

**Fermanagh and Omagh District Council's Business Conference – “Boosting Growth and Productivity and Achieving Regional Balance”**

**"The Prospect of Economic and Social Growth in the southern North West, with Fermanagh and Omagh as key regional driver and catalyst"**

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- <https://crossborder.ie/reports/accelerating-growth-towards-an-all-island-perspective-on-regional-development/> (2022) (with Dr Brendan McCormack, Pres Emeritus ATU (Sligo))
- <https://crossborder.ie/reports/accelerating-growth-progressing-globally-ambitious-sectoral-clusters-on-the-island-of-ireland/> (2023)

23 May 2024 Lough Erne Golf Resort Enniskillen

# Three questions

- ***What are the global sectoral value-chains that our Place is part of, and how can we strengthen that sectoral presence here to sustain and grow incomes and jobs?***
- ***Where does our Place sit in the global spatial hierarchy, and how can we leverage it?***
- ***What are the strategic practical actions our Place needs to progress, and what agency do we have to make that happen?***

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# Broad Sectoral Trends 2011-21 FODC and NI

(Source: NISRA Census of Population 2011, 2021)

|  |  |  |  |  | FODC           |                | NI               |                  |             |             |
|--|--|--|--|--|----------------|----------------|------------------|------------------|-------------|-------------|
|  |  |  |  |  | 2011           | 2021           | 2011             | 2021             | %2011/21    | %2011/21    |
| <b>Agriculture, energy and water</b>                           |  |  |  |  | <b>3610</b>    | <b>4086</b>    | <b>29094</b>     | <b>33152</b>     | <b>1.13</b> | <b>1.14</b> |
| <b>Manufacturing</b>   |  |  |  |  | <b>4905</b>    | <b>5084</b>    | <b>77072</b>     | <b>74276</b>     | <b>1.04</b> | <b>0.96</b> |
| <b>Construction</b>  |  |  |  |  | <b>5533</b>    | <b>5699</b>    | <b>65059</b>     | <b>71390</b>     | <b>1.03</b> | <b>1.10</b> |
| <b>Distribution, hotels and restaurants</b>                    |  |  |  |  | <b>11048</b>   | <b>10623</b>   | <b>182087</b>    | <b>176003</b>    | <b>0.96</b> | <b>0.97</b> |
| <b>Transport and Communication</b>                             |  |  |  |  | <b>1629</b>    | <b>2869</b>    | <b>32006</b>     | <b>62757</b>     | <b>1.76</b> | <b>1.96</b> |
| <b>Financial, real estate, professional and administration</b> |  |  |  |  | <b>5986</b>    | <b>5231</b>    | <b>122488</b>    | <b>115803</b>    | <b>0.87</b> | <b>0.95</b> |
| <b>Public Administration, education and health</b>             |  |  |  |  | <b>14479</b>   | <b>16404</b>   | <b>250986</b>    | <b>281530</b>    | <b>1.13</b> | <b>1.12</b> |
| <b>Other</b>   |  |  |  |  | <b>2060</b>    | <b>1756</b>    | <b>36471</b>     | <b>34199</b>     | <b>0.85</b> | <b>0.94</b> |
| <b>Total in employment aged 16+</b>                            |  |  |  |  | <b>49250</b>   | <b>51752</b>   | <b>795263</b>    | <b>849110</b>    | <b>1.05</b> | <b>1.07</b> |
| <b>Total Population</b>  |  |  |  |  | <b>113,200</b> | <b>116,800</b> | <b>1,810,900</b> | <b>1,903,200</b> | <b>1.03</b> | <b>1.05</b> |

# Broad Sectoral Shares 2011-21 FODC and NI

(Source: NISRA Census of Population 2011, 2021)

|  |  |  |  |  | FODC    | FODC     | NI       | FODC/NI  | FODC/NI           |
|--|--|--|--|--|---------|----------|----------|----------|-------------------|
|  |  |  |  |  | 2021    | RS/RW 21 | RS/RW 21 | RS/TS 11 | RS/ST 21          |
| <b>Agriculture, energy and water</b>                           |  |  |  |  | 4086    | 0.08     | 0.04     | 0.12     | 0.12              |
| <b>Manufacturing</b>   |  |  |  |  | 5084    | 0.10     | 0.09     | 0.06     | 0.07              |
| <b>Construction</b>  |  |  |  |  | 5699    | 0.11     | 0.08     | 0.09     | 0.08              |
| <b>Distribution, hotels and restaurants</b>                    |  |  |  |  | 10623   | 0.21     | 0.21     | 0.06     | 0.06              |
| <b>Transport and Communication</b>                             |  |  |  |  | 2869    | 0.06     | 0.07     | 0.05     | 0.05              |
| <b>Financial, real estate, professional and administration</b> |  |  |  |  | 5231    | 0.10     | 0.14     | 0.05     | 0.05              |
| <b>Public Administration, education and health</b>             |  |  |  |  | 16404   | 0.32     | 0.33     | 0.06     | 0.06              |
| <b>Other</b>   |  |  |  |  | 1756    | 0.03     | 0.04     | 0.06     | 0.05              |
| <b>Total in employment aged 16+</b>                            |  |  |  |  | 51752   | 1.00     | 1.00     | 0.06     | 0.06              |
| <b>Total Population</b>  |  |  |  |  | 116,800 | n/a      | n/a      | 0.06     | 0.06 <sup>5</sup> |

# FERMANAGH AND OMAGH VERTICAL SECTORS DEVELOPMENT PRIORITIES PORTFOLIO (FOR DISCUSSION)

| <b>EXISTING SECTORS<br/>(Transform/Convert)*</b>                                | <b>EMERGING SECTORS (POSSIBLES?)<br/>(Create/Attract)*</b>                        |
|---|---|
| <b>AGRIBUSINESS &amp; AGRITECH/ENGINEERING</b>                                  | <b>SOFTWARE DEVELOPMENT (FINREG, CYBER, OTHER DIGITAL AND ICT)</b>                |
| <b>ADVANCED MANUFACTURING ENGINEERING</b>                                       | <b>DIGITAL BUSINESS AND FINANCIAL SERVICES</b>                                    |
| <b>SUSTAINABLE CONSTRUCTION PRODUCTS AND SERVICES (INCLD RETRO-FITTING ETC)</b> | <b>ELECTRICITY GENERATION (RENEWABLES)<br/>SUSTAINABLE/GREEN CIRCULAR ECONOMY</b> |
| <b>TOURISM (REGENERATIVE TOURISM: FERMANAGH LAKES, SPERRINS, GEOPARK ETC.)</b>  | <b>CREATIVE SECTORS</b>   |
| <b>EDUCATION, INNOVATION AND CARE SERVICES</b>                                  | <b>CONNECTED HEALTH</b>   |

**\*MIT LOCAL INNOVATION SYSTEM MODEL**

# FERMANAGH AND OMAGH'S HORIZONTAL CAPABILITIES DEVELOPMENT PRIORITIES

**(FOR DISCUSSION)**

| <b>DIGITALISATION AND CHAT-AI<br/>FINTECH, BLOCKCHAIN, CYBER</b> | <b>MATERIALS ...COMPOSITES<br/>MODERN METHODS OF CONSTRUCTION (MCC)</b>   |
|--|---|
| <b>SMART FARMING TECHNIQUES</b>                                  | <b>OTHER SPECIFIC SECTORAL AND TECHNOLOGY<br/>SKILLS</b>  |
| <b>SUSTAINABLE AND LEAN PROCESSES</b>                            | <b>BASIC – MATHS, BIOLOGY, CHEMISTRY, SOCIAL<br/>SCIENCES, LANGUAGES, EXPRESSIVE ARTS AND<br/>CRAFTS, MECHANICAL AND PLASTIC CRAFTS</b> |
| <b>TRANSVERSAL AND SOCIAL SKILLS</b>                             | <b>ORGANISATIONAL AND LEADERSHIP SKILLS</b>   |

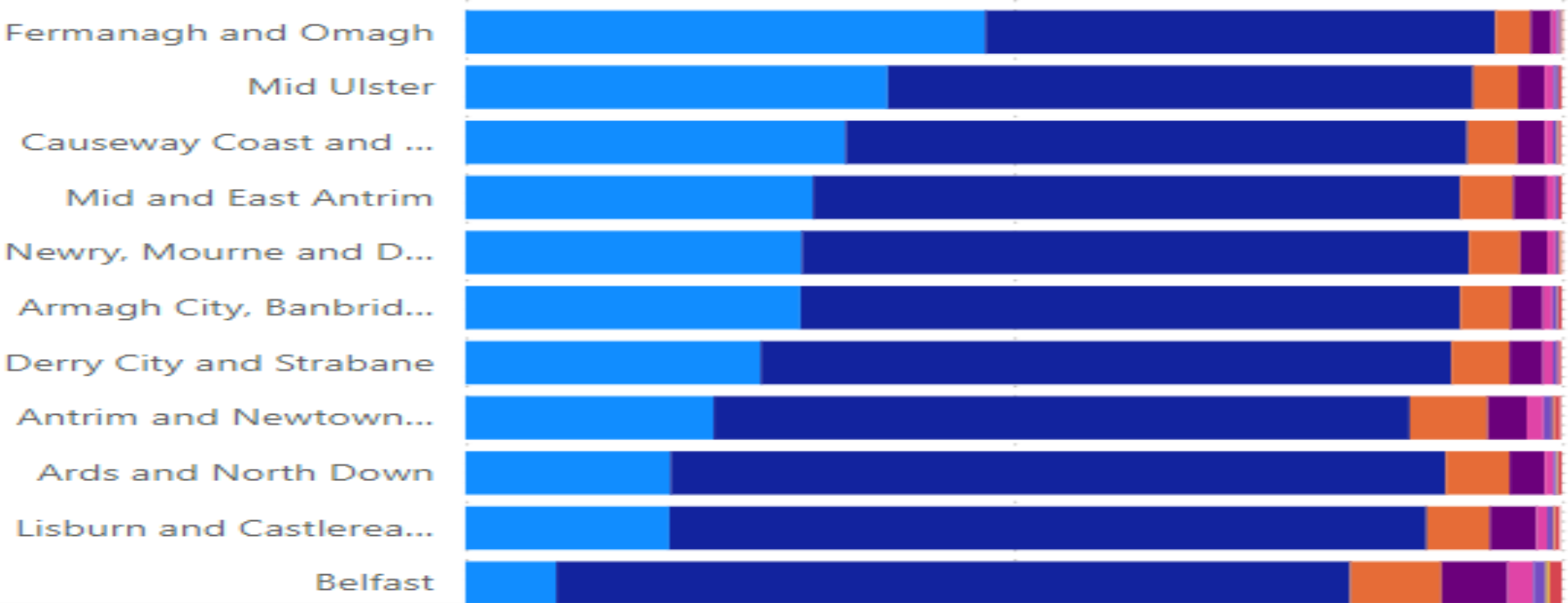


**LIFELONG LEARNING AND NUTURING CULTURE**

# Enterprise Size Structure FODC (Ulster University Enterprise Dashboard)

Business by LGD and employment size band

● 0 ● 1-9 ● 10-19 ● 20-49 ● 50-99 ● 100-199 ● 200-249 ● 250+



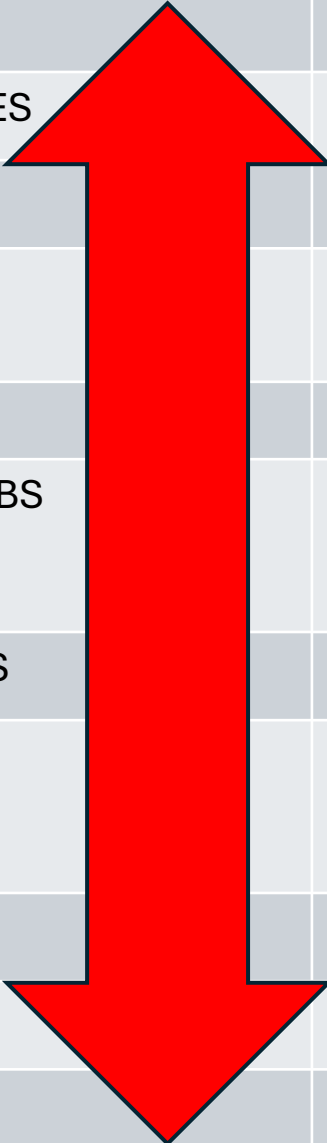


# Three questions

- What are the global sectoral value-chains that our Place is part of, and how can we strengthen that sectoral presence here to sustain and grow incomes and jobs?
- **WHERE DOES OUR PLACE SIT IN THE GLOBAL SPATIAL HIERARCHY, AND HOW CAN WE LEVERAGE IT?**
- What are the strategic practical actions our Place needs to progress, and what agency do we have to make that happen?

# OUR PLACE IN THE GLOBAL SPATIAL HIERARCHY

| LEVEL   | EXAMPLES   |
|---|--|
| LARGE GLOBAL CITIES                                 | LONDON, BERLIN, BRUSSELS, NEW YORK, MUMBAI, BEIJING, CAIRO   |
| MIDDLE SIZE GLOBAL CITIES                           |  |
| SMALL GLOBAL CITIES                                 | DUBLIN   |
| EMERGING CITY REGIONS                               | BELFAST METROPOLITAN URBAN AREA AND ENVIRONS<br>SOUTH-WEST URBAN ARC (WATERFORD-LIMERICK-CORK-GALWAY)  |
| REGIONAL CITIES                                     | BELFAST, DERRY/LONDONDERRY, CORK, LIMERICK, GALWAY, WATERFORD  |
| REGIONAL CITY/TOWN HUBS<br>(< 250-400 + POPULATION) | NORTH-WEST CITY REGION (DERRY/LONDONDERRY, STRABANE AND DONEGAL),<br>MID-SOUTH WEST GROWTH REGION (Fermanagh and Omagh District Council, Mid-Ulster District Council and Armagh City, Banbridge and Craigavon Borough Council) |
| BIGGER REGIONAL TOWNS                               | <b>ENNISKILLEN, OMAGH</b> , SLIGO, CAVAN, MONAGHAN   |
| SMALLER RURAL TOWNS                                 | LISNASKEA, IRVINESTOWN, BELLEEK, CARRICKMORE, DROMORE, FINTONA,<br>TUBBERCURRY, CLONES, BALLYSHANNON, DONEGAL TOWN, CARRICK-ON-SHANNON   |
| RURAL VILLAGES                                      | DRUMSNA,   |
| RURAL TOWNLANDS                                     | ESKRAGH,   |
| ISLANDS   | CLARE ISLAND, RATHLIN  |



# FODC “Inclusive Economy Action Plan 2024-29”

- DEVELOPED IN CONSULTATION WITH BUSINESSES AND OTHER STAKEHOLDERS WITHIN AND BEYOND FERMANAGH AND OMAGH
- DETAILS STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS OF DISTRICT’S PLACE AND DRIVEN BY CONSULTATION AND DATA
- OUTLINES PATHWAYS AND PROJECTS TO ADDRESS NEEDS AND PROGRESS GROWTH WITHIN DISTRICT
- SHARES KEY SHARED AGENDA FOR
  - RANGE OF PRIVATE AND PUBLIC STAKEHOLDERS WITHIN DISTRICT AND
  - THOSE EXTERNALLY SUPPORTING FERMANAGH AND OMAGH AT DIFFERENT LEVELS
- PROVIDES MILESTONES FOR ASSESSING PROGRESS AND SUCCESS

# Mid South West – The Economic Engine of Northern Ireland

*FODC looking to East for spatial leverage and scale ....*

2.2 ...WITH STRENGTHS IN  
MANUFACTURING, ENGINEERING,  
AGRIFOOD, HEALTH & LIFE  
SCIENCES, TOURISM AND  
CONSTRUCTION...

TURBO-CHARGED BY  
MID SOUTH WEST GROWTH DEAL

Fig. 1. MSW Council areas



# NI Regional Development Strategy 2035 ('Building a Better Future') (2013)

*FODC looking also to West and South (ie. southern NorthWest) for greater spatial leverage and scale ...*



**“Enniskillen has an inter-regional gateway function being only 1 hours drive to Sligo on the main transport route and offering a growing private aviation facility at St Angelo airport. There are opportunities for Enniskillen and Sligo to work together to provide services on a cross-border basis”. (RDS 35 p. 67)**

# NI Regional Development Strategy 2035 ('Building a Better Future') (2013)

*FODC looking also to West and South (ie. southern NorthWest) for greater spatial leverage and scale ...*



Key towns include Omagh, Enniskillen, Sligo, Monaghan, Cavan, Donegal etc. which interact together in a myriad of ways

# NI Regional Development Strategy 2035 ('Building a Better Future') (2013)

*FODC looking also to West and South (ie. southern NorthWest) for greater spatial leverage and scale ...*



**The southern North-West, as a Whole working together to mutual benefit, can be greater than the Sum of its Parts**

## ***Building on progress and achievements to date, opportunities for further collaboration to drive incomes, jobs, productivity and community well-being***

- **Similar profiles throughout the broad southern Northwest (Omagh, Enniskillen, Sligo, Monaghan etc.)**
  - Sectors (manufacturing, agribusiness, construction, creatives tourism (literature), etc)
  - Experiences – rural towns, aging population, young people leaving, slower population growth
  - Smaller enterprises and self-employed are relatively high share of employment
  - An enriching natural environment – Omagh Sperrins, Fermanagh Lakeways, Lakelands Geopark, Shannon Pot, North Shannon and much more
- **Context of “Framework of Regional Priorities for the Central Border Region of Ireland/Northern Ireland 2021/2027” (2021)**
  - Cross-border ICBAN partnership of eight member Councils, of Armagh City, Banbridge and Craigavon, Cavan, Donegal, Fermanagh and Omagh, Leitrim, Mid Ulster, Monaghan and Sligo.
  - Advocacy on road infrastructure needs(e.g. A5-N2, N16-A4) , strategic greenways (link SLNCR with Ulster Canal Greenway and reconstruction), new all-island rail connections for FODC and broader NW, broadband upgrade and phone roaming impacts, future agri-supports and green growth
  - Establishment of Human Capital Pillar Steering Group involving six tertiary educational institutions to progress cross-border skills projects in digital, advanced manufacturing and sustainable construction
  - Facilitating Peace-plus and related projects to help development in regional towns and villages
- **Already much collaboration and interaction**
  - SWC, SRC, ATU (S), ETBS for Skills Collaboration
  - SWC/ATU(S) Apprenticeship capacity sharing
  - SLNCR Greenway
  - And much more



## Opportunities to work together, **possible examples to be explored**

- Develop cross-border digital networks, innovation activities, *and* education/training initiatives eg cyber, games etc
- Encourage broader regional cluster for sustainable, digital and off-site modern construction industry
- Develop further BORMAC as shared cross-border manufacturing cluster and network
- Develop and learn from cultural and tourist joint ventures and culture e.g. Enniskillen/Omagh and Sligo literature (Beckett, Wilde, Kiely, Yeats)
- Share knowledge and learning from sites of outstanding natural beauty Omagh Sperrins, Fermanagh Lakeways, Lakelands Geopark, Shannon Pot, North Shannon and much more (<https://www.storyatu.ie/>)
- Work together with enterprises and other organisations for apprenticeships, student work placement and graduate “first job”.
- Further build links with SWC and ATU (S) (now a recognised University), other FECs and Education and Training Boards, for e.g joint apprenticeships and FET/HEI pathways
- Develop initiatives in basic areas eg maths and languages
- Develop digital and blended supports/mentoring for smaller firms and self-employed
- Evolve working closer together of the hospitals in Enniskillen and Sligo and related services
- Develop sustainable solutions e.g. HVO diesel for river boats as well as cars, improved EV charging network, retro-fitting housing projects, rooftop solar on farm sheds etc. etc.

# **The Prospect for the Southern North-West – Potentially More Collaboration for Mutual Benefit and Learning as well as for Synergies and Visibility**

- **Many useful linkages between towns within the broader region**
  - Enniskillen designated as NI Gateway RDS 35
  - Sligo designated as ROI Regional Hub Project 2040 po
  - Omagh and Monaghan key centres along the A5 – more potential as upgraded
  - Enniskillen and Carrick-on-Shannon – river towns
- **Potential to strengthen South-West College and build further regional HEI links**
  - University of Ulster, Queens University Belfast, Open University and Atlantic Technological University, other FECs and ETBs
  - links with CAFRE, AIM, AMIC and similar key centres of innovation within and beyond the broad southern North-West region
- **Can learn greatly from NW City Region experience and success, with North West Tertiary Education Cluster**
- **With 250k + population, the southern North-West can *avail* of scale economies, networks and synergies, and *avoid* being Out of Sight Out of Mind (e.g. AIRR), to boost mutual economic and social growth**

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## **QUESTION OF STRATEGIC ACTIONS**

ALREADY RANGE OF STRATEGIC ACTIONS IN FODC INCLUSIVE ECONOMY ACTION PLAN (2024-29) AND RELATED STRATEGIES

FOR FURTHER RESEARCH AND REFLECTION AS PROGRESSES

QUESTION OF HOW MAXIMISE THE BENEFITS OF WIDER SPATIAL ALLIANCES  
*(LOCAL AUTHORITIES OF FERMANAGH AND OMAGH, SLIGO, LEITRIM, CAVAN AND MONAGHAN AND OTHERS CAN EXPLORE OPTIONS OF GREATER COLLABORATION AND VISIBILITY)*

OVERALL, THE ONGOING UNPEELING OF THE ONION!



# BUILDING **AGENCY** FOR IMPACT IN SHORT-, MEDIUM- AND LONGER-TERM

| NATURE OF AGENCY  | EXAMPLES   |
|-------------------|--|
| <b>CONTROL</b>    | <p>Able to research, reflect and organise together<br/>           Values of pride in our Place and people<br/>           Culture of shared learning practice for action<br/>           “I + We + Us All” Prof Karise Hutchinson UU and 25/25 YLP<br/>           Openness to external interactions<br/> <i>“Council, Invest NI and local enterprise agencies have strong working relationships ...”</i></p> |
| <b>LEVERAGE</b>   | <p>Local education system to develop capabilities<br/>           Local support for smaller enterprises<br/>           Spending on local infrastructure<br/>           Access of larger companies, SME networks and academic connections<br/> <b><u>Spatial “poly-centric” alliances and partnerships to avail of the economies of scale</u></b></p>  |
| <b>EDUCATE</b>    | <p>Local leadership training<br/> <i>“Build world-class business leadership and management skills”</i></p>   |
| <b>INFLUENCE</b>  | <p>Input into State policy on e.g. roads, rail, public funding for innovation and skills,<br/>           Shape a shared elected representatives’ Agenda for this place and region</p>  |
| <b>SUPPORT</b>    | <p>Wider economic and social policies that impact positively locally</p>   |
| <b>UNDERSTAND</b> | <p>Global technology scenarios, options and choices , population change etc – role for SWC and CAFRE etc.</p>  |

# CONCLUSION AND DISCUSSION