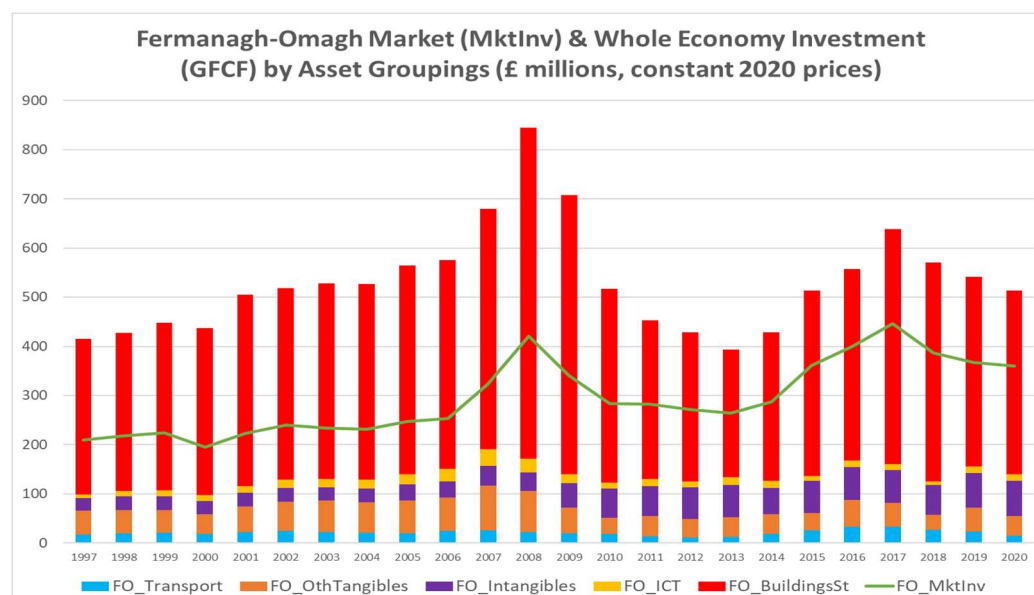


Figure 7: FODC Market & Whole Economy Investment (GFCF) by Asset Groupings



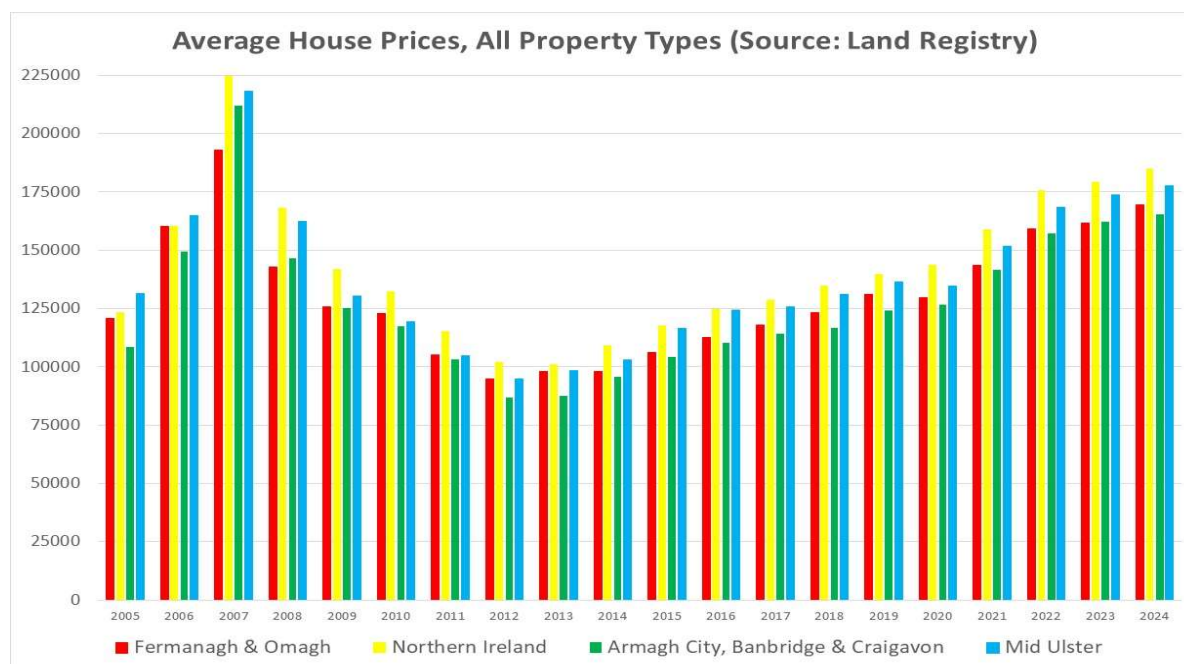
Source: ONS (2022) Experimental GFCF by asset group and GFCF deflators from Becker and Martin (2023).

²⁹ Within intangibles are research and development; mineral exploration and evaluation; computer software and databases and entertainment, literary or artistic originals.

House Prices and Affordability

The time series for nominal average house prices for all property types are shown in Figure 8 for Northern Ireland and the Mid South West districts. Here we can see the effect of the boom in house prices reaching a peak in 2007, and the level of the average prices not yet returning to those rates. This could mean some households in Northern Ireland are in negative equity with their mortgages if they bought at or near the 2007 peak.

Figure 8: Northern Ireland, FO and MSW Districts Average House Prices (£s)



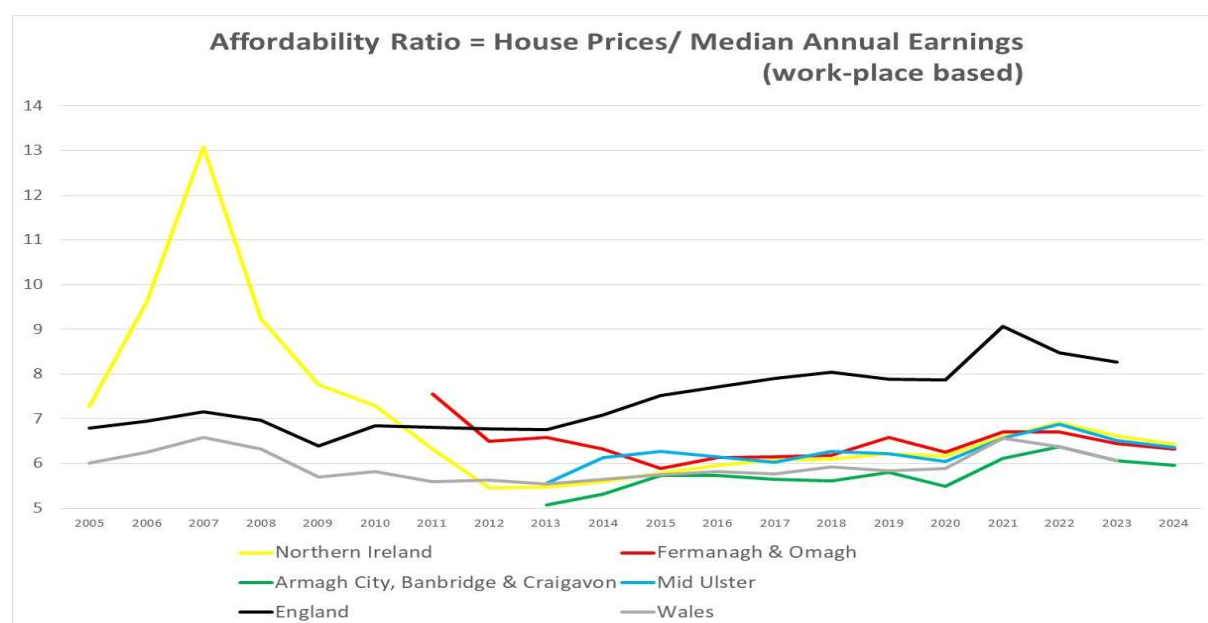
Prior to the onset of the financial crisis, the Fermanagh and Omagh local economy was being driven by a housing construction boom. It was reported³⁰ that in 1994/95, planning approval was granted for 1,845 single homes in rural parts of Northern Ireland. By 2004/05, the annual figure had soared to 9,520 homes. There was contagion from the Republic of Ireland property crash, but what was unique in Northern Ireland was the announcement that there would be a clamp down on the approval (and renewal) of building sites in rural areas with the planning policy, Sustainable Development in the Countryside, introduced in 2006. This caused a supply side shock and the ensuing increase in bungalows being built. As the price of building sites increased, farmers applied for more building sites to build bungalows in the period between the planning change being announced in 2006 and being implemented in 2010. As people felt wealthier – and credit was accessible – the retail sector grew strongly. Once the credit crunch arrived, Fermanagh and Omagh was very exposed. There was a large fall in construction jobs, with 26,000 jobs lost in Northern Ireland during the downturn from 2007 to 2011³¹. The FODC GVA share of the construction sector fell from a high of 11.5% in 2001 down to 6.5% contribution to the local economy in 2012, then increased up to 9.5% share in 2016.

³⁰ <https://www.belfasttelegraph.co.uk/news/plan-to-remove-bungalow-blight-from-countryside/28106811.html>

³¹ <https://www.bbc.co.uk/news/uk-northern-ireland-13154218>

The house price affordability ratio is calculated as the average house price for all properties divided by the median annual earnings (for work places from the Annual Survey of Hours and Earnings). The affordability ratio for Northern Ireland and the Mid South West districts are compared in Figure 9 along with the ratios for England and Wales. We see that during the 2007 house price boom that the affordability ratio for Northern Ireland was almost twice that of England. From 2012 the affordability ratio fell to below the England level for Fermanagh and Omagh, this is due to house prices rising at a higher growth rate for England, see ONS (2024b). We include the housing affordability ratio for FODC from 2011, here we see it is higher than the NI between 2011-15.

Figure 9: Northern Ireland, FO and MSW districts Average House Prices



Source: House Prices from Land Registry and Incomes from NISRA Annual Survey of Hours and Earnings, <https://www.nisra.gov.uk/statistics/work-pay-and-benefits/annual-survey-hours-and-earnings>. Note the earnings series for LGDs from NISRA starts in 2013 and is extended back to 2011 for FODC with an average of the earnings series for Fermanagh and Omagh.

In the Appendix, we present the tables for our experimental data tool (see Table A1 for the list of abbreviations for Northern Ireland local government districts, LGD). These are calculated for 361 UK local authority districts. We compare a number of indicators to represent physical capital in Table A2 including 2024 median house prices, 2023 domestic mean electricity consumption, 2024 gigabit-capable broadband availability, 2021 share of households privately renting, population density and the accessibility of supermarkets in LGDs with the number of supermarkets for 10,000 people in 2023.

We find that Mid Ulster scores highest of the NI LGDs in the physical capital ranking (146/361) when compared to all UK local authorities with the highest electricity consumption, this aligns with Mid Ulster having a large manufacturing sector (29% of GVA in 2022, see Table 5). Fermanagh and Omagh ranks 187/361, just below half of the UK index ranking. Median house prices in Fermanagh and Omagh were below the NI and UK medians (with housing

affordability at a ratio of 6.5 house prices to median salary, see Figure 9). Broadband availability is below the NI median, but better than the UK median, and has been increasing over time as noted in scorecard in Table 1 (in the Executive Report).

As noted above, Fermanagh and Omagh is the most sparsely populated LGD in Northern Ireland with population density of 40.79 people per kilometre squared. Fermanagh and Omagh has the greatest number of supermarkets per 10,000 people, higher than the NI median (but this will be due to the large area covered by the district). The cross-correlation coefficients for productivity (GVA/hour) with each variable are shown in the last two rows of Table A2. These show the strength of association between productivity and the variables for the full sample of UK authorities and for LGDs in NI. The highest correlation is found for median house prices and productivity in the UK at 0.49 but this does not hold for NI with a low negative correlation of -0.02. The highest correlation for NI is a negative association between productivity and the share of households in private rental.

Social Capital

Social capital refers to the extent and nature of peoples' connections with others and the collective attitudes and behaviours between people that support a well-functioning, close-knit society. It can be classified into four categories: personal relationships, social network support, civic engagement, and trust and co-operative norms. Putnam (2000) describes "bonding" and "bridging" social capital. Bonding social capital is the connections within social groups or communities and is generally a result of similarity in demographic characteristics, attitudes and available information and resources. Bridging social capital is between social groups. Putnam (2000) suggests that bonding social capital is good for "getting by" and bridging is crucial for "getting ahead". Putnam described bonding social capital as inward looking, reinforcing exclusive identities and promoting homogeneity; whereas bridging social capital as outward looking, promoting links between diverse individuals.

We examine data on social capital indicators in the experimental data tool in the Appendix, Table A3. These include the share of children living in relative poverty³² (the inverse of this is used), the population change (between the 2011 and 2021 Census), the number of museums per 100,000 people (to signify cultural assets) and then results from the ONS local authority well-being survey for anxiety (inverse of 10-anxiety is used), happiness and life satisfaction. Fermanagh and Omagh has a higher share of children living in relative poverty than the NI and UK medians and lower population change. FODC scores well on the rest of the indicators with a high share of museums per 100,000 people, lower levels of anxiety, higher happiness scores and life satisfaction the same as the NI median. Overall FODC is in the top 15% of the index scoring 47/361 with Mid Ulster near the top of the UK ranking with larger population change than the NI median.

³² This variable shows the percentage of children under 16 who are living in a relative low-income household. In these statistics, a family must have claimed Child Benefit and at least one other household benefit (Universal Credit, tax credits or Housing Benefit) to be on a low income.

Institutional Capital

The Levelling Up White Paper (DLUHC, 2022) describes the important role that institutional capital can play in the development of local economies through strong leadership and local governance; fiscal, administrative, and policy autonomy; relationships between local government, businesses, communities, and individuals; and local knowledge. As such, it positions key local anchor institutions and their ability to work towards mutually beneficial aims as a central theme to institutional capital. Rodríguez-Pose (2020) links the role of institutions to the fortunes of territories, arguing that institutions directly influence local economic growth as they affect the capacity of economic actors interacting within places to attract investment and high-growth industries.

Some thinking already connects elements of institutional capital, such as the benefits of strong networks (see also social capital) for knowledge transfer and interactive innovation, and suggests that this is best realised at the regional level as part of regional policy (Morgan, 1997). Measuring institutional capital may therefore require gaining an understanding of a locality's networks and ecosystems because collaborations, both formal and informal, will support the social development and economic growth of a region. Local institutions working together is crucial to increase their economic impact and sustainability in their areas such as through more locally focused recruitment and procurement strategies (see Martin, et al, 2022). We explore institutional capital in the qualitative analysis in the next section.

Donaldson et al (2025) stress the importance of policy and institutions in Northern Ireland, particularly as the devolved administration has collapsed 6 times and been in abeyance for 40% of the time since 1998. Linked to the absence of the NI Executive has been the failure to implement economic strategy, but the 2024 Economic Vision is currently being implemented, and this includes NI's productivity as a key pillar. Donaldson et al (2025, page 2) suggest, that to close the productivity gap of NI with the UK within institutional capital:

“there are four important policy objectives for The Executive Office and Department of Finance, working alongside all other departments, and in partnership with the likes of the NI Audit Office, NISRA, and ONS: (i) policymaking needs to be joined-up with a long-term focus, which requires stable government; (ii) the administration of the public finances needs to be improved, by having multi-year budgets and a thorough reform of public service delivery, so as to improve the effectiveness of public expenditure; (iii) more detailed and timely data is required for policy evaluation; and (iv) increase trust and accountability through electoral engagement and the transparency of the policymaking process.”

Financial Capital

The accessibility of finance in a place plays a critical role in determining the level of economic dynamism and resilience of the place. It is essential for allowing firms to commercialise new operations, enter new markets, and achieve rapid growth. As such, finance is important for new firms to establish themselves, and for older firms to scale-up their operation. These firms can be part of a new or emerging economic sector, and the access to finance is vital for the place to be able to establish and grow new economic sectors.

In the context of this report, financial capital refers to the monetary resources and instruments that businesses use in order to establish and expand their operation. This includes bank loans, peer-to-peer loans, credit card loans and a wide range of other financial mechanisms. Flows of financial capital do not necessarily pertain to a set of assets within the place, but to the extent that individuals and organisations in the place can tap into sources of finance that may or may not be managed locally. The flow of finance can take two forms: first is equity finance which involves investors acquiring an ownership stake in the recipient organisation; second is debt finance, which involves the lending of money, typically from banks, in exchange for an obligation to repay the sum with interest. Finance can be provided by a wide range of actors, including banks, venture capital funds, pension funds, private equity firms, angel investors, seed accelerators, each of whom will have their own skill-sets and risk preferences.

Begbies Traynor group reported on research from Red Flag Alerts on companies in Northern Ireland and found that for the 2024 quarter 1 release 8,991 firms were in financial distress with 718 in critical distress. Earlier news reports suggest that the number of firms in financial distress in Northern Ireland had increased by 40% by the end of 2023 compared to 2022³³, this is mainly due to businesses having to deal with increased interest rates on debt (due to the Bank of England increasing the base rate). The British Business Bank has set up a new fund to offer debt and equity finance to businesses in Northern Ireland³⁴.

The Demos Good Credit Index (2023) report for consumer credit noted that Fermanagh and Omagh district has an overall relatively good credit rating in the top half of the distribution. Also, the Department for the Economy in 2019 noted a falling trend of insolvencies in NI between 2013-2018³⁵. Distance is important for determining access to equity finance. A lack of access results in investors not being close enough to form the relationships and collect the information necessary to make investment decisions (Lee and Brown, 2017). Perspective Economics (2023) note that private investment levels are low in Fermanagh and Omagh. They examine Beahurst data and note “that despite accounting for more than one tenth of Northern Ireland’s businesses, the District accounts for just 0.5% of private investment.”

Business dynamism refers to the rate of entry and exit of firms to the market (see Bonner, et al, 2023). Increasing rates of dynamism are an indication of a healthy economy with increasing productivity, innovation, competition and job creation. Business churn (business birth rate plus the death rate) has increased in Northern Ireland from 16.6% in 2010 to 18.3% in 2021, but with the UK churn rate at 23.5%, Northern Ireland is seen as a less dynamic economy.

In terms of companies raising investment Perspective Economics (2023, p.26) note that 10 companies in FODC have received private investment which represents 3% of the total number of investment raising companies in Northern Ireland (10 out of 334). They note that

³³ See Begbies Traynor story: <https://www.begbies-traynorgroup.com/news/business-health-statistics/over-half-a-million-uk-businesses-fighting-for-survival-as-uk-economy-stagnates> (25/4/24) and The Irish News <https://www.irishnews.com/news/business/huge-hike-in-companies-reporting-serious-financial-distress-QTEBUBN3FCSDPL3ZHP235H344/> (22/1/24) both cite Red Flag research.

³⁴ See British Business Bank (2024) and <https://www.british-business-bank.co.uk/finance-options/nations-and-regions-investment-funds/investment-fund-for-northern-ireland>

³⁵ See: <https://www.economy-ni.gov.uk/news/insolvencies-northern-ireland-fall-lowest-rate-decade>

the “total value of private investment raised by companies in Northern Ireland since 2007 is £675m, with a median value of £300k. By comparison, Fermanagh and Omagh investment raising companies have secured a total of just £3.4m since 2011 (just 0.5% of the Northern Ireland total), with a median value of £200k. This is partly due to the sectoral profile of the District – more established manufacturing and engineering companies have less need to raise investment compared to, for example, companies working in software development or other technology companies that have higher start-up rates.”

We examine data on financial capital indicators in the experimental data tool in the Appendix, Table A4. Here the indicators include a measure of prosperity (GDP per capita for 2022), Gross Disposable Household Income per head in 2022 (GDHlph), 2023 gross median weekly wages³⁶, the share of new businesses created in 2023³⁷ and the share of high growth businesses in 2023³⁸. In Table A4, we see that FODC is above the NI median for prosperity, but below for household disposable income, weekly wages, business births and high growth business. Overall FODC is in the bottom 1% of the indicator (360/361) with very low ranking financial capital. Belfast is the highest ranking NI LGD within the UK ranking at 228/361. Of the NI LGDs, Belfast has the greatest prosperity, wages and share of high growth businesses, but disposable income is below the NI and UK medians.

Human Capital

Human capital describes how well-equipped people are to using other assets to produce beneficial outcomes. It reflects people’s behaviours, knowledge, skills, experience, and attributes that allow people to be productive. These features are not easy to isolate or measure. Human capital is important to consider from a policy perspective because many of the investments in education and health by the state will see higher returns for individuals, firms and the economy through higher skills and productivity. It is also important to consider how firms are investing in skills through job-specific training. The key metrics that are used to evaluate human capital are education, skills, training and labour market outcomes (which includes employment, wages, and health of the population). Human capital provides a key feedback loop and returns are greater in low-tech sectors (Roper, 2023). Oulton (2000) found that low levels of human and physical capital in manufacturing account for around 60% of the productivity gap between UK businesses and US-owned businesses located in the UK.

Deprivation & Health

The average life expectancy in Fermanagh and Omagh for women as of 2019-21 is 82.6 years and for men, 78.9 years, with the life expectancy lower in the most deprived areas by 2.6

³⁶ This variable shows the average (median) weekly pay, before tax, based on where people live taken from the Annual Survey of Hours and Earnings (ASHE).

³⁷ This is the share of newly registered businesses out of the total active business population.

³⁸ High growth businesses have an average growth in employment of greater than 20% per year over a three-year period. This variable shows the share of high growth businesses as a percentage of active businesses with 10 or more employees.

years for men and 2.5 years for women³⁹. The majority of the population aged 16-64 were in good health with 6.4% of over 65 years reported to be in very bad health in Omagh. The rurality of Fermanagh and Omagh has raised concerns of the levels of loneliness experienced by older people and reducing it is seen as a local priority. Other priorities for the council include enhanced mental health provision and tackling poverty and disadvantage.

The district performs well in every major disease indicator relative to the NI average. The hospital admissions rate per 100,000 for both circulatory & respiratory illnesses closely mirror that of the NI average and have been falling steadily since 2019. However, the prescription rate for Statin, a drug offered to patients with high cholesterol levels and thought to be at greater risk of a heart attack or stroke, was 193 per 1,000 population in 2023. This was higher than the NI average of 171 per 1,000 population and has been increasing since 2019. The hospital admission rates per 100,000 stood at 8,705 in 2023, significantly higher than the NI average of 7,651.

The percentage of Primary 1 pupils thought to be overweight or obese in 2023 was 19% compared to an NI average of 20%. For Year 8 pupils, the figure stood at 27% compared to the NI average of 26%. The picture changes significantly in the most deprived wards of the district, with obesity rates for both Primary 1 & Year 8 pupils standing at 24% and 32% respectively.

Across Fermanagh and Omagh, 6% of Super Output Areas (SOA)⁴⁰ are in the top 10% of deprived areas of Northern Ireland. The area claims almost one tenth of 10% most deprived areas in NI. In 2017, between 10% and 22% of households in the area were living on 60% of the median income in Northern Ireland. Devenish is the most deprived area in Fermanagh and Omagh district and the 44th most deprived out of the 890 SOA in NI. The area has an average of 20.3% child poverty and 8.4% of ageing poverty, both of which are above the NI average.

Labour Market

A key point of interest highlighted by Fermanagh and Omagh during the collaboration producing this report, has been on the participation of women in the labour force in the district. Using both the Labour Force Survey (LFS) from 2023 for NI and the UK Census data from 2021, we have established that around 67% of women (working age population, 16-64 years) in Fermanagh and Omagh are economically active; which although lower than the NI average (72%), may be a reflection of the age structure of the resident population.

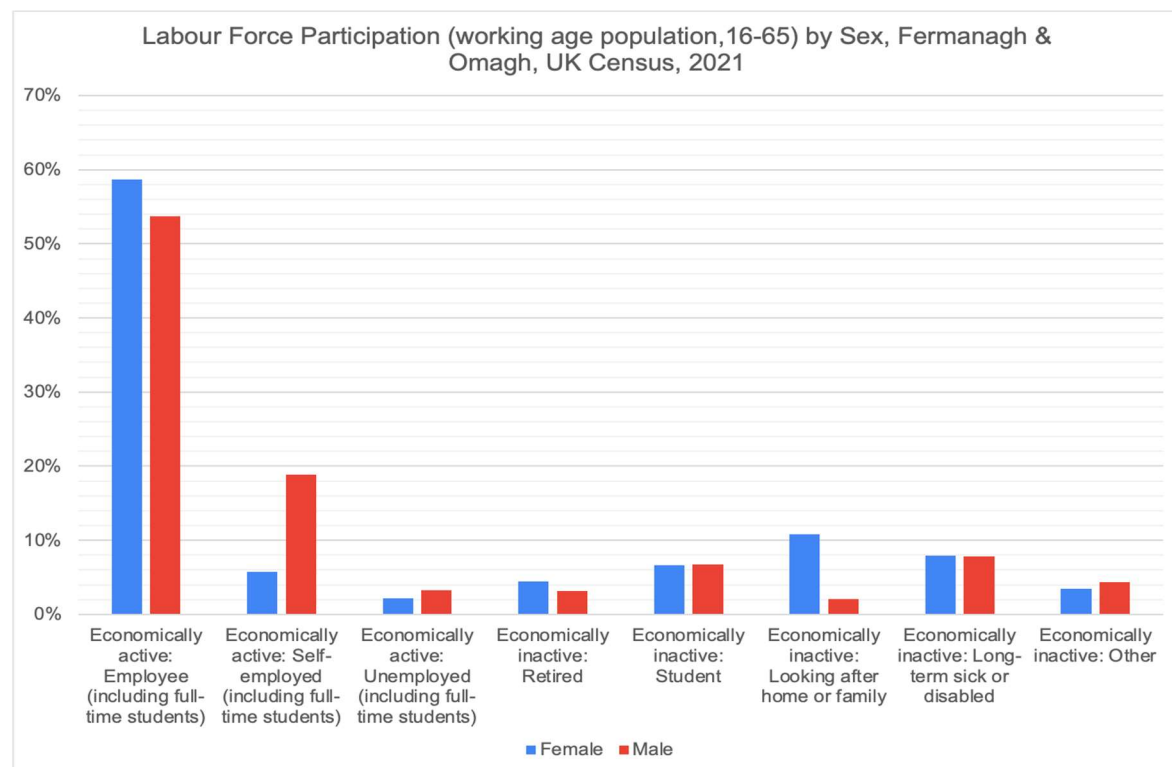
Figure 10, taken from the UK Census, shows a breakdown of participation in the labour force in Fermanagh and Omagh. One key point here, is that while a greater proportion of women are employees than men, and a lower proportion of women are economically inactive (22% versus 25% in the UK average), over 10% of working-age women in FODC are inactive due to caring or child responsibilities. This represents around 32% of the inactive group for women,

³⁹ This data is from Fermanagh and Omagh people and Communities report People and Communities, Census 2021 Population report card, FODC Socioeconomic profile (2023) and Levelling Up Bid Fermanagh and Omagh District, Council Lakelands Project and Baseline Analysis Report 2023 'What we know'.

⁴⁰ Super Output Areas are statistical geographies that group smaller output areas for reporting small area statistics.

which is higher than the UK average for women in this category (around 27% of those inactive in 2024). Therefore, it is possible that there is a segment of the local workforce who would like to work but are inactive due to home, child or caring demands; the figure for men in the same category in FODC is much lower (9% of working age economically inactive men, 2% as a proportion of the whole labour force).

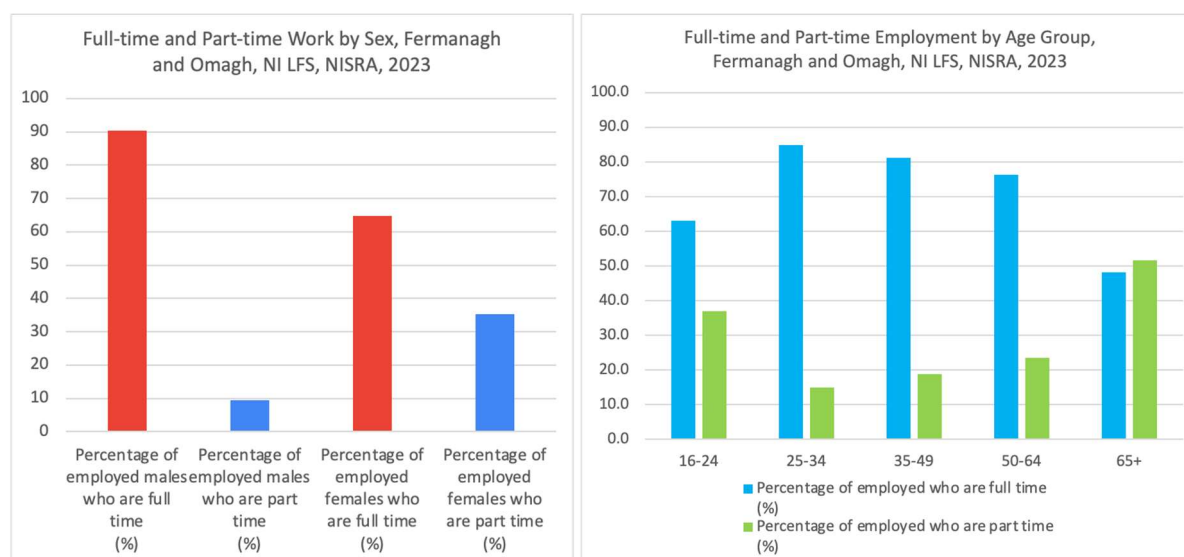
Figure 10: FODC Labour Force Participation, Working Age (16-65 years) Population



Source: UK Census, 2021.

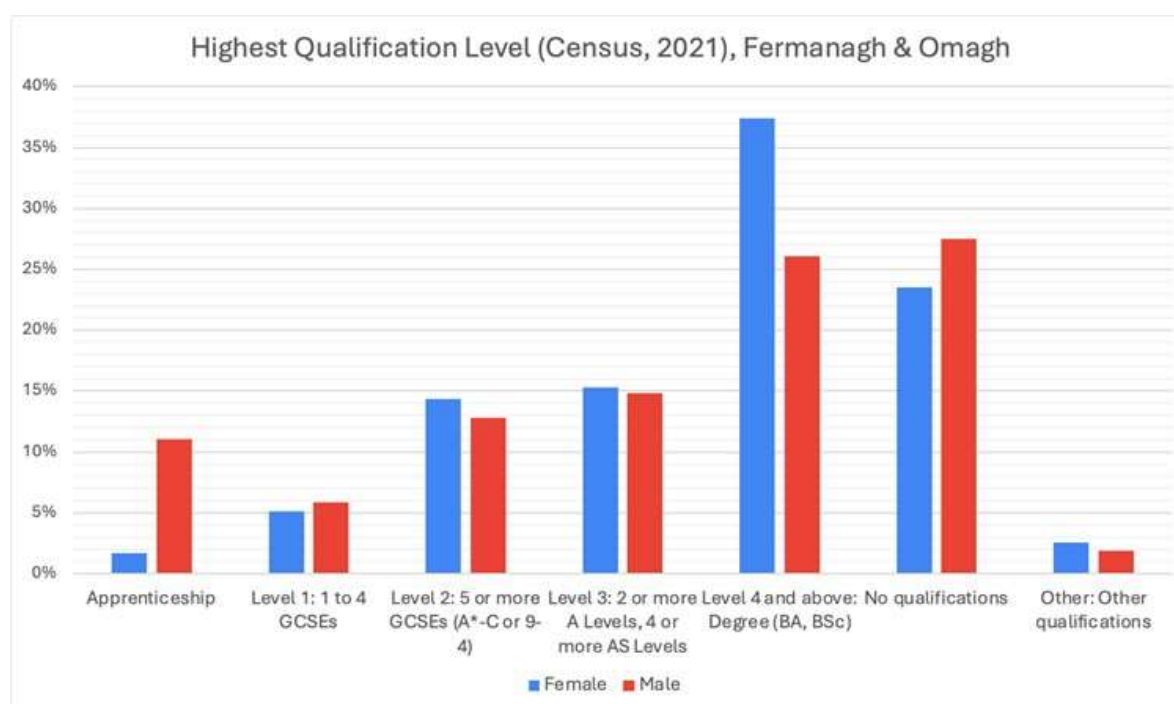
When we focus on the working-age population using the Labour Force Survey (for 16-64 year olds), we see further gender disparities, see Figures 11. While over 90% of men employed in Fermanagh and Omagh work full-time, only 65% of women work full-time and around 35% work part-time; this is only slightly above the NI average (34.6%). Part-time work is concentrated in the older age groups (over 50% of part-time workers), however, there are also many in the 16-24 group, indicating part-time work during study. FODC is slightly above the NI average in terms of the proportion of the population who are disabled and economically inactive, this would suggest a greater emphasis on flexible work options.

Figures 11: Employment Type (a) and Age (b)



Source: Northern Ireland Labour Force Survey, 2023, NISRA.

Figure 12: Fermanagh and Omagh Highest Qualification Level, Total Population



Source: ONS (2021) Census.

Moving on to educational attainment and qualifications, Figure 12 outlines the breakdowns of these levels by sex in Fermanagh and Omagh. Firstly, while men make up the vast majority of those having apprenticeship qualifications, women in Fermanagh and Omagh are much more likely to have level 4+ Regulated Qualifications Framework (RQF) qualifications (degree and above) at 37% compared with 26% for men, men are also more likely to have no

qualifications, see Figure 13. This gap is most pronounced for women working as managers or directors (65% versus 45% for men), and in professional occupations (94% versus 85% for men). Despite this, women are often concentrated in occupations that have skill requirements below their qualification level, for instance in associate professional and technical occupations, skilled-trades or caring, leisure or service occupations. For a detailed breakdown of this, see Appendix A1. In terms of the male population in Fermanagh and Omagh, the lack of qualifications are linked primarily to the age group and sector of the employee. In agriculture for instance, around 29% of employees have no qualifications, most of whom are either in the 55-64 or 65+ years age groups.

This analysis has several key takeaways for understanding human capital potential in the area. Firstly, economic inactivity (including retirement and schooling) in the area is primarily a reflection of age and the rural dynamics and is similar to rural districts, such as Causeway Coast and Glens. However, there are still gaps in terms of economic inactivity of working-age women in FODC as around 65% of working-age women are employed compared to the 71% NI average (NI LFS, 2023); this is also in part due to a slightly higher female unemployment rate of 3.2% in Fermanagh and Omagh.

In terms of the mismatch between the highest qualification attained by women and the current occupation in which they work in, this is often associated with an underutilisation of skill and has been linked to lower productivity, see Scottish Government (2008). While this is a difficult and long-term problem to address, as it relies on the creation of equivalent skilled jobs, there are business and skills support programmes which have been trialled in the UK to address in-work skills gaps within businesses, which can better respond to the current skills demand.

To give some examples of in-work skills development programmes, the European Social Fund⁴¹ funded the 'Skills for Growth' programme in a number of UK regions, such as Greater Manchester, the North East and Tees Valley. While these programmes were implemented with a high-degree of autonomy, they focused on several key dimensions of job, business and skills needs and how to address these with funded-training programmes. For instance, the Greater Manchester programme operated by growth hubs, engaged with businesses across the region to establish workforce development plans, focusing on individual or groups of employees and potential skills gaps, and training needs. They then prioritised funding for training programmes, working with training providers, and tracked employees as they went through the planning and training process. Independent survey results of the respondents demonstrated increases in the job performance of employees.

Another programme focused on the same ambition, in the North East of England, is similar to this model, albeit with more attention to green and creative industry skills. This programme has more scope for collaboration with local higher-education institutes. Similarly, the Tees Valley programme also engaged in workforce skills planning, funded options for training, and

⁴¹ The European Social Fund was also in operation in NI, see <https://www.economy-ni.gov.uk/articles/northern-ireland-european-social-fund-programme-2014-2020>

apprenticeship funding support. These programmes were tailored to local skills development plans and strategies, with a blend of online and face-to-face learning.

Overall, the advantages of these programmes is to respond to the immediate skills needs of the local business population, by planning in collaboration, and addressing local provision gaps, they are more flexible and can plan for potential future shortages, such as in green or retrofit skills. In turn, this improves individual-level outcomes for employees in terms of skills utilisation, and has the potential to boost firm-level productivity.

The occupation shares in Fermanagh and Omagh are largely similar to that of NI as a whole in terms of the shares of those in managerial and professional jobs, see Table 9. However, it important to note that there is a gap in terms of the proportion of those with higher level qualifications (58.7%) and those going into those jobs (around 43%) – this means that there is a potential productivity loss through skills underutilisation in existing jobs in the area, and attrition of higher educated individuals to other areas. Improvements to upskilling the existing workforce through employer or government-funded training, work/job redesign and planning as well as improving aspects of job quality may improve access to more secure, higher paid and more rewarding jobs for residents. In turn, creating more high-quality jobs with better career prospects may attract outside talent as well as retaining the talent of the local population.

Table 9: Northern Ireland and Fermanagh and Omagh, Occupational Group Shares

Occupation Groups (SOC 2020)	NI Average %	Fermanagh & Omagh %
1 Managers, directors and senior officials	↑ 9.0%	↓ 8.1%
2 Professional occupations	↑ 20.3%	↓ 18.3%
3 Associate professional and technical occupations	↑ 9.6%	↓ 7.6%
4 Administrative and secretarial occupations	↑ 11.1%	↓ 9.2%
5 Skilled trades occupations	↓ 12.8%	↑ 18.3%
6 Caring, leisure and other service occupations	↓ 10.4%	↑ 10.8%
7 Sales and customer service occupations	↑ 9.3%	↓ 9.0%
8 Process, plant and machine operatives	↓ 7.6%	↑ 9.0%
9 Elementary occupations	↑ 9.9%	↓ 9.6%

Source: NI Census UK Data, 2021. Fermanagh and Omagh arrows relative to NI Average %.

When we combine the two previous statistical breakdowns to show propensity of education attainment (skill levels) between occupations, we find that overall Fermanagh and Omagh is close to the Northern Ireland average in terms of the coverage of the resident population with RQF level 4+ qualifications (NI = 60.1%, FO = 58.7%, Census 2021).

In Table 10 we can observe the breakdown of occupations by the level of qualifications individuals working in them have obtained in Fermanagh and Omagh. Higher managers and professional occupations have very high levels of qualifications, which is generally the trend due to the skill requirements of those jobs, mainly through formal accreditation of professional occupations such as accountancy or legal practice. However, when we consider

other occupations which provide in-person services, such as skilled trades, those working in agriculture, cleaning staff, logistics workers, we see much higher levels of individuals with no formal qualifications. While this may not be a barrier to the completion of work tasks, it is a barrier to both personal development of workers but also of firm-specific human capital accumulation, in which workers progress through different levels of organisations and enhance the productivity of firms, products and services.

Table 10: Fermanagh and Omagh Skill Levels (Qualifications) within Occupations

SOC 2020	Has qualifications	No qualifications
1 Managers, directors and senior officials	91.5%	8.5%
2 Professional occupations	99.3%	0.7%
3 Associate professional and technical occupations	97.2%	2.8%
4 Administrative and secretarial occupations	96.0%	4.0%
5 Skilled trades occupations	79.5%	20.5%
6 Caring, leisure and other service occupations	91.5%	8.5%
7 Sales and customer service occupations	87.7%	12.3%
8 Process, plant and machine operatives	70.3%	29.7%
9 Elementary occupations	72.4%	27.6%

Source: NI Census UK Data, 2021.

Human capital indicators from the data tool are in the Appendix in Table A5. Fermanagh and Omagh are below the NI and UK medians for the employment rate and the proportion of the population with level 3 skills or above in 2023. The dependency ratio⁴² is higher than the medians and the second highest district in Northern Ireland after Ards and North Down. Fermanagh and Omagh's population is above the NI median for healthy life expectancy (female and male combined) but below the UK median. The proportion of adults who smoke⁴³ in Fermanagh and Omagh is higher than the NI and UK medians, the second highest LGD after Belfast. When ranked with rest of UK local authorities FODC scores 313/361 for human capital in the lowest 20%.

Natural Capital

Natural capital refers to a place's stock of natural resources and ecosystems that provide a wide range of valuable services and products for humanity. According to the HM Treasury Green Book, it encompasses everything from the quality of the air, the quality of the water, the fertility of the soil, as well as vital ecosystems such as forests, wetlands, oceans and rivers. These assets can provide economic and social value either through their produce (such as

⁴² The dependency ratio of an area is defined as the ratio of non-working age population to working age population, taken from the 2021 census. Working age is defined as 16-64 years.

⁴³ The inverse is used in the indicator of 100 less this percentage.

from forests), or from the services that they provide (such as recreational space), or from the inherent value that is placed on them by local citizens (such as biodiversity).

While DLUHC (2022, p. 59) makes reference to the capitals framework of Coyle (2019), it excludes natural capital. The importance of natural capital is stressed by The Wealth Economy Project at the Bennett Institute, as the prosperity of a place depends on “our ability and freedom to live in a peaceful, trusting society, a safe and stable climate and healthy ecosystems” (Coyle, 2019, p.10).

The relationship between environmental sustainability and productivity growth is not straightforward. On the one hand, productivity growth appears to entail an increase in resource consumption, development of green space, and prioritising the accumulation of more equipment over ‘green’ technology that is often more expensive. On the other hand, climate change poses significant challenges to productivity, as rising temperatures and extreme weather events disrupt economic activities, damage infrastructure, and reduce labour productivity (Dietz and Stern, 2015; Howard and Sterner, 2017; Pörtner, et al, 2023). Moreover, the depletion of natural assets can severely impact wellbeing by removing the services that individuals get when they are close to nature. This apparent trade-off between productivity and the environment has even led some to suggesting that “degrowth” in the economy is the only way to ensure overall sustainability (Hickel et al., 2022).

Alternatively, research suggests that it is possible to “decouple” productivity growth from environmental degradation (Pilat, 2024). This involves implementing policies that encourage firms to increase the value derived from existing resources whilst also reducing CO₂ emissions (Pilat, 2023). Chiefly, this requires encouraging the usage of equipment and products that place a lower burden on the environment – examples include renewable energy, goods that are fully recyclable, and energy-saving insulation. However, in order to transition to an economic structure that is sustainable overall, these economic products and activities need to be able to outcompete the less sustainable alternatives.

Innovation policies can enable this transition by working to remove the barriers to development, adoption, and diffusion of these technologies. Such policies include direct funding for R&D, promoting the human capital investments that are required to engage in innovation, and building connections between firms and research organisations. The importance of these connections cannot be understated – as Jones (2022) puts it, “information may move at the speed of light, but know-how moves with people”. Indeed, a lack of connectivity with the wider national and international innovation system can be a key barrier to the adoption of more sustainable technologies.

Aside from innovation, many policy areas have serious implications for the sustainability agenda. Key to ensuring that policymakers can prioritise and design policies in a way that is consistent with addressing climate change lies in the integration of natural capital accounts within economic policymaking. Natural capital accounts cover the assets and services provided by nature within a place. Natural capital can cover the value provided by nature regarding the goods that it provides, the recreational activities it enables, and the wellbeing it causes through ambient presence. The ONS (2024h) estimates that the health benefits from recreation in nature is valued at £489bn in 2022. The total asset value of ecosystem services

was estimated to be £1.8 trillion in the UK in 2022 (within this Northern Ireland is value of ecosystem services is £36 billion). In part, these estimates were formed using shadow prices - estimated prices where no market price exists - and environmentally adjusted measures which aim to capture the true cost and value of natural resources. This approach not only supports more sustainable management of the resources in a place but also ensures that productivity gains are aligned with environmental goals.

The natural capital of the area has been utilised for a number of tourist attractions including Fermanagh Lakelands, Cuilcagh Marble Arch Caves (a site within the Cuilcagh Lakelands UNESCO Global Geopark) and Omagh Sperrin's Area of Outstanding Natural Beauty⁴⁴. According to the ONS (2021), FODC has the highest share of woodland coverage of the NI local government districts at 13.2% in 2019.

We examine data on natural capital indicators in the experimental data tool in the Appendix, Table A6. The indicators show the territorial greenhouse gas emissions for each sector of the economy and are from the Department for Energy Security and Net Zero (DESNZ, 2024). The greenhouse gas emissions are measured in kilo tonnes of carbon dioxide equivalent (kt CO₂e). The category for Land Use, Land-Use Change and Forestry (LULUCF) covers the net emissions from land classes including: forest land; cropland; grassland; wetlands; settlements, other land and the pool of harvested wood products. The DESNZ (2024) report presents the emissions per capita and per square kilometre. To create the index each of the sectors are divided by land area in square kilometres before standardising.

The natural capital results in Table A6, when scaled by square kilometres, show that Fermanagh and Omagh ranks highest of the Northern Ireland districts at 194/361 (out of all UK local authorities), with Belfast the worse performing in the index (348/361). The Department for Economy (2024) Sub-regional Economic Plan states that Fermanagh and Omagh has the highest amount of greenhouse gas emission when scaled by population. Fermanagh and Omagh has the highest emissions for the agricultural sector in Northern Ireland but it does employ 4% of workers, contribute 7% of GVA and (see Table 4 and 5) and this is a tradeable sector which will be consumed in and beyond the district. The high level of emissions from transport corresponds with Fermanagh and Omagh having the highest km of roads than any other district⁴⁵. The Department for Economy (2024) state that Fermanagh and Omagh is the largest contributor to renewable electricity generation in Northern Ireland. It notes that Fermanagh and Omagh generated around 24.4 MW/h per household, about 32% more than the next best performing district.

4. Qualitative Analysis

We used a mixed methods approach to deepen our understanding on how some of the most abstract and difficult to quantify elements of the capital's framework were being thought about in practice. We envisaged that the qualitative analysis would help to inform our

⁴⁴ See <https://www.fermanaghlakelands.com/>, <https://marblearchcaves.co.uk/> and <https://exploreomaghsperrins.com/>.

⁴⁵ See <https://www.infrastructure-ni.gov.uk/publications/northern-ireland-road-network-and-condition-statistics-2022-23>

understanding of how the capitals of social, institutional and intangible were thought about in practice. However, we did not exclude the other capitals of physical, financial, human and natural and all seven capitals have been included in this analysis.

In addition to gaining insights into how the capitals are understood across a range of stakeholders, we are also interested in the interdependencies across the capitals. The experience in Fermanagh and Omagh will be used to form the basis of this initial understanding. It is important to emphasise however that these indicative findings reflect the experience of participants in Fermanagh and Omagh. As such, the analysis in the Fermanagh and Omagh report is place specific rather than generalisable.

Methods

We used three qualitative methods to broaden our understanding of how key stakeholders in Fermanagh and Omagh are thinking about the capitals. These included (1) a baseline survey that asked for both descriptive responses as well as ranked responses; (2) a stakeholder workshop, where key actors from across Fermanagh and Omagh shared their views on the capitals in relation to their experience or working in the town; and (3) semi-structured interviews, where participants were asked questions with a particular emphasis on institutional and social capital.

Participants were selected based on two main criteria. First, their professional experience needed to align with one of the capitals, while acknowledging some overlap across others. Second, they were chosen based on the strategic relevance of their organisation to the Fermanagh and Omagh area. We gained insights from a broad and diverse range of key stakeholders working in the district and across different organisations, sectors and levels of seniority. This included participants from schools; further education; higher education, local government; the business community; the community, voluntary and social enterprise sector; tourism; civic society; finance; and environment sectors.

Stakeholder's Workshop and Survey Results

In May 2024, the IPPC project team held meetings with various public and private stakeholders in Enniskillen and Omagh to discuss each of the seven capitals in a group setting with separate workshops held in Enniskillen and Omagh. A brief Qualtrics survey on productivity and the capitals was completed by participants at the start.

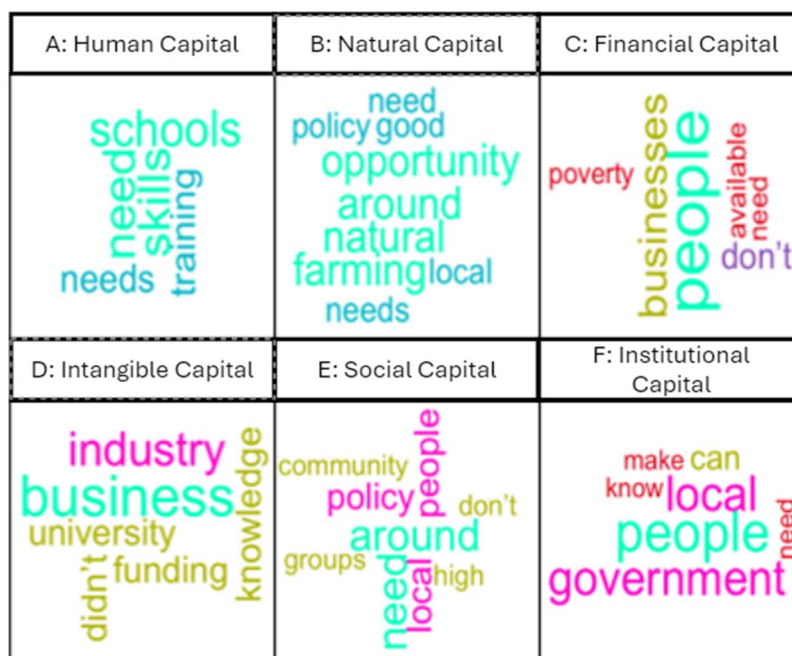
A 'word cloud' package was then used to visualise the most frequent keywords from the various discussions.⁴⁶ The strength of this textual analysis is to understand how dominant themes emerge in the form of keywords across different discussions within the seven capitals. Figure 13 with visual panels A-F with the keywords from each 10-minute discussion (physical capital is not included here but is captured within Figure 14 that shows the result of both the workshops). Firstly, regarding the **human capital** discussion. This dialogue focuses mainly on

⁴⁶ For a detailed discussion, see <https://cran.r-project.org/web/packages/wordcloud/wordcloud.pdf>. A range of 'stopwords' was employed to avoid muddling the important themes with common language and functional words, such as 'and', 'but', 'the' etc..

education-specific themes, such as “skills”, “schools” and “training”. As shown in B, within **natural capital** “farming” is a dominant theme along with “opportunity”.

Panel C depicts **financial capital**, as seen in A, there is a more direct and personal focus highlighted by words such as “people”, “poverty”, “available” and “need”, expressing individual struggles with individual financial security and debt. The issue of firm access to finance and investment is noted by references to “businesses”. These two central themes emphasise anxiety or inability to gain access to either individual or commercial financing, and to maintain financial stability in the case of personal finance. In terms of **intangible capital** (D), the discussion amongst local stakeholders is close to the academic understanding of the topic with its relevance to “business” predominant, along with “industry”, “knowledge”, “university” and “funding”.

Figure 13: Word-cloud by Capital from the Stakeholder’s Workshop



Within visual E “around” and “need” are a dominant theme in the discussion on **social capital**. Again, there is a reference to the personal element of “people” as well as “policy”, “local”, “community” and “group”. On **institutional capital**, visual F explains how stakeholders link “people” with issues relating to “local” and “government”.

The final word clouds bring these themes together in Figure 14 with a visual that is a compilation across all discussions. The most common themes are arranged by: “people”, “need” and “community”, and these all relate to a social understanding of the local resident population as a cohesive group. Secondly, the financial aspect of local governance is clearly a dominant theme, expressed by “investment”, “business[es]” and “funding”. Other smaller themes in the discussion include “skills”, “work”, “productivity” and “credit”.

This analysis is key to appreciating the way in which stakeholders, who implement a range of policies and services on the ground in local areas, understand concepts and methods which are used to design national policies in the wider framework.

Figure 14: Capitals' Word-cloud from the Stakeholder's Workshop



Interviews

This section of the report includes insights gained from the interviews that will be important to support partners across Fermanagh and Omagh. It is based on the analysis of eight semi-structured interviews.

Interview Objectives:

- A. To gain insight into how the participants make decisions, who they consult, what they prioritise, where they seek assistance, and what they may require assistance or advice on.
- B. Explore participants' experiences and perspectives related to both productivity and investment planning.
- C. Identify common themes and patterns in participants' responses.

Broad Research Questions:

1. What are the key factors influencing strategy and investment planning from the perspective of participants?
2. How do participants think about productivity in their working lives?
3. Are there common challenges or opportunities related to productivity and investment reported by participants?

Questions were designed with an emphasis on social and institutional capital. Interviews were carried out online and lasted for one hour. Data was captured by notes and audio recordings, and each interview has a typed verbatim transcript. From this, there were two analytical approaches taken. Firstly, accounts that related to a specific capital/s were grouped, to see patterns in the types of things that were being discussed in relation to the capitals. This was then analysed in relation to links across the capitals. Secondly, themes were generated that described common challenges, concerns and strengths that were evident in the accounts that participants shared. These have been condensed into three core categories that provide insights across the capitals with a particular focus on **social and institutional** capital and are detailed in the section titled *themes*.

An overview of the interview findings

The qualitative data highlights the importance of taking a holistic approach that considers different forms of capital, such as human, social, and institutional capital, rather than focusing solely on skills and job creation.

Collaboration was viewed by all interviewees as crucial, and positive examples were shared that were taking place and having a positive impact across the area. There were also complexities and challenges noted with several potential implications.

Political instability and the legacy of the region's history have created challenges in developing a cohesive narrative to attract investment, with divisions and changing government priorities hindering progress on key infrastructure and skills issues. Whilst there are strong county-level identities, considering the combined strengths of Fermanagh and Omagh would make for a more compelling narrative for attracting investment and also showing the impact of investments across the wider area. This broader scale context may also be a more attractive proposition to future investors. It was felt that a more balanced and realistic evaluation of the district's strengths and weaknesses, while avoiding overly idealistic perspectives, would also support the creation of a stronger narrative.

However, the resilience and problem-solving abilities of regional actors from local government, industry and other key stakeholders appear to be a key enabling factor. There is a consistent "can do" pro-active attitude that appears to be a strength for the area, enabling many positive changes, despite numerous external challenges.

The Themes

This section will elaborate on the three dominant themes raised during the interviews. Each theme has a short description including recommendations.

Theme one: Create a cohesive place-based identity

Capitals Interplay: Social and institutional

Recommendation: Jointly create and share a narrative that has a common purpose

There is still greater clarity needed in creating a cohesive narrative and identity for the district. There are a number of assets that can be drawn on to do this, but they are not currently aligned. There needs to be **a unified story of place and its future direction**. This would bring together the key resources, features and strengths within the area. In so doing, this narrative would articulate the collective values of the area that are both meaningful to residents and encourage them to stay, whilst also resonating with investors and attracting new residents and businesses. This narrative would need to be forward-looking, acknowledging the past but not being constrained by it.

Theme two: Balancing regional and national perspectives

Capitals Interplay: Financial, social and institutional

Recommendation: Accelerate business support programmes (MSW growth deal)

Create an investment proposition for the district that aligns the assets.

There were some concerns around connecting local policy into Northern Ireland's priorities and agendas and challenges around balancing regional nuances with a national perspective.

New narratives should consider the broader regional context beyond individual districts, to counter investment and resources being heavily skewed towards the eastern part of Northern Ireland, to the detriment of other areas, this is now a priority of the NI Executive and the Department for the Economy.

There were some initiatives that were seen to be benefiting cooperation and collaboration including dedicated funding programs such as PeacePlus and the Shared Island initiative, which harnesses the full potential of the Good Friday Agreement to enhance cooperation, connection and mutual understanding on the island and engage with all communities and traditions to build consensus around a shared future.

Theme 3: Economic Expansion and Trade development

Capitals Interplay: Financial and institutional

Recommendation: encourage more cross-border collaboration

Many interviews identified the role of trade in supporting economic development, highlighting the importance of cross-border collaboration, data-driven decision-making, and a holistic approach to strengthening different forms of capital. Collaboration was seen as crucial, involving internal departments, government agencies, councils, and businesses to align strategies and gather data.

There is a focus on enabling growth-oriented businesses to access the right types of capital and business support. There are examples of successful transformative and ambitious initiatives that are addressing regional skills gaps, talent retention and regeneration of high streets. This includes the Omagh Enterprise Digi-Hub where Levelling Up Funding has been utilised to re-purpose a disused building. Capital investment was seen as key to creating this level of truly transformative intervention.

There appear to be some gaps in the financing landscape with some efforts made by key actors to increase collaboration with local stakeholders in order to ensure capital is deployed across the region, not just concentrated in Belfast. Challenges include ensuring sufficient absorptive capacity and integrating the new funds with existing provisions. This is an area of development, but also an opportunity to build stronger partnerships and ecosystems across the business community.

5. Summary and Recommendations

Fermanagh and Omagh has a higher level of productivity (GVA/ hour) than Northern Ireland and larger change over time between 2008-2022, therefore it has been “steaming ahead” relative to the Northern Ireland average. We compare the drivers of productivity in Fermanagh and Omagh to Northern Ireland and find that export intensity is well above the Northern Ireland level with benefits from bordering the Republic of Ireland. We present an experimental data tool which includes indicator variables that represent physical, social, financial, human and natural capital for the Northern Ireland Local Government Districts. Fermanagh and Omagh ranks highly for social capital and is in the top 15% in the UK reflecting the strong community support network in the district.

In the Executive Report, accompanying this report, the first table notes Fermanagh and Omagh’s barriers to productivity, what needs to be transformed and the recommendations to be actioned over the short, medium and long-term. To overcome the challenges in Fermanagh and Omagh and improve productivity we recommend the following:

Continue to work on common purpose across the district. Political instability and the legacy of the region’s history have created challenges in developing a cohesive narrative to attract investment, with divisions and changing government priorities hindering progress on key infrastructure and skills issues. In the short-term FODC should develop an investment proposition for the district. A cohesive narrative is needed emphasising the strong social and natural capital base of the district. In the medium-term a unified story of place and future direction will help share the narrative for long-term investment.

Improve economic outcomes: with the strength of FODC’s export sector, in the short-term more cross-border co-operation and collaboration should be encouraged (continuing with schemes like the PeacePlus and the Shared Island initiatives). In the medium-term the Mid South West Economic Engine growth deal proposals should be pursued as they encourage investment in innovation to increase future jobs and improve connectivity. Continue support for green industries and renewables with progress to Net Zero. Further high-quality capital investment needs to be attracted to the area, particularly in infrastructure (more capacity on the roads is needed along with investment in a train line planned to Omagh⁴⁷). FODC should help to secure industrial land for business growth. In the long-term, business can form partnerships with regional universities and the South West College to support and drive innovation and research collaborations, particularly in tradeable sectors.

Enhance well-being outcomes: in the short-term FODC should continue to advocate for investment in childcare provision through the introduction and delivery of the Northern

⁴⁷ All Island Strategic Rail Review: <https://www.infrastructure-ni.gov.uk/articles/all-island-strategic-rail-review>

Ireland Early Learning and Childcare Strategy. The implementation of FODC's Pathways out of Poverty strategy needs to be supported, along with examining available and emerging data sources to inform decisions. In the medium-term FODC should work with industry and other partners to develop and deliver low-carbon solutions. FODC should continue to invest in tourism branding and recognise the strength of the natural assets that would support the transformation of the Fermanagh and Omagh District into a regenerative tourism destination, whereby the aim is to leave the location in a better place than you found it. This would involve working with communities and linking various stakeholders to opportunities across the district. In the long-term FODC could share real-life business stories to inspire others and inform policy.

Improve welfare outcomes for citizens: in the short-term encourage female entrepreneur/network programmes and increasing childcare places. Provide apprenticeships in emerging industries and work in partnership with local businesses to support retention of young people within the district offering better quality jobs. In the medium-term improve life-time training offer. In the long-term promote and support social enterprise as a key driver of inclusive economic growth and community wellbeing.

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Appendix A1: Northern Ireland Districts Capitals Data Tool Tables

Table A1: Northern Ireland Local Government Districts Abbreviations

Abbreviation	District
FO	Fermanagh and Omagh
AN	Antrim and Newtownabbey
ABC	Armagh City, Banbridge and Craigavon
BCC	Belfast City Council
CCG	Causeway Coast and Glens
DCS	Derry City and Strabane
LC	Lisburn and Castlereagh
MEA	Mid and East Antrim
MU	Mid Ulster
NMD	Newry, Mourne and Down
AND	Ards and North Down

Experimental Data Tool Output for Northern Ireland Districts

The following tables compare Fermanagh and Omagh to the rest of the Northern Ireland districts on the basis of indicator data at the local authority district level for the whole of the UK from the ONS (2025c). The variables are grouped into indicators for the capitals of physical, social, financial, human and natural. At this stage we do not have a consistent set of variables across the UK for institutional and intangible capital.

Table A2: Physical Capital Indicators in the Northern Ireland Districts

Districts	Median House Prices (£), 2024	Electricity Consumption (kwh/meter), 2023	Broadband availability (Gb), 2024	Households Private Rental (%), 2021/2	Population Density (resident/km sqrd), 2021/22	Supermarkets (per 10,000 population), 2023	UK Rank
FODC	174,113	3257.8	86.1	18.5	40.79	4.54	187
AN	196,678	3207.8	95.6	13.9	255.03	3.36	232
ABC	169,407	3379.0	91.8	18.6	163.41	2.88	201
BCC	177,366	2706.4	95.6	20.5	2508.17	3.65	164
CCG	212,379	3172.8	88.7	17.9	71.39	4.09	193
DCS	169,866	3045.5	92.8	17.9	120.49	3.18	253
LC	222,496	3296.7	95.2	11.2	294.8	2.48	272
MEA	174,048	3213.8	93	16.1	131.22	3.45	228
MU	180,517	3610.1	89.3	18.9	82.07	3.46	146
NMD	201,305	3524.1	91.4	18	108.23	2.91	163
AND	215,948	3201.0	95.1	13.4	288.91	2.75	255
UK Median	277,547	3315.9	83.7	17.3	567.73	2.71	
NI Median	180,517	3213.8	92.8	17.9	131.22	3.36	
Productivity Correlation:							
NI (N=11)	-0.02	-0.17	0.21	-0.23	0.18	0.22	
UK (N=361)	0.49	0.24	0.1	0.19	0.22	0.22	

See Table A1 for the list of abbreviations for Northern Ireland local government districts and Table A2 for the list of the variable sources.

Table A3: Social Capital Indicators in the Northern Ireland Districts

Districts	Children in relative poverty (%), 2023	Population Change (%), 2011-2021	Museums (per 100,000 population), 2021	ONS well-being survey 2022/23			UK Rank
				Anxiety	Happiness	Life satisfaction	
FODC	19.9	3.1	7.7	2.33	7.72	7.73	47
AN	16.9	4.9	2.06	3.45	7.53	7.63	177
ABC	19.4	8.7	7.77	2.85	7.67	7.79	46
BCC	23.1	3.3	5.5	3.31	7.09	7.21	313
CCG	21.2	0.6	4.94	3.11	7.61	7.74	164
DCS	21.7	2	3.32	3.44	7.28	7.37	290
LC	12.8	9.6	2.68	2.66	7.68	7.67	29
MEA	18.2	2.6	7.16	2.81	7.88	7.75	54
MU	18.7	7.8	6.65	2.24	7.95	8.04	4
NMD	22.3	5.8	2.2	2.49	7.77	7.7	58
AND	15.2	4.3	3.67	3.05	7.66	7.78	75
NI Median	19.4	4.3	4.94	2.85	7.67	7.73	
UK Median	18	5.2	4.02	3.25	7.42	7.48	

Productivity Correlation:							
NI (N=11)	-0.28	-0.15	-0.12	0.03	-0.01	-0.05	
UK (N=361)	-0.35	0.22	0.12	-0.15	-0.07	-0.005	

Table A4: Financial Capital Indicators in the Northern Ireland Districts

Districts	Prosperity, GDP per capita (£), 2022	GDHlph (£), 2022	Gross Median Weekly Pay (£), 2023	Businesses births (%), 2023	High growth Business (%), 2023	UK Rank
FODC	26414	18127	506.8	7.08	2.00	360
AN	29490	18925	559.7	8.47	2.97	344
ABC	24299	18389	542.5	8.24	3.09	349
BCC	49821	18276	621.9	9.74	4.36	228
CCG	21363	18911	501.4	7.39	1.94	358
DCS	26204	17520	533.7	8.06	1.85	357
LC	29637	20450	572.2	7.52	2.48	353
MEA	23369	18813	551.4	10.34	1.15	352
MU	31467	18468	550.3	7.10	2.63	355
NMD	23482	18073	512.1	8.18	3.90	347
AND	17635	20166	459.2	8.17	4.04	351
NI Median	26204	18468	542.5	8.17	2.63	
UK Median	29380	21359	603.8	10.41	4.22	
Productivity Correlation:						
NI (N=11)	0.34	0.15	0.24	-0.03	-0.09	
UK (N=361)	0.28	0.47	0.54	0.14	0.33	

See Table A1 for the list of abbreviations for Northern Ireland local government districts and Table A2 for the list of the variable sources.

Table A5: Human Capital Indicators in the Northern Ireland Local Government Districts

Districts	Employment Rate (%) in 2023	Skills (RQF level 3+) in 2023	Dependency Ratio in 2021	Healthy Life Expectancy, 2018-20	Cigarette Smokers (%) in 2023	UK Rank
FODC	70.6	56.4	0.66	62.67	15.4	313
AN	78.5	64	0.6	61.28	10.5	190
ABC	76.6	57.3	0.61	63.02	15.3	255
BCC	67.9	60.9	0.51	58.17	16.1	320
CCG	68.3	56.9	0.63	61.63	12.2	321
DCS	65.4	57.1	0.59	61.22	14.7	337
LC	77.8	70.3	0.61	66.35	10.1	131
MEA	79.5	57	0.62	60.55	12.9	232
MU	74.9	60.9	0.61	61.95	12.7	260
NMD	78.8	57.4	0.63	62.55	11.5	196
AND	75.5	59.8	0.67	63.55	11.5	221
NI Median	75.5	57.4	0.61	61.95	12.7	

UK Median	76.5	60.35	0.62	63.41	11.4	
Productivity Correlation:						
NI (N=11)	0.04	0.06	-0.13	-0.25	-0.2	
UK (N=361)	0.22	0.26	-0.32	0.32	-0.24	

Table A6: Natural Capital Indicators: Greenhouse gas emissions by sector, 2022

Districts	Industry	Commercial	Public Sector	Domestic	Transport	Agriculture	Waste	LULUCF Net Emissions	UK Rank
FODC	114.4	17.5	7.3	233.2	365.9	999.6	74.0	454.7	194
AN	86.1	36.0	28.1	276.7	329.0	277.6	88.7	25.5	203
ABC	229.8	39.1	24.6	411.5	489.2	848.0	79.5	124.4	264
BCC	173.9	164.7	118.9	539.5	303.5	20.8	226.9	83.8	348
CCG	65.7	41.4	14.3	293.6	349.2	715.1	49.2	378.1	215
DCS	234.4	39.6	33.6	282.8	243.3	415.4	41.5	343.6	236
LC	113.7	48.2	38.4	281.7	283.4	244.8	171.8	30.1	253
MEA	141.5	13.1	5.4	274.3	269.3	463.9	75.8	128.8	233
MU	461.5	19.0	5.4	257.0	373.9	945.8	21.2	250.0	241
NMD	95.7	19.1	9.7	331.2	425.7	711.6	21.0	164.1	214
AND	46.7	35.9	12.7	341.3	186.9	236.4	93.1	198.4	270
NI Med.	114.4	36.0	14.3	282.8	329.0	463.9	75.8	164.1	
UK Med.	75.8	66.6	23.2	188.3	263.0	44.8	38.1	0.2	
Prod. Corr.:									
NI (N=11)	0.16	0.06	0.1	-0.29	-0.57	-0.33	0.18	-0.1	
UK (N=361)	-0.05	0.29	0.07	-0.05	-0.004	-0.17	-0.01	-0.02	

See Table A1 for the list of abbreviations for Northern Ireland local government districts and Table A2 for the list of the variable sources.

Source: DESNZ (2024). Greenhouse gas emission estimates in kt CO₂e.

Appendix A2: Labour Market Statistics

UK Census Data, Occupation, Qualification Level and Gender, Fermanagh and Omagh, 2021, ONS

Occupation and Qualification Structure, Fermanagh and Omagh, Census, 2021

SOC Major Group (2020)	Female %	Male %
1 Managers, directors and senior officials	100.0	100.0
Apprenticeship	1.3	8.5
Level 1: 1 to 4 GCSEs	2.7	5.5
Level 2: 5 or more GCSEs (A*-C or 9-4)	11.3	11.8
Level 3: 2 or more A Levels, 4 or more AS Levels	15.2	16.8
Level 4 and above: Degree (BA, BSc)	64.6	45.0
No qualifications	3.9	11.0
Other: Other qualifications	1.0	1.4
2 Professional occupations	100.0	100.0
Apprenticeship	0.2	2.1
Level 1: 1 to 4 GCSEs	0.5	1.1
Level 2: 5 or more GCSEs (A*-C or 9-4)	1.7	3.0
Level 3: 2 or more A Levels, 4 or more AS Levels	3.4	7.3
Level 4 and above: Degree (BA, BSc)	93.6	85.3
No qualifications	0.4	1.1
Other: Other qualifications	0.2	0.2
3 Associate professional and technical occupations	100.0	100.0
Apprenticeship	0.5	4.9
Level 1: 1 to 4 GCSEs	1.4	3.5
Level 2: 5 or more GCSEs (A*-C or 9-4)	6.9	10.4
Level 3: 2 or more A Levels, 4 or more AS Levels	15.5	20.2
Level 4 and above: Degree (BA, BSc)	74.0	56.1
No qualifications	1.2	4.1
Other: Other qualifications	0.5	0.9
4 Administrative and secretarial occupations	100.0	100.0
Apprenticeship	0.7	2.8
Level 1: 1 to 4 GCSEs	5.2	4.1
Level 2: 5 or more GCSEs (A*-C or 9-4)	22.2	13.8
Level 3: 2 or more A Levels, 4 or more AS Levels	22.9	24.8
Level 4 and above: Degree (BA, BSc)	43.7	48.8
No qualifications	3.7	5.0
Other: Other qualifications	1.7	0.7
5 Skilled trades occupations	100.0	100.0
Apprenticeship	5.4	19.7
Level 1: 1 to 4 GCSEs	6.7	6.4
Level 2: 5 or more GCSEs (A*-C or 9-4)	18.7	12.5
Level 3: 2 or more A Levels, 4 or more AS Levels	23.2	22.4
Level 4 and above: Degree (BA, BSc)	26.7	16.3
No qualifications	17.2	20.8
Other: Other qualifications	2.1	2.0

6 Caring, leisure and other service occupations	100.0	100.0
Apprenticeship	2.2	6.4
Level 1: 1 to 4 GCSEs	3.7	5.6
Level 2: 5 or more GCSEs (A*-C or 9-4)	13.4	16.7
Level 3: 2 or more A Levels, 4 or more AS Levels	35.1	25.1
Level 4 and above: Degree (BA, BSc)	36.2	31.5
No qualifications	7.7	13.2
Other: Other qualifications	1.6	1.5
7 Sales and customer service occupations	100.0	100.0
Apprenticeship	1.5	5.6
Level 1: 1 to 4 GCSEs	7.9	7.3
Level 2: 5 or more GCSEs (A*-C or 9-4)	26.1	25.5
Level 3: 2 or more A Levels, 4 or more AS Levels	24.6	24.1
Level 4 and above: Degree (BA, BSc)	25.6	24.2
No qualifications	12.7	11.6
Other: Other qualifications	1.6	1.6
8 Process, plant and machine operatives	100	100
Apprenticeship	5.4	13.0
Level 1: 1 to 4 GCSEs	7.5	9.7
Level 2: 5 or more GCSEs (A*-C or 9-4)	17.4	16.1
Level 3: 2 or more A Levels, 4 or more AS Levels	15.1	15.0
Level 4 and above: Degree (BA, BSc)	19.7	13.2
No qualifications	29.4	29.8
Other: Other qualifications	5.5	3.3
9 Elementary occupations	100.0	100.0
Apprenticeship	4.1	9.7
Level 1: 1 to 4 GCSEs	10.0	10.4
Level 2: 5 or more GCSEs (A*-C or 9-4)	20.6	19.3
Level 3: 2 or more A Levels, 4 or more AS Levels	17.4	16.1
Level 4 and above: Degree (BA, BSc)	17.4	14.5
No qualifications	27.3	27.9
Other: Other qualifications	3.2	2.1
Grand Total	100	100

