

2018-2022

South West Slopes Regional Economic Development Strategy

VISION

The South West Slopes Region will be a thriving community of choice, working together to leverage its endowments and core competencies in agriculture, mining, manufacturing and tourism to achieve sustainable growth

Developed with the support of the NSW Government as part of the Regional Economic Development Strategies program to assist local councils and their communities in regional NSW. June 2018.



TEMORA
The Friendly Shire



Preface

The NSW Government has assisted local councils and their communities to develop 37 Regional Economic Development Strategies across regional NSW. Each strategy is designed around one or more local government areas that form a functional economic region as defined by economic data and community input.

While the strategies have been developed using consistent methodology, each is a product of detailed data analysis and local community consultation to ensure ownership through a ‘bottom-up’ process: it sets out a vision for the Region, the strategies, and early stage actions required to achieve the vision.

Regional Economic Development Strategies articulate a framework for identifying actions crucial to achieving the regional vision. Projects listed within this strategy should therefore be viewed as example projects that have emerged from the initial application of the framework, rather than a comprehensive list of all potential projects. Adoption of these projects would be subject to further evaluative processes.

The power of the Strategy is its ability to be used on an on-going basis to identify additional high value projects over time. By complementing existing funding

processes, these strategies present new opportunities to strengthen and increase investment in regional development across NSW.

Importantly, the Strategy should be viewed as the first stage of a process that will assist those with an interest in the economic development of the Region, particularly councils, communities and local businesses, in planning their future economic activities. It provides a vehicle for engaging the community in a ‘conversation’ about regional needs and priorities, assists in bringing together key stakeholders and mobilising resources, and in so doing, can facilitate faster access to dedicated NSW Government funding, such as the Growing Local Economies Fund, as well helping to capitalise upon other economic opportunities.

This Strategy, prepared by Sensing Value on behalf of the Region, was formed in collaboration with the Councils

in the South West Slopes Region, input from key stakeholders and the broader regional community, which benefited from economic analytical assistance from the NSW Government’s Centre for Economic and Regional Development (CERD).

It is presented in two documents, the South West Slopes Regional Economic Development Strategy 2018–2022 which allows the reader to quickly and easily determine key content, while the accompanying South West Slopes Regional Economic Development Strategy - Supporting Analysis 2018–2022 details the Strategy methodology, evidence and the Strategy development process.

For further information about the Regional Economic Development Strategies program please contact the CERD on 02 6391 3025 or CERD@dpc.nsw.gov.au.



Introduction

The South West Slopes Regional Economic Development Strategy 2018–2022 (the Strategy) sets out a long-term economic Vision and associated Strategy for the Region’s economic development for the five local government areas (LGAs) comprising Bland Shire Council, Cootamundra-Gundagai Regional Council, Hilltops Council, Temora Shire Council and Weddin Shire Council. It builds on the endowments and economic strengths and specialisations of the region to guide investment over the next four years.¹

Economic principles suggest that endowments and specialisations play a key role in regional economy development.²

The Strategy aims to leverage the Region’s endowments: its natural resource attributes including soils and water for agricultural production and a relatively rare mineral resource base; its geographic location within driving distance (4-6 hours) from capital cities of Sydney, Melbourne and Canberra; and its strong local institutions and businesses. These endowments are the basis of the Region’s diverse economic specialisations in Sheep, Beef Cattle and Grain Farming, Meat and Meat Product Manufacturing, Metal Ore Mining and Tourism. These endowments and specialisations were identified through data analysis and informed by community consultation.

The Strategy, which builds on the endowments and specialisations, aims to ensure a long-term sustainable future for the Region through a number of priorities. These include sector-specific strategies as well as a number of more general cross-sector strategies – this reflects the diversity of the economies in the LGAs that make up the Region, with a focus on strategies that can have cross-sectoral (and thus, cross-LGA) benefits:

SUPPORT

and grow the Agriculture, Food Production and Mining sectors

IMPROVE

utilities, energy and telecommunications to grow the agricultural, food processing and mining industries, as well as business start-ups throughout the Region

DRIVE

economic growth in the region’s core sectors by upskilling the workforce and facilitating innovation

CONTINUE

to develop and grow the Visitor Economy

ENHANCE

the liveability and grow the population of the South West Slopes Region

The strategy also takes account of regional risks and how they might be addressed. While the order of these strategies reflects current opportunities to be leveraged or issues to be addressed, each priority should be considered as part of an holistic package that will be important for the overall growth of the regional economy in to the future.

This Strategy is the culmination of collaboration between the Bland Shire Council, Cootamundra-Gundagai Regional Council, Hilltops Council, Temora Shire Council and Weddin Shire Council, informed by input from their respective communities and the NSW Government’s Centre for Economic and Regional Development (CERD).

¹ Regional Economic Development Strategies, Centre for Economic and Regional Development (https://www.dpc.nsw.gov.au/programs_and_services/centre_for_economic_and_regional_development/projects)

² Regional Economic Growth Enablers Report (2017), Centre for Economic and Regional Development.

Background

In 2016, the Region was home to 45,368 people with the major population centres being Young, Cootamundra, Temora, West Wyalong, Grenfell, Harden, Gundagai and Boorowa.³ People who work in the region typically live in the region, as most LGAs in the region have a high level of employment self-containment.

Bland Shire has the highest Employment Self-Containment of all LGAs, with only 12 per cent of employed residents in the LGA working in other LGAs. Weddin Shire has the lowest score of all LGAs in the Region, but still has 76 per cent of its employed residents working locally. Despite this, economic linkages in the major sectors across the Region, such as Agriculture, Mining, Manufacturing and Tourism, underpin the basis for the treatment of the five LGAs as a functional economic region.

Demographically, the Region is characterised by an ageing population. In 2016, the population of the South West Slopes Region had a much higher proportion of older and retirement aged individuals compared to the NSW state average, as well as a significantly smaller proportion of working aged individuals from ages 15 to 49.⁴ Anecdotal evidence from stakeholders suggests this is due to the decision of this cohort to leave the Region and pursue education and employment opportunities in larger cities, combined with inward migration from retirement aged individuals who view the Region as an attractive retirement destination. This has resulted in a relatively stagnant rate of population growth in the Region (0.1% per annum over the past ten years⁵), but this is expected to grow by 0.8% per annum over the period 2016-2026⁶.

Given the importance of population growth in driving regional economic activity, it will be important for the Region to take active efforts to attract new residents and retain current residents.

The Region has a relatively diverse economy, with some notable characteristics within each of its LGAs. Agriculture is the Region's major employing sector and plays a critical role in the regional economy. All LGAs within the Region are strongly engaged in this sector, but do so across a range of produce. The major activities associated with this sector are in Sheep, Beef Cattle and Grain Farming. The Sheep, Grains, Beef and Dairy Cattle sectors were the highest valued industries within the South West Slopes Region (\$1,025.3 million). Since 2011, the sector has experienced a moderate recovery in employment following a significant decline between 2001 and 2011, primarily as a result of the impacts of the prolonged drought.

Health Care and Social Assistance is the Region's second largest employing sector, having significantly increased over the past 15 years. This has been driven by consistent growth in the 65 years and older demographic. In 2016, this cohort accounted for over 16 per cent of the Region's total population.

Trends in employment in the Region's industry sectors are shown in Figure 2.

Employment size can be one indicator of a potential specialisation within a region. Using employment data in conjunction with other sources such as community consultation and online surveys, as well as in consideration with other indicators such as sector value-add, exports and imports, the Region's industry specialisations can be established. This analysis is explored in more detail in the South West Slopes Regional Economic Development Strategy 2018-2022: Supporting Analysis.

³ Australian Bureau of Statistics census data, August 2016

⁴ Australian Bureau of Statistics census data, August 2016.

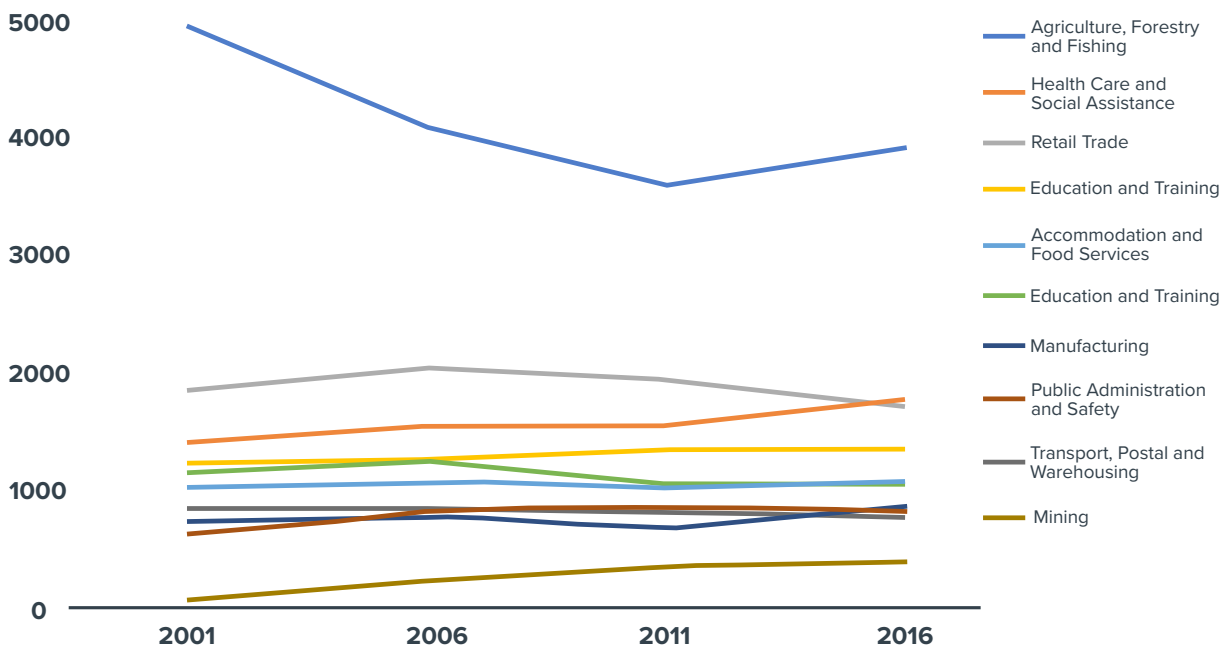
⁵ Australian Bureau of Statistics census data, August 2016.

⁶ NSW Department of Environment and Planning Population Projections, 2016

Figure 1
South West Slopes region boundaries



Figure 2
Employment in the Region, 2001–2016



Endowments

Endowments are strengths that a regional economy possesses and can capitalise on. Economic principles suggest that endowments play a key role in the economic development of each region.

The CERD in its Regional Economic Enablers Report (2016) found that:

the future of individual regional economies is inexorably linked to their natural endowments and attempts to retain or establish industries without an underpinning endowment are unlikely to succeed.

A Region seeking to encourage economic development should concentrate on the factors that enable the growth of endowment-based industries, as well as building local leadership capacity, to capitalise on the opportunities that the Region's endowments present. Endowments

can lead to opportunities from which commercial and industrial interests may leverage and develop specialisations.

⁷ Regional Economic Growth Enablers Report (2017), Centre for Economic and Regional Development.



Table 1

Endowments of the Region identified through analysis and community consultation

Transport and logistics infrastructure	The Region's geographic location means a number of major freight routes run through the Region, both by road and rail. This includes assets such as the Newell Highway (which is the third largest freight corridor in NSW), Mid-Western Highway, Hume Highway, Goldfields Way and the West Wyalong to Condobolin Road. Major freight rail infrastructure includes the Lake Cargelligo and Main South rail lines which are mainly used for grain haulage.
Climate	The South West Slopes Region largely aligns with the South West Slopes Bioregion. The bioregion is dominated by a sub-humid climate characterised by hot summers and no significant dry season, although water security is increasingly important in the Region. A temperate climate features in the far eastern part of the Region, where altitude and rainfall are higher. The Region experiences a high (up to 1200mm) mean annual rainfall in the east, including areas of Hilltops Council and Cootamundra-Gundagai Regional Council. The west experiences lower (around 400mm) mean annual values, this includes areas of Weddin Shire Council.
Natural and mineral resources	The South West Slopes Region enjoys a number of valuable mineral resources that underpin its mining sector (gold, limestone, silver, tin and copper). This significant endowment represents a significant value-add that can inject value into the local populations of the Region, both through the increased demand for construction, technical and professional services during mines construction phase, but also through the ongoing value provided to the council and state through revenues and employment at mine and exploration sites. The Region is also home to a number of state forests, which act as drawcard assets for nature tourism and bird-watching.
Agricultural infrastructure	The Region has a number of significant infrastructure assets with direct linkages to the agricultural and food manufacturing sectors. These include grain handling and storage facilities, meat processing plants in Young and Gundagai, as well as innovation infrastructure at Boorowa CSIRO and the Temora Agricultural Innovation Centre (TAIC). There are also Livestock Selling centres both within the Region (Cootamundra, West Wyalong) and close by (Yass, Cowra, Forbes, Wagga Wagga, Carcoar and Dubbo).
Location	The South West Slopes Region is located within a comfortable driving distance (4-6 hours) from the capital cities of Sydney, Melbourne and Canberra and has access to a number of regional centres and airports (Canberra International Airport, Wagga Wagga, Griffith, Parkes, Nerrandera) with good access to both water and land. This has enabled the Region to attract land-intensive businesses such as poultry businesses from Western Sydney.
Lifestyle infrastructure	The Region is home to a number of unique amenities that drive the quality of life in the Region, including the Temora Jet Boat Track and Grenfell Go-Karting Track, gliding and recreational flying activities in Bland and Temora, regional sporting facilities, cultural facilities, including museums, galleries and theatres, and a network of nature trails that residents and visitors alike enjoy.
Regional airports	The Region's infrastructure assets include airports at Temora, Bland, Cootamundra Gundagai, Young in the Hilltops. The airports are utilised by freight aircraft, charter flights (including the mining sector), emergency services, recreational use and tourism assets such as the Temora Aviation Museum, the Model Aeronautical Association of Australia and The NSW Free Flight Society.
Education infrastructure	The Region is home to a number of education institutions providing TAFE vocational qualifications to meet local industry needs. TAFE campuses are located in West Wyalong, Cootamundra, Young, Temora and Grenfell.

Retiree Population

The South West Slopes Region has an ageing population that is expected to continue to grow into the future as a result of the lifestyle and amenity appeal of the Region. This cohort will have particular health and lifestyle demands that could potentially be leveraged to drive future economic growth.

Local institutions and strong leadership

The Region is well supported by a number of business, tourism and local and state government institutions who are able to drive economic outcomes. Coordination across the Region is enabled through joint organisations such as CENTROC, REROC and Canberra Joint Organisation, although the particular combination of LGAs in the South West Slopes Region has limited experience in working as a single collective. This is a capacity that will need to be strengthened in the future through routine strategic council meetings outlined in the Implementation chapter.

Healthcare infrastructure and services

There are a number of hospitals in the region which provide healthcare and social assistance services located in West Wyalong, Cootamundra, Young, Boorowa, Harden/Murrumburrah, Grenfell and Temora. The Region is serviced by the Western and Murrumbidgee Health Districts with the referral hospitals being located at Orange and Wagga Wagga.

Cultural heritage

A number of LGAs in the South West Slopes Region have a relatively high indigenous population compared to the state and regional averages. There are opportunities to develop initiatives and increase awareness to grow this segment of the Region's cultural tourism offering, which currently does not appear to have a heavy focus.



Specialisations

A simple form of analysis that can be used to gain an understanding of a region’s competitive advantages is the Location Quotient (LQ) which measures the employment concentration in industry sectors within a regional economy, compared with the same sectors across NSW.

Typically, the higher the LQ, the more specialised a region is in that industry relative to the rest of NSW. For the purpose of this analysis, specialisations as defined by LQs, are used as a proxy measure for those sectors and industries that represent a region’s true competitive advantages.

Importantly, while LQs are used in this document for that purpose, they are only a partial measure of those competitive advantages. Hence, they have been considered alongside additional qualitative evaluations and data analysis, such as Input-Output analysis, to arrive at the findings for the South West Slopes Region Strategy. Note that in the analysis below (and in Figure 3 on the following page), employment growth is analysed based on the rate of growth of the sector in the South West Slopes compared to the same sector’s performance across the state of NSW. This allows for the identification of how particular sectors have performed against a wider benchmark.

LOCATION QUOTIENT ANALYSIS

While Sheep, Beef Cattle and Grain Farming is the largest sector in the Region, employing 18.4 per cent of the workforce, a more granular analysis can identify specific sectors in which the South West Slopes has a regional specialisation. In this analysis, key sectors fall into one of three categories:

Important sectors with employment growth greater than the state average

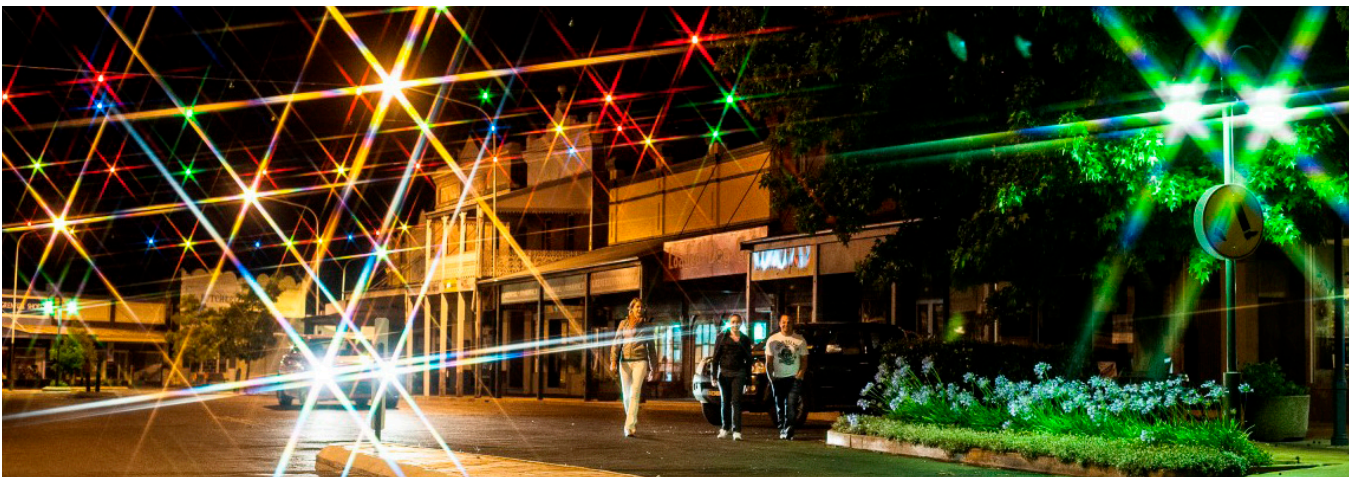
In assessing the LQ of the sectors in the Region, a number were identified as important and growing sectors and thus likely to be a regional specialisation (coloured blue in Figure 3). These sectors are major employers as well as having a high LQ. Meat and Meat Product Manufacturing, Poultry Farming and Other Livestock Farming were all sectors identified as having high LQs and employment in each of these grew at a faster rate in the Region than the average rate for those industries across NSW between 2011 and 2016.

Potentially emerging sectors

Emerging sectors are those whose LQs are lower than the NSW average, but where employment growth nonetheless grew faster than the NSW average between 2011 and 2016 (coloured green). In the South West Slopes, the only major sector which fell into this category was Heavy and Civil Engineering Construction, although this may have been a result of major projects that occurred over the period 2011 – 2016 relating to the Mining sector.

Important with employment growth lower than the state average

There were also a number of key sectors that had high LQs, but whose employment grew by less than the overall state industry performance for that sector (coloured red). Most notable of these is Sheep, Beef Cattle and Grain Farming. Employment in the sector has been heavily impacted by a number of issues in recent years, including drought, farm consolidation and increasing levels of automation, but despite these changes, has remained the largest employing sector in the Region.



It is important to note that employment in some of these sectors did not decline but were instead outperformed by the state average sector performance (such as Metal Ore Mining). For example, although overall mining has declined in the Region, the Bland Shire (where a significant proportion of the Mining sector is located) is still seeing increasing activity in exploration and

creating new mines. This suggests that even with apparent declining employment numbers, some of these sectors are experiencing economic success and growth.

Figure 3 below charts selected industries in the regional economy in 2016 where:

- industries with a larger 'bubble' employed more people;

- industries further above the horizontal line are more specialised when compared to NSW (i.e. an LQ greater than 1.25); and
- industries to the right of the vertical line grew faster between 2011 and 2016 than comparable industries across NSW; industries on the left grew more slowly.

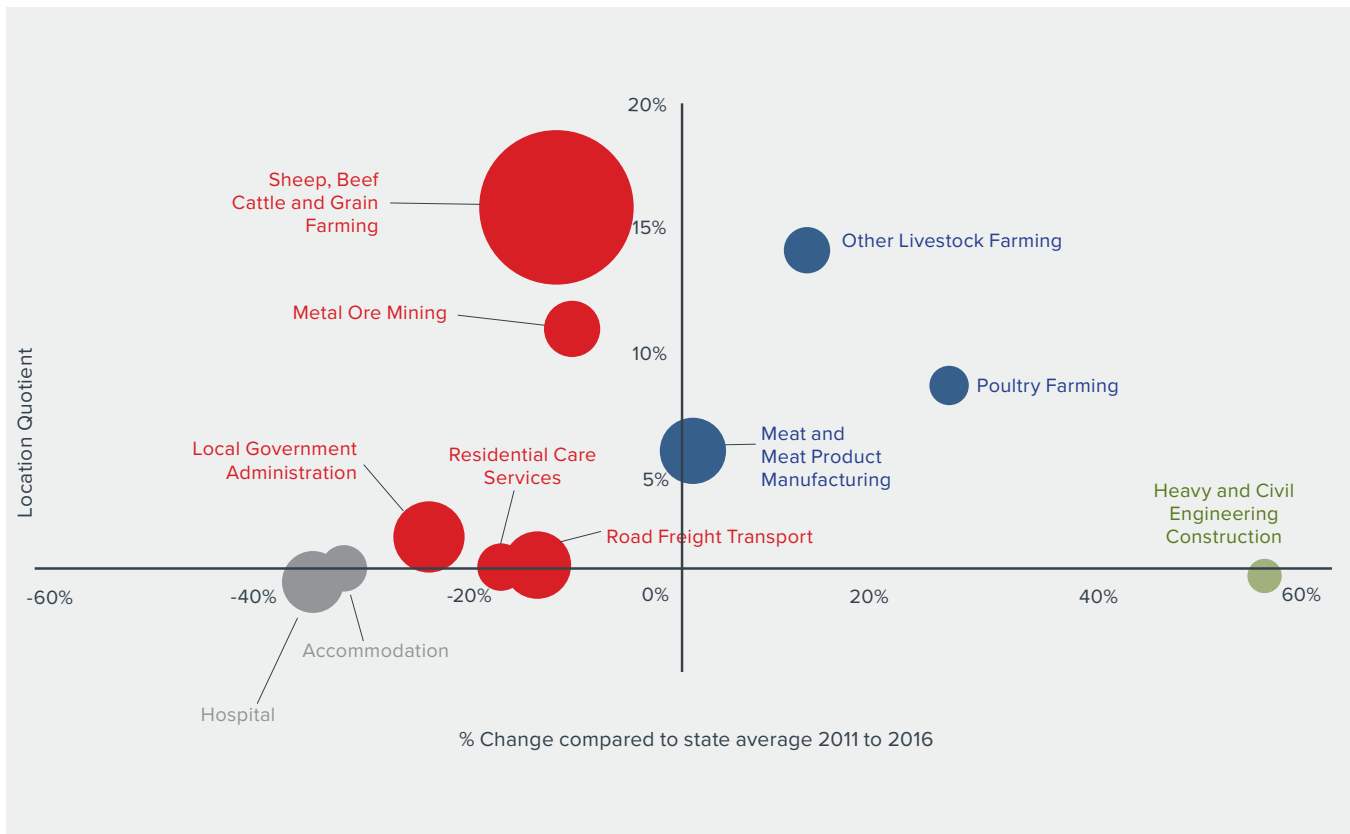
Figure 3. Location Quotients and Employment Growth for Industries in the Region

BLUE sectors are important sectors experiencing employment growth above the state average

GREEN sectors are potentially emerging sectors

RED sectors are important sectors experiencing employment growth below the state average

GREY sectors are supporting sectors which are unlikely to be areas of regional specialisation



Source: ABS Census 2016 and Sensing Value analysis.

⁸ A region's competitive advantage for an industry includes its ability to produce goods and services at a lower cost or differentiate its products from other regions, along with access to external factors which enhance business and operations/minimize risk (Stimson, Stough and Roberts, 2006).

⁹ Australian Bureau of Statistics census data, August 2016.

¹⁰ A LQ of 1.25 is identified in the literature as denoting a specialisation.

Input/Output Analysis

Location Quotient analysis can provide insight into regional specialisations, but this measure may not fully capture the impact of less labour-intensive sectors. Analysis of the value of outputs generated from industry sectors provides another indication of economically important sectors.

The estimated Gross Regional Product (GRP) of the South West Slopes Region was \$2.4 billion in 2015-16. Some of the major sectors which contributed to this included (but are not limited to) Sheep, Grains, and Beef Cattle Farming (\$1.025 billion), Non-Ferrous Metal Ore Mining (\$281 million), Road Transport (\$128 million) and Meat and Meat Product

Manufacturing (\$124 million). These values demonstrate the importance of the agriculture-related industries and mining to the Region from a value-add standpoint.

Major export sectors also provide an indication of a potential regional specialisation. The South West Slopes Region accounted for 0.5% of NSW's exports by value in 2015-16 with major exporting sectors including Sheep, Beef and Dairy Cattle (\$295 million), Non-Ferrous Metal Ore Mining (\$228 million) and Meat and Meat Product Manufacturing (\$48 million) and Accommodation (which acts as a proxy for tourism) (\$19 million).

Identifying regional specialisations

Specialisation sectors or potentially emerging specialisations, which have a reliance on local endowments that are traded outside the Region (i.e. exported), or are servicing more than just the local population, represent sectors which can be the engines of future economic growth. In the South West Slopes Region, these include a number of sectors which are major employers and contribute to value-add. These include: Sheep, Beef Cattle and Grain Farming, Mining, Meat and Meat Product Manufacturing and Tourism.

These sectors form the basis of the key elements of the Strategy, outlined in the next section.



Strategy

The Strategy for the Region builds upon the opportunities presented by its endowments and specialisations, and also aims to address some of the key risks identified in the Region.

These risks related to issues around energy costs, access to utilities and telecommunications and the ability to source skilled labour, all of which impact the ability of the businesses in the Region to remain competitive across a number of sectors.

There are five elements to the Strategy. These have been derived from analysis of the existing endowments that enhance the Region's comparative advantages, followed by examination of current, emerging and potential industry specialisations, identified in consultation with councils and

communities. Notably, this analysis has outlined that agriculture, while still the strongest specialised industry in the sector is also declining. The strategies also aimed to address risks and issues that limited the ability of the Region to grow, and given the diversity of industries across the LGAs in the Region, take a cross-sectoral approach to improve the Region's economic prospects.

Each element is accompanied by a set of early actions, which should be interpreted simply as example actions derived from the preliminary

application of the Strategy framework. It is therefore expected that there will be other actions capable of contributing to the attainment of the Region's vision that are yet to be identified. Consequently, an action's alignment with the Strategy is the primary strategic consideration, rather than it being listed in this document, and all proposed actions will be subject to further qualitative and quantitative evaluative processes. The five elements are not mutually exclusive, and there will be overlap between individual elements.



Support and grow the Agriculture, Food Production and Mining sectors



Improve utilities, energy and telecommunications to grow the agricultural, food processing and mining industries, as well as business start-ups throughout the Region



Drive economic growth in the region's core sectors by upskilling the workforce and facilitating innovation



Continue to develop and grow the Visitor Economy



Enhance the liveability and grow the population of the South West Slopes Region

Support and grow the Agriculture, Food Production and Mining sectors

The South West Slopes Region has a number of natural endowments that form the basis of the comparative advantage of its key sectors. The agricultural sectors in the Region including livestock and grain farming enjoy access to significant fertile land endowment, temperate climate, and access and geographic co-location to food product manufacturing businesses in the region. In addition, the Region has major mineral resource endowments, most notably gold, silver, tin, copper and limestone.

These sectors will be the key drivers of the Region's economy, particularly in generating value of output and growing exports. The operation and performance of those drivers need to be underpinned by a strong Transport and Logistics sector providing a pathway to market and supporting large scale agricultural manufacturing and the expansion of food product manufacturing, both in the expansion of current products as well as supporting the pursuit of new opportunities and ventures. However, many of these sectors are constrained by issues with roads that limit the ability to utilise heavy vehicles and maximise their productivity. Furthermore, plans for the expansion and growth of both the agricultural and mining sectors will require improved connectivity and access to utilities.



Infrastructure Priorities

- Rail and freight infrastructure: investment into a range of infrastructure to bolster and leverage the Region's mining, agriculture and food production sectors
- Road infrastructure: investigation, upgrades and improvements to key roads and bridges to improve efficiency, reduce impact of heavy vehicles, travel times and time to market
- Water security: improve access to water and security for the agriculture, food production and mining sectors
- Digital connectivity: provide fast and reliable internet access (both download and upload speeds) as well as improved mobile coverage across the Region
- Energy infrastructure: ensure access to and affordability of energy for current and future demand for the agricultural and mining sectors



Action

- Re-opening of the Blayney-Demondrille rail line to Class 1 standard
- Identify and zone appropriate land to establish heavy industrial zones along rail corridors with the re-opening of the Blayney-Demondrille Rail Line
- Establishment of intermodal hubs at Harden and Maimuru to enable access to the Blayney-Demondrille line
- Replacement of bridges across Hilltops to enable improved access for freight to the regional road network
- Investigate and upgrade key roads in Bland to improve productivity for agricultural and mining freight movements
- Develop fully serviced residential and industrial estate in West Wyalong to provide for current and future demand from the mining and agriculture sectors
- Construct the Temora Heavy Vehicle Alternate Route
- Identify appropriate employment lands in each major urban centre in the Hilltops and the necessary infrastructure to service them
- Undertake a study to evaluate the potential expansion of gas and electrical distribution network to meet future agricultural and mining sector demands
- Upgrade the Lake Cargelligo and Naradhan rail lines to Class 1 track

2018-2022

Improve utilities, energy and telecommunications to grow the Region's core industries, as well as business start-ups throughout the Region

The reliability of transport infrastructure (particularly with respect to road transport), telecommunications and energy were identified as major risks for the Region and its major employing and value-add sectors. This suggests that potential strategic projects that can improve the reliability of access to and from the Region, and improvements to the telecommunications and energy networks could have wide-ranging effects for improving the competitiveness of businesses in the Region.

Improved telecommunications and lower energy costs could also improve the Region's appeal as a potential migration destination, as well as increase the viability of the Region for attracting new businesses. The new development of Wyalong Solar farm indicates a continued investment in renewable energy production to help with energy needs within the region, despite certain local government agencies approaching capacity in their electricity grid networks.

Connected and ready-to-go industrial estates and land located proximally to major producing sectors such as agriculture and mining could also provide a path for growing or attracting manufacturing businesses to the Region.



Infrastructure Priorities

- Digital connectivity: provide fast and reliable internet access (both download and upload speeds) as well as improved mobile coverage across the Region
- Water and wastewater infrastructure: improvements to address identified water security and affordability issues to industry and townships
- Energy infrastructure: ensure access to and affordability of energy (renewable or otherwise) for current and future demand and to attract new business to the Region with a focus on renewables
- Industrial estates: provide fully enabled industrial estates to meet future demand and attract new businesses to the Region

Action

- Facilitate the smooth roll-out of the NBN
- Address mobile blackspots strategically throughout the Region
- Construction of a water pipeline to Boorowa to provide secure water for residents and industry
- Complete the Plains Water Droughtmaster project to ensure water security for the agriculture, food production and mining sectors
- Undertake study to evaluate potential expansion of gas distribution network to meet future industrial demand
- Development of a new industrial estate in Central Road West Wyalong
- Complete expansion of the Temora Industrial Estate to provide for current and future demand for industrial land
- Construction of the Aria Park Sewage Treatment Plant
- Develop the Cootamundra Turner's Lane Industrial precinct
- Investigate options to address water security issues impacting growth of industries and townships in the Region

Drive economic growth in the Region's core sectors by upskilling the workforce and facilitating innovation

The South West Slopes has a gap in the number of working aged individuals between the ages of 25 – 49. This is compounded by the fact that the population has a lower than average rate of post-school qualifications, which makes it difficult for many businesses to address their skills gaps or grow their business in a sustainable manner. Moreover, as the Region's population continues to age, there will be an increased demand for the range and sophistication of healthcare and social assistance services that will require more skilled workers, as well as across service sectors such as local government and professional services.

Currently, the Region does not have a university campus, meaning that young people often leave the Region to pursue educational opportunities elsewhere. Charles Sturt University campuses exist in the Orange, Wagga Wagga, Bathurst and Dubbo regions of which are accessible to residents in the Region. While TAFE campuses in the Region do provide upskilling and training, there is a significant need for higher level skills to support the increasingly technology-enabled agriculture, mining and manufacturing sectors. Moreover, as the region continues to grow its ageing population, there will be an increased demand for the range and sophistication of healthcare and social assistance services that will require more skilled workers.

Improvements to the amenities and lifestyle appeal of the Region to attract skilled workers should also complement efforts to improve training and education outcomes, cultivate leadership and develop innovation and entrepreneurialism capabilities within the Region. These will all work together to help the Region grow its skilled workforce in a more sustainable fashion.



Infrastructure Priorities

- Innovation infrastructure: Infrastructure that provides opportunities for collaborative working, business start-ups and business incubation
- Educational infrastructure: Investigate the establishment of a university campus to improve educational outcomes



Action

- Develop a Smart Region and Innovation Strategy
- Develop advanced livestock handling and training facilities in Temora to attract research investment and improve farm productivity in the Region
- Capitalise on regional agriculture Innovation Infrastructure (such as the CSIRO Boorowa Agricultural Research Station)
- Undertake a Renewable Energy Project Study to identify potential opportunities across the Region
- Establish an affiliate campus of the Country Universities Centre in Temora
- Capitalise on existing TAFE campuses in the Region to provide newly required skills and qualifications
- Grow the presence of universities in the Region e.g. Country Universities, ANU, CSU

2018-2022

Continue to develop and grow the Visitor Economy

South West Slopes attracts a significant number of visitors. Visitors are typically either domestic day trippers or domestic overnight visitors visiting friends and relatives. While growth in this sector will be influenced a number of factors, the Region has a number of strong natural endowments including state forests which allows bird-watching and, as well as built amenities such as the Temora Aviation Museum and Jet Boat Park that can form the basis of a comparative advantage for the tourism sector.

Tourism-related sectors such as Accommodation, Retail and Food and Beverage services have an increasing employment and value-add impact in the Region, and many of these sectors draw on local produce that can provide the basis for a differentiated tourism product, as well as utilising the region's comparative advantage in these agricultural sectors.

The aviation sector has also been identified by the Council's and stakeholders as a sector with potential for significant growth given the current infrastructure and capacity to leverage off related sectors. The Region's airports are already well used for freight, charter and recreation purposes with strong growth potential across all these areas.



Infrastructure Priorities

- Sector assets: Investment into a range of infrastructure to develop tourism products and assets that can drive further visitation into the Region
- Greater access to natural assets: Provision of critical infrastructure to maintain and strengthen accessibility for visitors to the Region
- Aviation assets: Ensure that aviation facilities meet the needs of both community members and visitors to the Region.



Action

- Implementation of the Temora Airport Master Plan to upgrade runways, associated facilities and commercial and residential estate
- Upgrades and improvements to the West Wyalong airport for charter flights and recreational activities
- Upgrades and improvements to the West Wyalong Showground
- Development of the West Wyalong Nature Reserve
- Development of a NSW Silo Art Trail
- Development of Caravan and Camping Visitor Smart Tracker to support the future planning and development of tourism product and facilities
- Upgrade and improvement of tourism, recreational and sporting facilities and signage in the Bland Shire
- Establishment of an eco-tourism accommodation and environmental education facility on Lake Cowal (InHabit Project)
- Establishment of a Model Aeronautical Air Park in West Wyalong
- Upgrade, expand and rebrand facilities at the Bundawarra Centre
- Extend and renovate facilities at the Temora Aviation Museum
- Development of an indigenous cultural and interpretation centre at the Gundagai Old Mill Art and Cultural Centre
- Establish a national transport museum (Australian Road Transport Heritage Centre)
- Develop the Gundagai Rail Trail
- Investigate ways to leverage Canberra Airport to increase tourism across the Region
- Development of the Chinese Tribute Gardens at Young, the Murrumburrah Cemetery Project, Currawong Project and Blackguard Gully Project to attract Chinese visitors to the Region.

Enhance the liveability and grow the population of the South West Slopes Region

The South West Slopes Region has many features that support high liveability, including friendly communities, housing that is more affordable than metropolitan areas, and good access to community facilities, such as recreation, education, transport, shopping, dining, leisure and culture, all within an attractive rural setting. However, there is an ongoing need to maintain and improve the respective facilities to ensure they preserve the current appeal and meet the demands of residents in the region. Given the low rates of overall population growth in the Region over the past ten years, it will be important that the region focuses on actions that can help grow its population to support its economic activities.

Access to employment is essential for liveability, which is a major focus of this Strategy, both in filling existing employment and skills gap, as well as opportunities for starting new businesses suitable for the Region. Given the importance of population growth to the Region, this Strategy supports and has implications for a number of the preceding strategies in the Strategy document.



Infrastructure Priorities

- Regulatory reform: reduction of impediments to development and regeneration of townships (eg. zoning laws)
- Placemaking and community infrastructure: development of new and improved community facilities
- Amenity improvements: enhance lifestyle amenities in the Region to increase the attractiveness of the Region to skilled workers
- Education and training: create training development opportunities for young people to pursue career pathways in the Region



Action

- Review of the planning framework across the Region to form the basis for comprehensive reforms to the planning framework to address identified impediments to economic development across the Region
- Revitalisation of the Grenfell main street to facilitate new investment in mixed retail, commercial and residential building
- Establish a Social and Community Multipurpose Cultural centre in West Wyalong
- Development of residential subdivisions targeting low cost housing to ensure there is fit-for-purpose housing in the Region.
- Complete the second phase of the Temora Main Street Upgrade
- Establishment of the Hilltops Business Incubator
- Establish the Temora Creative Arts Hub to provide community arts space
- Invest into the Hilltops Learning and Library Precinct
- Investigate strategies to attract people to the Region (e.g. identify target markets and the needs of these types of individuals and businesses)
- Enhancing the towns and villages of the Bland Shire to facilitate in attracting and retaining residents to improve the population growth in the Region.

Strategy and Implementation Actions

Enablers	Support and grow the Agricultural, Food Production and Mining sectors	Continue to develop and grow the Visitor Economy	Drive economic growth in the Region's core sectors by upskilling the workforce and facilitating innovation	Enhance the Liveability of the South West Slopes Region	Improve utilities, energy and telecommunications to grow the agricultural, food processing and mining industries, as well as business start-ups throughout the Region
<p>People and skills</p>			<ul style="list-style-type: none"> Establish an affiliate campus of the Country Universities Centre in Temora Develop advanced livestock handling and training facilities in Temora to attract research investment and improve farm productivity in the region Establish a Campus of the Country University Centre in Young and Temora Develop the Hilltops Innovation Hub 		
<p>Government, regulation, services and information</p>		<ul style="list-style-type: none"> Development of a NSW Silo Art Trail Development of Caravan and Camping Visitor Smart Tracker to support the future planning and development of tourism product and facilities 	<ul style="list-style-type: none"> Undertake a Renewable Energy Project Study to identify potential opportunities across the region Develop a Smart Region and Innovation Strategy 	<ul style="list-style-type: none"> Review of the planning framework across the region to form the basis for comprehensive reforms to the planning framework to address identified impediments to economic development across the region 	<ul style="list-style-type: none"> Development of a Smart Region and Innovation Strategy Undertake study to evaluate potential expansion of gas distribution network to meet future industrial demand Complete the Plains Water Droughtmaster project to ensure water security for the agriculture, food production and mining sectors
<p>Infrastructure</p>	<ul style="list-style-type: none"> Re-opening of the Blayney-Demondrille rail line to Class 1 standard Establishment of intermodal hubs at Harden and Mairuru to enable access to the Blayney-Demondrille line Replacement of bridges across Hilltops to enable improved access for freight to the regional road network Upgrade key roads in Bland to improve productivity for agricultural freight movements Development of a fully serviced residential estate in West Wyalong to provide for current future demand from the mining sector Construct the Temora Heavy Vehicle Alternate Route Development of a fully serviced residential estate and industrial subdivision in West Wyalong to provide for current and future demand in mining and agricultural sectors 	<ul style="list-style-type: none"> Implementation of the Temora Airport Master Plan Upgrades and improvements to the West Wyalong airport Upgrades and improvements to the West Wyalong Showground Development of the West Wyalong Nature Reserve Establishment of an eco-tourism accommodation and environmental education facility on Lake Cowal (InHabit Project) Establishment of a Model Aeronautical Air Park in West Wyalong Upgrade, expand and rebrand facilities at the Bundawarrah Centre Extend and renovate facilities at the Temora Aviation Museum Development of an indigenous cultural and interpretation centre at the Gundagai/Old Mill Art and Cultural Centre Establish a national transport museum Develop the Gundagai Rail Trail Development of the Chinese Tribute Gardens at Young, the Murrumburrah Cemetery Project Currawong Project and Blackguard Gully Project to attract Chinese visitors to the region 		<ul style="list-style-type: none"> Establish a Social and Community Multipurpose Cultural centre in West Wyalong Development of residential subdivisions targeting low cost housing Complete the second phase of the Temora Main Street Upgrade Establish the Temora Creative Arts Hub to provide community arts space 	
<p>Utilities</p>					<ul style="list-style-type: none"> Continue the roll out of the NBN Address mobile blackspots strategically throughout the region Construction of a water pipeline to Boorowa to provide secure water for residents and industry Development of a new industrial estate in Central Road West Wyalong Complete expansion of the Temora Industrial Estate to provide for current and future demand for industrial land Construction of the Ariah Park Sewage Treatment Plant Develop the Cootamundra Turner's Lane Industrial precinct

Implementation

The Strategy will need to be implemented by all five member councils as well as state government agencies and local entities.

The completion of this document is intended to be the first stage of an ongoing process where new specific actions to further progress towards the Vision are identified through application of the framework. It is suggested that an Advisory Committee made up of representatives from each council be established to progress the actions listed in this Strategy, apply the Strategy's framework to identify new actions to be added to the Action Plan, develop key performance indicators and evaluate outcomes. The Advisory

Committee would meet every three months and would report progress on actions to each council. The Advisory Committee could also hold six monthly with the Regional Director, Riverina-Murray, NSW Premier and Cabinet. These meetings could also be used to check the Strategy's progress and review against current grant opportunities.

After two years, the Advisory Committee will conduct a formal review of the Action Plan and produce a brief report

card to be published as an addendum to the Economic Development Strategy. This will also provide an opportunity to update the Action Plan for new or modified actions.

After four years, the Advisory Committee will also begin the process of updating or refreshing the Economic Development Strategy.





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Bland Shire council
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