

# THE VISION

The Murray Region will sustainably grow its economy focusing on agriculture, food production and tourism while improving infrastructure and developing a skilled workforce to support these sectors.



# MURRAY

Regional Economic Development Strategy  
2018–2022





# 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 ongoing 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 in planning their future economic activities; particularly councils, communities and local businesses. 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 as helping to capitalise upon other economic opportunities.

This Strategy was prepared by Sensing Value on behalf of the Region and formed in collaboration with the Councils in the Murray Region and with input from key stakeholders and the broader regional community. It benefited from economic-analytical assistance from the NSW Government’s Centre for Economic and Regional Development (CERD).

It is presented in two documents: the *Murray Regional Economic Development Strategy 2018–2022*, which allows the reader to quickly and easily determine key content; and the accompanying *Murray Regional Economic Development Strategy – Supporting Analysis 2018–2022* which 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 *Murray Regional Economic Development Strategy 2018–2022* (the Strategy) sets out a long-term economic Vision and associated strategy for the Region's economic development. The Murray Functional Economic Region (Murray or the Region) is a cross-border Region which covers six local government areas (LGAs) comprising Berrigan Shire, Edward River, Murray River, Campaspe Shire, Gannawarra Shire and Moira Shire. While these shires are on both sides of the Murray, the Region's economy is not determined by the border between NSW and Victoria, so neither should its economic development vision and strategies. The cross border nature of the Region does represent a challenge for developing and implementing strategy and planning for the economic development of the Region and will require close collaboration between the constituent LGAs.

This Regional Economic Development Strategy (the Strategy) builds on the Region's endowments, economic strengths and specialisations to guide investment over the next four years.<sup>2</sup>

Economic principles suggest that endowments and specialisations play a key role in the development of regional economies.<sup>3</sup> The Murray Region's endowments include natural resources endowments such as: access to land, water and irrigation infrastructure, climate and lifestyle offerings. These endowments form the basis of the Region's current specialisations in agriculture (particularly dairy cattle farming), food processing and tourism. These endowments and specialisations were identified through data analysis and informed by community consultation.

1. Cross Border Commissioner will be involved in Cross Border initiatives.
2. 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](https://www.dpc.nsw.gov.au/programs_and_services/centre_for_economic_and_regional_development/projects))
3. Regional Economic Growth Enablers Report (2017), Centre for Economic and Regional Development.

The Strategy for the Murray aims to ensure a long-term sustainable future for the Region through a number of strategies which include the following three sector-specific strategies, as well as a more general 'cross-sector' strategy:

- Enhance market access and competitiveness for the Agriculture and Food Product Manufacturing sectors through strong transport infrastructure
- Sustain and enhance utilities such as water, energy and telecommunications to strengthen the Agriculture and Food Product Manufacturing sectors
- Continue to develop and grow the Tourism sector to diversify the Region's economy
- Boost and sustain the supply of skilled workers for the core industries of Agriculture, Manufacturing and Tourism with regional skills development and attraction programs.

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 a holistic package that will be important for the overall growth of the regional economy into the future.

This strategy is the culmination of collaboration between the Berrigan Shire Council, Edward River Council, Murray River Council, Campaspe Shire Council, Gannawarra Shire Council and Moira Shire Council; and was informed by input from their respective communities and the NSW Government's Centre for Economic and Regional Development (CERD).



# BACKGROUND

The Murray's boundaries and constituent LGAs are shown in Figure 1.

Figure 1: Murray Region boundaries



In 2016, the Region was home to 105,715<sup>4</sup> people, out of which only 28,993 live in New South Wales. The major population centres are located in the cross-border river towns of Echuca, Moama and Yarrowonga. The Region also includes a number of other medium-sized towns such as Finley, Tocumwal, Deniliquin, Kerang, Mathoura, Barham/ Koondrook and Cobram/Barooga. As its name suggests,

the Region is located along the Murray River, which forms a key component of the Region's economic, cultural and community identity. Population projections from the NSW State Government suggest the trend towards an older age group with the Region is likely continue going forward, with individuals aged 60+ expected to form over 37% of the LGA's population by 2026.

4. ABS QuickStats for the 2016 Census.



## BACKGROUND CONTINUED

While the Region is comprised of LGAs from both New South Wales and Victoria, anecdotal evidence suggests that economic, education and workforce linkages typically flow south into Victoria (particularly towards Shepparton and Melbourne) rather than north to urban centres in New South Wales: i.e. people from NSW travel to Victoria for jobs and education. This has significant implications for the policies and priorities that will be important for the Murray, as many of the amenity and service needs of NSW residents are and will continue to be heavily dependent on actions that occur in Victoria. NSW resident movement to Victoria for service access also impacts on the economic composition of the Region, with relatively lower levels of employment in a range of service sectors due to residents seeking these services from outside the Region.

Demographically, the Region is characterised by an ageing population. In 2016, the population of the Murray 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 20 to 49. Anecdotal evidence from stakeholders suggests this is due to younger people (there is a notably smaller proportion of 15-39 year olds who live in the Murray) leaving the Region and pursuing education and employment opportunities in larger cities, combined with retirement-aged individuals relocating to the Region because of it being an attractive retirement destination. This trend is expected to continue over the next 10 years, with the population remaining relatively constant over this period based on population projections from the NSW and Victorian Governments<sup>5</sup>. It indicates that the Region will need to focus on strategies that can retain working age people in the future.

Within the Murray there is considerable movement of workers between them. This shows the high degree of economic interdependency between the LGAs, as such, their Employment Self-Containment<sup>6</sup> (ESC) and Employment Self-Sufficiency<sup>7</sup> (ESS) vary. Edward River, Campaspe, Gannawarra and Moira all appear to have fairly high Employment Self-Containment which suggests a large proportion of the employed residents in these LGAs work locally. Berrigan and Murray River, in contrast, have sizeable proportions of their resident workforce who work in other parts of the Region.

Agriculture is the Region's major employing sector and plays a critical role in the regional economy, being a key sector in all of the Region's LGAs. The sector enjoys significant endowments such as access to an extensive irrigation network. The major activities associated with this sector are Dairy Cattle Farming, Dairy Product Manufacturing, Beef Cattle Farming and Meat and Meat Product Manufacturing. The Sheep, Grains, Beef and Dairy Cattle sector has the highest value-added within the Region (\$2,147 million) followed by Dairy Product Manufacturing (\$703 million)<sup>8</sup>.

Health Care and Social Assistance is the Region's second largest employing industry, with employment having significantly increased over the past 10 years (see Figure 2 below). Rising demand for health services is not unique to the Region, with employment growth similar to NSW and Victorian state averages.

5. NSW Department of Planning and Victoria in Future Population Projects, 2016-26

6. The Employment Self-Containment index describes the percentage of employed residents who are employed within the boundaries of the LGA.

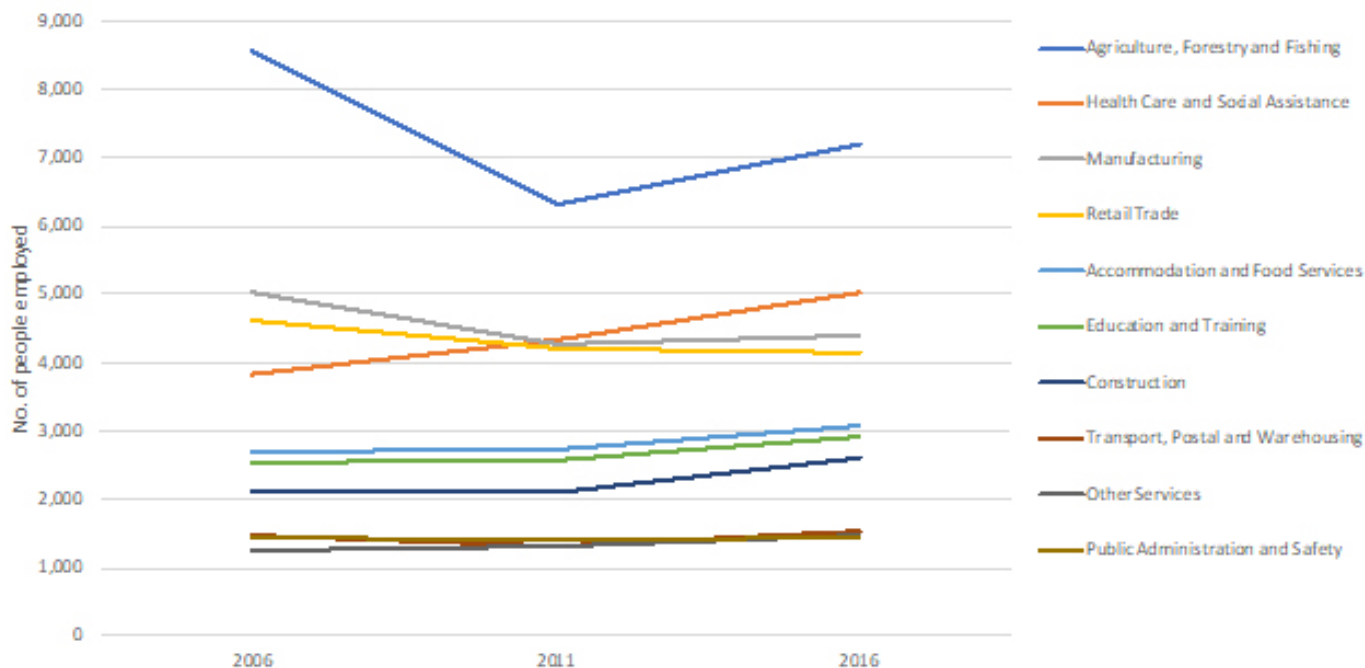
7. The Employment Self-Sufficiency index describes the percentage of local jobs that are filled by local residents for a given LGA.

8. CERD Input-Output analyses, 2017.



# BACKGROUND CONTINUED

Figure 2: Employment in the Region, 2006–2016



Source: Australian Bureau of Statistics (ABS) 2016, 2011, 2006 Census data.

Employment trends were used to identify the key sectors of the Murray Region’s that are its strengths and provide it with a comparative advantage relative to other regions. This was complimented by other information such as a region’s endowments and specialisations and information derived from community consultation and online surveys.





# 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 (2017) 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.”<sup>9</sup>*

A region seeking to encourage economic development should therefore concentrate on those factors that enable the growth of its endowment-based industries, as well as building local leadership capacity. Through this they capitalise on the opportunities that the region’s endowments present which can lead to opportunities from which commercial and industrial interests may leverage and develop specialisations.

## Endowments of the Region identified through analysis and community consultation

### Natural resource endowment

The Murray is endowed with an abundance of sunshine, fertile soil, warm-to-hot climate and a significant supply of water. This combination of natural endowments has allowed the Region to develop into one of the most agriculturally diverse and productive areas in Australia, with many major Dairy, Beef Cattle and Grain Farmers in the Region.

Natural attractions include world-renowned wetlands, the world’s largest river red gum forests, stretching plains of sandhills, salt pans and Mallee scrub, as well as Australia’s longest river, the Murray River, alongside other major rivers including the Wakool, Edward and Murrumbidgee Rivers.

### Food product manufacturing infrastructure

The Murray Region has a number of major food product manufacturers, including meat product processing, grain mills and fruit and vegetable product manufacturers, alongside its significant dairy product manufacturing sector. This includes the Deniliquin Rice Mill, which is one of the largest rice mills in the Southern Hemisphere and a major endowment for the food product manufacturing sector in the Region.

These manufacturers enjoy proximity to primary producers and improved freight route access and lower utility costs would help to lower production costs and thereby enhance the competitiveness of these producers and manufacturers.

### Transport infrastructure

The Murray is located within driving distance of the capital cities of Melbourne and Canberra and is connected by the Murray Valley Highway, Newell Highway, Cobb Highway and Goulburn Valley Highway. The Region also sits on the rail corridor providing connections to major intermodal terminals that can provide access for products to the Port of Melbourne via Shepparton.

However, many of these transport routes also face a number of issues that constrain their ability to be utilised to their full effectiveness. For example, while the Region has an access route to the Port of Melbourne, issues relating to costs and timeliness of shipping at the port constrain the ability of exporters in the Region to fully capitalise on this infrastructure.

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





## ENDOWMENTS CONTINUED

### Irrigation infrastructure and water

A comprehensive irrigation system and water from the Murray River provide a major competitive advantage to the agricultural sector in the Murray Region. The backbone of the system is a series of weirs, canals and holding ponds fed by a number of river systems.

This has allowed agriculture in the Region to be highly productive, although there are a number of issues relating to the differential distribution of irrigated water for Victorian producers when compared to NSW producers in the Region. This issue will need to be addressed to ensure the ongoing sustainability of Agriculture in the Region.

### Aboriginal heritage

The Murray has a rich Aboriginal heritage. There are many significant Aboriginal sites within the Region which spans the traditional lands of the Yorta Yorta, Ngurrailam, Baraba Baraba, Wemba Wemba and Wadi Wadi people.

### Tourism infrastructure

The Murray is home to a number of well established holiday destinations including Echuca-Moama, Yarrawonga-Mulwala and Deniliquin.

Waterfront infrastructure is in place in these towns, but needs to be expanded and upgraded to unlock the full value of the Region's natural assets.

The Region's tourism sector (managed by joint tourism organisations such as the Murray Regional Tourism Board) leverages heavily off the presence of a number of major rivers and water bodies across the Region, including the Murray, Edward, Wakool and Murrumbidgee rivers.





# SPECIALISATIONS

It is crucial to identify the economic strengths of the Region which may be approached both through an analysis of employment in industry sectors and the contribution of industry sectors to generating gross regional product.

A simple form of analysis that can be used to gain an understanding of a region's comparative advantage<sup>10</sup> is the Location Quotient (LQ) which measures the employment concentration in industry sectors within a regional economy, compared with the same sectors across NSW. 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 in turn used as a proxy measure for those sectors and industries that represent a region's true comparative advantages.

Importantly, while LQs are used in this document for that purpose, they are only a partial measure of those comparative 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 Murray.

## Location Quotient Analysis

While Sheep, Beef Cattle and Grain Farming is the largest sector in the Murray, employing 6.9% of the workforce<sup>11</sup>, a more granular analysis helps identify specific sectors in which the Region has a regional specialisation. In this analysis, key sectors fall into one of three categories:

### Important sectors with employment growth greater than the sector average across NSW

In assessing the LQ of the sectors in the Region, a number of sectors were identified as important and growing faster than the sector average across NSW 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.

Dairy Cattle Farming, Dairy Product Manufacturing, Sheep, Beef Cattle and Grain Farming, Fruit and Tree Nut Growing, Bakery Product Manufacturing, Residential Care Services, Accommodation (indicative of a specialisation in tourism), Road Transport and Local Government Administration were all sectors identified as having high LQs and faster employment growth than comparable sectors across NSW between 2011 and 2016. Meat and Meat Product Manufacturing is also a sector that falls into this classification, although it should be noted that recent abattoir closure in Cobram means this figure should be used with caution.

### Potentially emerging sectors

Emerging sectors are those whose LQs are lower than the NSW sector average, but whose employment growth nonetheless grew faster than the sector average across NSW over the period 2011 to 2016 (coloured green in Figure 3). In the Murray, this includes Legal and Accounting Services, Medical Services and Other Social Assistance Services. If growth in these sectors can continue to be supported and cultivated, they could eventually develop into regional specialisations.

### Supporting sectors, unlikely to be areas of regional specialisation, with employment growth lower than the state average

There are a number of major employing sectors whose employment declined, relative to comparable sector averages over the period, most notably, Hospitals and Allied Health Services. This suggests the sector is unlikely to be an area of regional specialisation.

10. A region's comparative 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).

11. Australian Bureau of Statistics census data, August 2016.



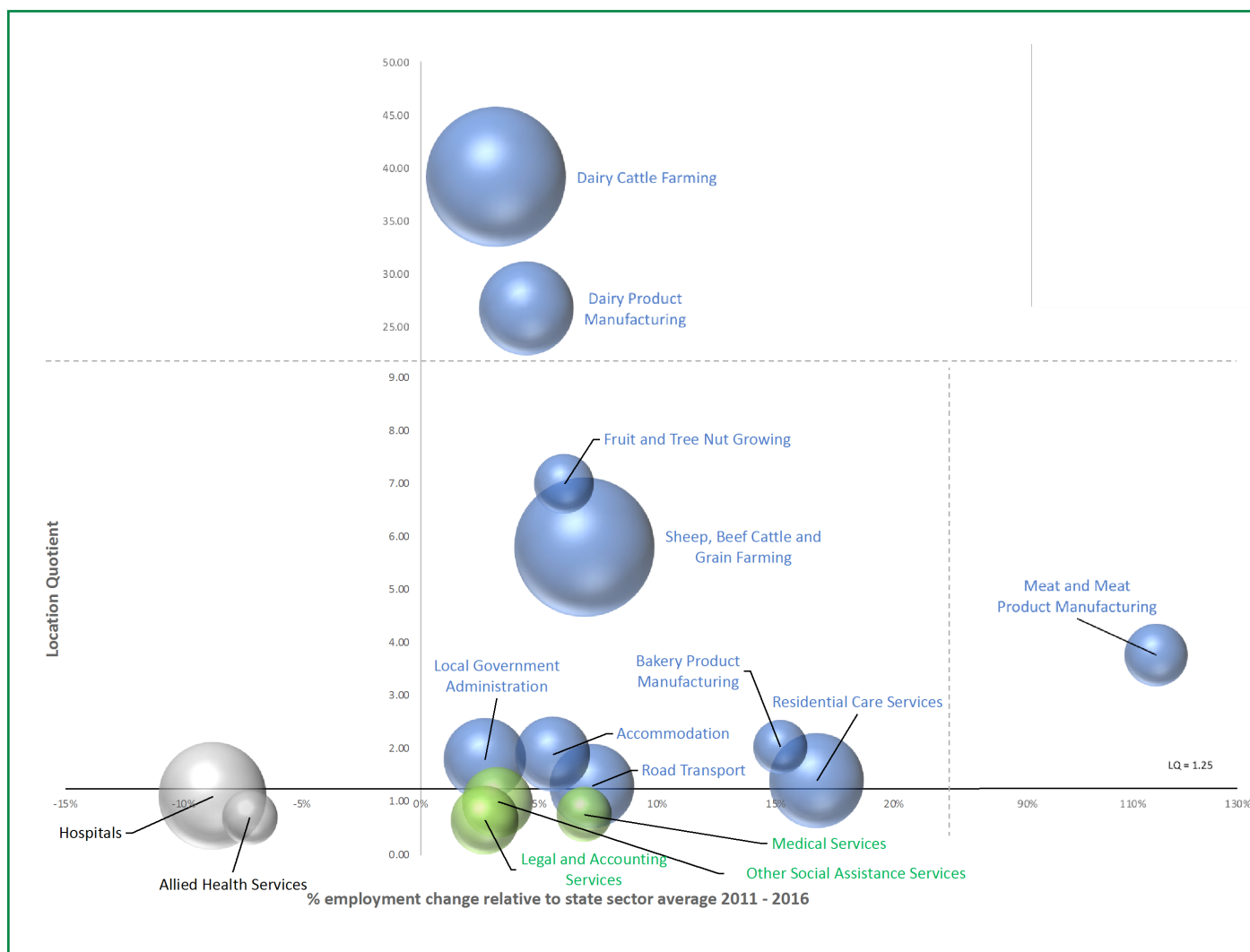
# SPECIALISATIONS CONTINUED

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

- industries with a larger 'bubble' employed more people;
- industries further above the horizontal axis are more specialised when compared to NSW (i.e. an LQ greater than 1.25<sup>12</sup>); and

- industries to the right of the vertical axis grew faster between 2011 and 2016 than the industry average across NSW. Industries on the left grew (comparatively) more slowly.

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



Source: ABS 2016 Census and Sensing Value analysis.

**BLUE** sectors grew faster between 2011 and 2016 than sector average across NSW

**GREEN** sectors are potentially emerging sectors

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

12. An 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. An analysis of the value of outputs generated from industry sectors can provide another indication of economically important sectors.

The estimated Gross Regional Product (GRP) of the Murray Region was \$5.3 billion in 2015–16. Some of the major sectors which contributed to this included (but are not limited to) Sheep, Grains and Beef and Dairy Cattle Farming (\$2.15 billion); Dairy Product Manufacturing (\$703 million); and Fruit and Vegetable Product Manufacturing (\$341 million). These values demonstrate the importance of the agriculture-related industries to the Region from a value-added perspective.

Major export sectors also provide an indication of a potential regional specialisation. The Murray Region accounts for 0.8% of NSW's exports by value in 2015–16 with major exporting sectors including Sheep, Grains, Beef and Dairy Cattle (\$497 million); Dairy Product Manufacturing (\$137 million); Fruit and Vegetable Product Manufacturing (\$84 million); and Accommodation (which acts as a proxy for tourism) (\$66 million).

Tourism is an industry specialisation for the Region and is inferred from the Region's relative strength in the Accommodation sector (see Figure 3). Using tourism visitation and expenditure data, the Centre for Economic and Regional Development has used Input-Output modelling to estimate the direct impact of tourism on the regional economy on the NSW Side of the Region.

The data indicated that in 2015–16, tourism directly contributed \$40.9 million in value-added, as well as being directly responsible for 774 Full Time Equivalent jobs. It is likely that the total value-added of tourism in the whole Region is significantly higher as the Victorian LGAs of Campaspe, Gannawarra and Moira all have significant tourism activities.

## Identifying regional specialisations

The Core Competencies Analysis for the Murray Region suggests that the Region has significant competency in its access to and the reliability of freight and transport infrastructure, a strong export focus and a strong knowledge base in a number of sectors. However, the Region also suffers from issues in reliability of telecommunications and utilities. Issues relating to quality of roads, as well as a number of downstream issues at the Port of Melbourne have significant impacts on the ability of producers to get products to market quickly and efficiently. The Region also faces issues relating to its cross-border nature – both in terms of regulations and procurement of irrigated water.

Specialisation sectors, or potentially emerging specialisations, that 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 Murray Region, these include a number of sectors which are major employers and contribute to value-added. These include: Sheep, Beef and Dairy Cattle Farming; Dairy Product Manufacturing; Fruit and Vegetable Product Manufacturing; and Tourism.

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





# STRATEGY

## Key strategies to grow the Murray Region

The Strategy for the Murray 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. There are four elements to the Strategy. These have been derived from analysis of the existing endowments that form the basis of the Region's comparative advantages, followed by examination of current industry specialisations, and emerging specialisations that were identified in consultation with councils and communities.

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 would be subject to further qualitative and quantitative evaluative processes.

1	Enhance <b>market access</b> and competitiveness for the Agriculture and Food Product Manufacturing sectors through strong transport infrastructure
2	Sustain and <b>enhance utilities</b> such as water, energy and telecommunications to strengthen the Agriculture and Food Product Manufacturing sectors
3	Continue to develop and grow the <b>Tourism</b> sector to diversify the Region's economy
4	Boost and sustain the <b>supply of skilled workers</b> for the core industries of Agriculture, Manufacturing and Tourism with regional skills development and attraction programs





## 1 | Enhance market access and competitiveness of the Agriculture and Food Product Manufacturing sectors through strong transport infrastructure

The Murray has a number of natural endowments that form the basis of the comparative advantage of its key sectors. Its agricultural sectors have access to a significant water and fertile land, a temperate climate and access and geographic co-location to food product manufacturing businesses.

Dairy Cattle Farming and Dairy Product Manufacturing are the largest sectors in the Region from a value-add, employment and export perspective, and hence represent the heart of the Region's economy. Horticulture also represents an increasingly significant proportion of the Region's agricultural activities, and benefits from many of the same advantages that Dairy Cattle Farming enjoys with regards to land, access to water and climate. Strategies that can help expand agriculture's products and markets set the path forward for the future of the Region's core industry.

This suggests that potential strategic projects that can improve the reliability of access to and from the Region, providing producers and growers with an increasingly efficient pathway to market to lower transport costs and support new products and higher volumes is an important role for infrastructure development in the Region. Reliable transport infrastructure provides investor confidence to increase production and to develop more efficient supply chains involving larger-scale agricultural and food product manufacturing. Current risks that relate in part to transport infrastructure that hamper the Region's potential include volume constraints, consistency of service and cost effectiveness.

### Infrastructure Priorities

**Freight and airport infrastructure:** investment into infrastructure to bolster and leverage the Region's agriculture and food production sectors

**Road infrastructure:** upgrades and improvements to key roads and bridges to improve efficiency, reduce the impact of heavy vehicles, travel times and time to market

### Early Stage Priority Actions

- Upgrade the Echuca Moama bridge
- Support planned improvements to rail connections from Deniliquin to Echuca freight connections
- Completion of the sealing of Pericoota Road linking Moama and Barham
- Upgrade of truck stop amenities in Barham and Murray Downs
- Implementation of the Deniliquin Airport Expansion project
- Upgrade and complete sealing of Tocumwal Rd between Tocumwal and Deniliquin
- Upgrade the Tocumwal Truck stop to incorporate a hard stand for uncoupling and driver amenities
- Complete Goulburn Valley Highway Strathmerton Bypass
- Upgrades to Yarrawonga/Mulwala bridge and McCoys bridge
- Address issues at the Port of Melbourne that limit the ability of producers to get products to market in a timely fashion
- Investigate options for dairy producers in the Murray to target new markets and products
- Upgrades to roads in Barham



## 2 | Sustain and enhance utilities such as water, energy and telecommunications to strengthen the Agriculture and Food Product Manufacturing sectors

The reliability of telecommunications and energy supplies were identified as major risks for the Region across most sectors. Improvements suggest that potential strategic projects that can improve the reliability of water and energy supplies and improvements to the telecommunications and energy networks could have wide-ranging effects for improving the competitiveness of local businesses. This includes improvements to utilities and telecommunications connections to industrial estates across the Murray, which can open up growth opportunities for local industry in a range of sectors including Food Product Manufacturing and the enabling transport industry.

Improved telecommunications and lower energy costs could also improve the Region's appeal as a potential migration destination, as well as making the Region a more attractive location for business.

### Infrastructure Priorities

**Digital connectivity:** provide fast and reliable internet access and improved mobile coverage in parts of the Region

**Water and wastewater infrastructure:** improvements to address identified water security issues to industry sectors

**Energy infrastructure:** ensure access to energy for current and future demand and to attract new business to the Region

**Industrial estates:** provide fully enabled industrial estates to meet future demand and attract new businesses to the Region

### Early Stage Priority Actions

- Improved telecommunication across the Region such as NBN rollout and Mobile blackspots
- Increase in water pressure to the existing industrial estate in Moama
- Upgrade the electricity supply to the new Moama business park
- Extension of the natural gas pipeline to Hill Side Road Moama to supply the new industrial estate
- Natural gas infrastructure enhancement in Deniliquin
- Development of a CBD Masterplan for Deniliquin
- Undertake the expansion of the Tate Drive industrial estate in Gannawarra
- Upgrades to water treatment plants in Berrigan Shire to provide for residential expansion and improve water quality



## 3 | Continue to develop and grow the Tourism sector to diversify the Region's economy

The Region attracts a significant number of visitors who are drawn by the Murray River, national parks and built amenities such as golf courses and other social and sporting clubs. The numerous waterways are at the heart of the Region's offerings and infrastructure that allows it to further leverage these riverways provides an important focal point for the Region's tourism future.

While employment in sectors such as Accommodation and Food and Beverage Services have been variable over the period, there is evidence of consistent demand from visitors to the Region. Visitor spend to Echuca/Moama was estimated at \$224 million in 2016–17, while visitors to Swan Hill spent an estimated \$173 million over the same period. Many of these centres also draw on local produce that can provide the basis for a differentiated tourism product, which if developed, could have potential for further export and branding opportunities for agriculture in the Region.

The Murray also has a number of towns such as Echuca, Moama, Deniliquin, Yarrawonga and Cobram which have a long-standing reputation as attractive visitor destinations. Opportunities can also be progressed to develop tourism offerings related to the rich indigenous history and culture of the area, as they are currently not fully leveraged in the Region's tourism products.

### 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

### Early Stage Priority Actions

- Implement the Deniliquin Riverfront Precinct
- Development of the Nature-Based Tourism Hub in Gannawarra
- Investigate options to develop a product built on the Region's indigenous history and culture
- Development of Edward River Region Heritage/Tourism Product
- Implementation of the Tocumwal Foreshore Development Plan
- Implementation of the Masterplan for the Tocumwal Historic Aerodrome Museum
- Development of the Berrigan-Moira Sports Tourism Strategy
- Implement priorities identified in the Echuca Visitor Events Precinct Plan
- Development of the Deniliquin Regional Arts and Performance Space Master Plan
- Redevelopment of Meninya St, Moama





## 4 | Boost and sustain the supply of skilled workers for the core industries of Agriculture, Manufacturing and Tourism with regional skills development and attraction programs

The Murray has a gap in the number of working-aged individuals between the ages of 25–49. This is compounded by the fact that the Region's 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 without looking outside the Region. This is driven by a number of circumstances in the Region – an ageing population, the absence of any university campuses and the presence of a major services hub in Shepparton south of the Murray, where young people go for educational opportunities.

The Region will need to investigate options to address skills gaps in its workforce, as well as look at projects aimed at improving the attractiveness of the Region as a destination for skilled workers.

### Infrastructure Priorities

**Community infrastructure:** development of new and improved community facilities

**Amenity improvements:** enhance housing and 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

### Early Stage Priority Actions

- Investigate options to develop a long-term workforce strategy for the Region
- Investigate options to develop internship or training partnerships with major employers in the Region
- Investigate and work with existing education institutions to develop courses for regional needs
- Investigate the option of attracting a University campus within Region to supply relevant courses
- Development of a Regional Micro-Enterprise Strategy to attract professional, financial services, social services and allied health





## Strategy and Implementation Actions

Enablers	Enhance market access and competitiveness for the Agriculture and Food Product Manufacturing sectors through strong transport infrastructure	Sustain and enhance utilities such as water, energy and telecommunications to strengthen the Agriculture and Food Product Manufacturing sectors	Continue to develop and grow the Tourism sector to diversify the Region's economy	Boost and sustain the supply of skilled workers for the core industries of Agriculture, Manufacturing and Tourism with regional skills development and attraction programs
People and skills				<ul style="list-style-type: none"> <li>➤ Development of a Regional Micro-Enterprise Strategy to attract professional, financial services and Allied Health</li> <li>➤ Investigate options to develop a long-term workforce strategy for the Region</li> <li>➤ Investigate options to develop internship or training partnerships with major employers in the Region</li> <li>➤ Investigate and work with existing education institutions to develop courses for regional needs</li> <li>➤ Investigate the option of attracting a University campus within the Region to supply relevant courses</li> </ul>
Government, regulation and information	<ul style="list-style-type: none"> <li>➤ Address issues at the Port of Melbourne that limit the ability of producers to get products to market in a timely fashion</li> <li>➤ Investigate options for dairy producers in the Region to target new markets and products</li> </ul>	<ul style="list-style-type: none"> <li>➤ Development of a masterplan for the reinvigoration of the Deniliquin CBD</li> </ul>	<ul style="list-style-type: none"> <li>➤ Implement the Deniliquin Riverfront Precinct Masterplan</li> <li>➤ Investigate options to develop a product built on the Region's indigenous history and culture</li> <li>➤ Development of new heritage tourism products for the Edward River Region</li> <li>➤ Development of the Berrigan/Moira Sports Tourism Strategy</li> <li>➤ Development of the Echuca Visitor Events Precinct Plan</li> <li>➤ Implement priorities identified in the Echuca Visitor Events Precinct Plan</li> </ul>	

## Strategy and Implementation Actions CONTINUED

Enablers	Enhance market access and competitiveness for the Agriculture and Food Product Manufacturing sectors through strong transport infrastructure	Sustain and enhance utilities such as water, energy and telecommunications to strengthen the Agriculture and Food Product Manufacturing sectors	Continue to develop and grow the Tourism sector to diversify the Region's economy	Boost and sustain the supply of skilled workers for the core industries of Agriculture, Manufacturing and Tourism with regional skills development and attraction programs
Infrastructure	<ul style="list-style-type: none"> <li>➤ Complete the Echuca Moama bridge upgrade</li> <li>➤ Completion of the sealing of Perricoota Road linking Moama and Barham</li> <li>➤ Upgrade of truck stop amenities in Barham and Murray Downs</li> <li>➤ Complete the Deniliquin Airport Expansion Project</li> <li>➤ Upgrades to Tocumwal Road between Tocumwal and Deniliquin</li> <li>➤ Complete the Goulburn Valley Highway Strathmerton Bypass</li> <li>➤ Invest in upgraded infrastructure at the Tocumwal Truck Stop</li> <li>➤ Construct a new bridge between Yarrawonga and Mulwala to provide a new route for tourism, agribusiness and manufacturing</li> <li>➤ Support planned improvements to rail connections from Deniliquin to Echuca freight connections</li> <li>➤ Upgrades to roads in Barham</li> </ul>	<ul style="list-style-type: none"> <li>➤ Undertake upgrades to the roads in the commercial and industrial areas of Barham</li> <li>➤ Undertake the expansion of the Tate Drive industrial estate in Gannawarra</li> </ul>	<ul style="list-style-type: none"> <li>➤ Implementation of the Tocumwal Foreshore Masterplan to reinvigorate the CBD and refocus the town and foreshore precinct</li> <li>➤ Development of the Deniliquin Regional Arts and Performance Space Master Plan</li> <li>➤ Redevelopment of Meninya St, Moama</li> </ul>	



Strategy and Implementation Actions CONTINUED

Enablers	Enhance market access and competitiveness for the Agriculture and Food Product Manufacturing sectors through strong transport infrastructure	Sustain and enhance utilities such as water, energy and telecommunications to strengthen the Agriculture and Food Product Manufacturing sectors	Continue to develop and grow the Tourism sector to diversify the Region's economy	Boost and sustain the supply of skilled workers for the core industries of Agriculture, Manufacturing and Tourism with regional skills development and attraction programs
Utilities		<ul style="list-style-type: none"> <li>➤ Improved telecommunication across the Region such as NBN rollout and Mobile blackspots</li> <li>➤ Increase in water pressure to the existing industrial estate in Moama</li> <li>➤ Increase gas and electricity supply to the Moama Business Park</li> <li>➤ Seek the extension of the natural gas supply to Hillside Road in Moama and in Deniliquin</li> <li>➤ Upgrades to water treatment plants in Berrigan to provide for residential expansion and improve water quality</li> <li>➤ Extend town water supply 6km along east Barham Rd to service a new food processing sector</li> </ul>		

# IMPLEMENTATION

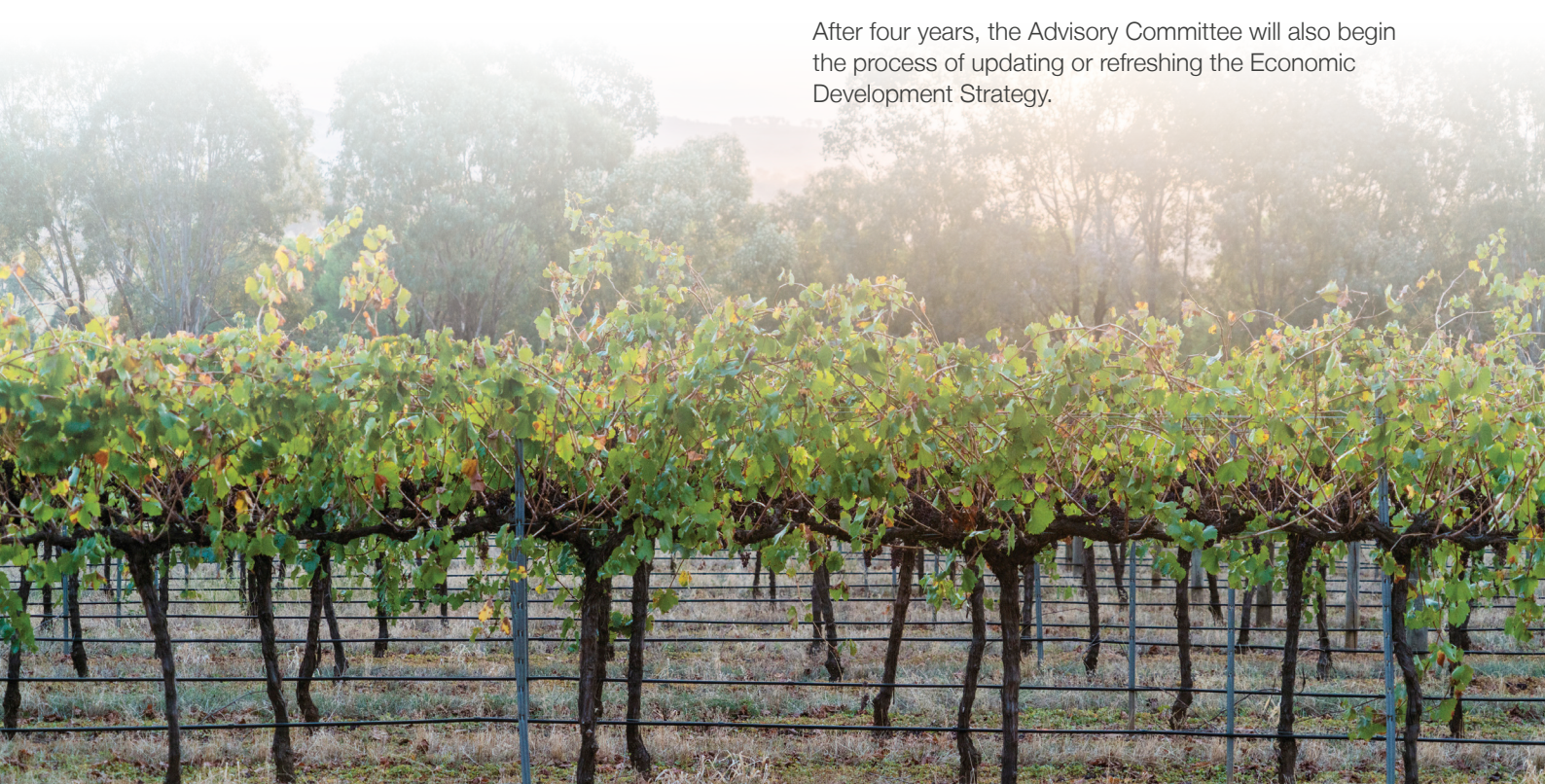
The Strategy will need to be implemented by actions by and close collaboration between all six member councils as well as state government agencies and local entities.

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 meetings 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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