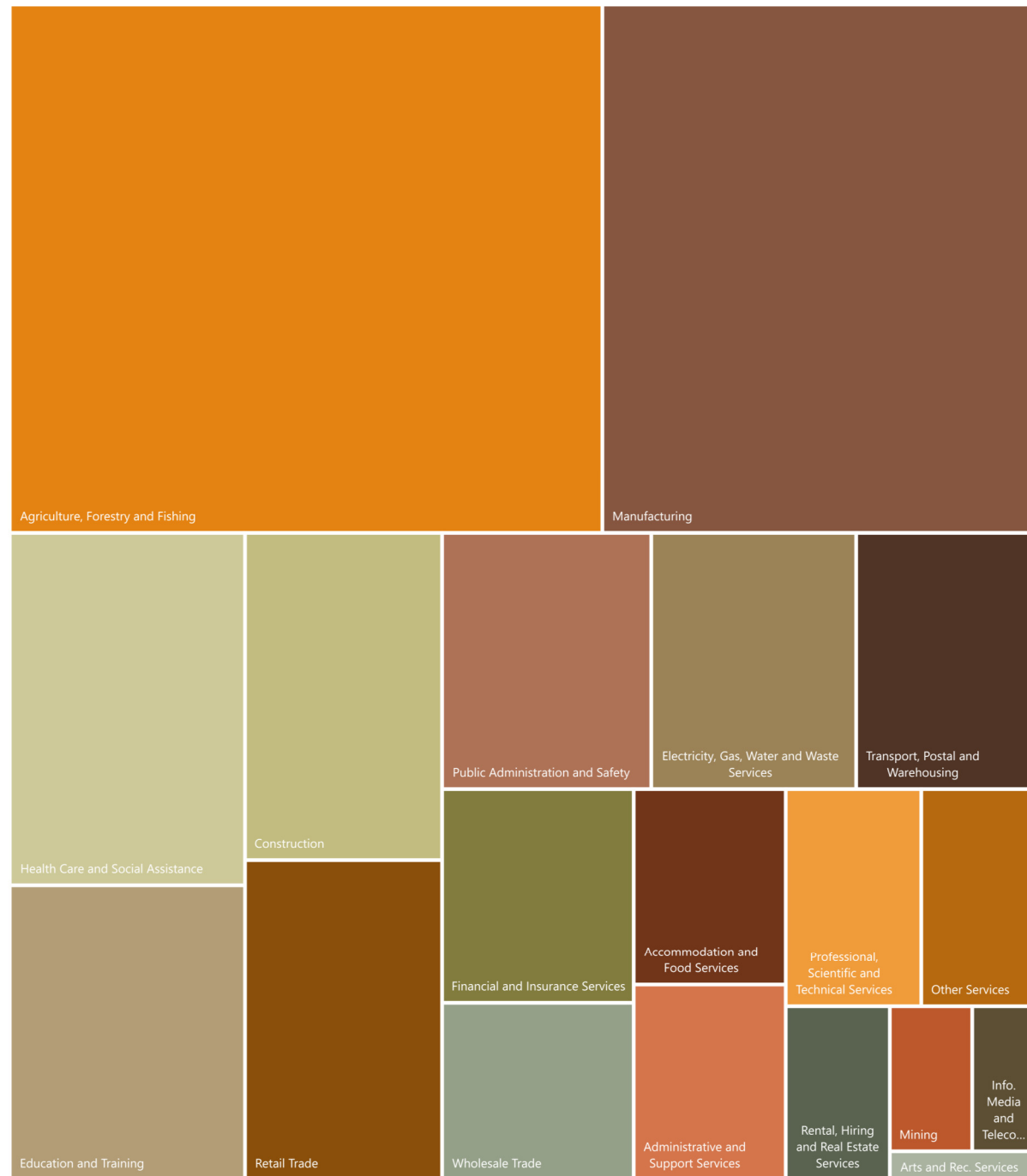


# Western Riverina Regional Economic Development Strategy 2018 - 2022

## Vision

*A regional economy where people, skills, natural resource management and the quality of services enhance the region's existing economic strengths in agribusiness and make it an attractive place to live, learn, work, invest and provide produce and products to Australia and the world.*



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Narrandera Shire Council

Murrumbidgee City Council



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# 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. 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, 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 Corview on behalf of the Region, was formed in collaboration with the Carrathool Shire, Griffith City, Leeton Shire, Narrandera Shire and Murrumbidgee councils, 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).

The Strategy is presented in two documents, the **Western Riverina Regional Economic Development Strategy 2018 -2022 (this document)** which allows the reader to quickly and easily determine key content, while the accompanying **Western Riverina 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](mailto:CERD@dpc.nsw.gov.au)

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# Introduction

The **Western Riverina Regional Economic Development Strategy** (the Strategy) has been developed to facilitate economic growth opportunities across the Western Riverina, particularly as a ‘food bowl’ and production centre for domestic and overseas markets.

With several centres of varying sizes, the Western Riverina is based around its regional city, Griffith, with a population of almost 26,000, underpinned by the communities of the broader Murrumbidgee Irrigation Area (MIA).

While the objective of this Strategy is similar to previous local strategies – to support economic development for social advancement across the community – it takes a new and distinctive approach to integrated strategic regional economic planning.

Fundamental to this approach is the concept of the Functional Economic Region. Past strategies have been based on administrative areas – like council boundaries, or a Regional Organisation of Councils grouping.

In this Strategy, the Carrathool, Griffith, Leeton, Narrandera and Murrumbidgee councils form a Functional Economic Region (the Region), due to economic linkages they share across their administrative boundaries.

The Strategy development process is also different from past approaches, emphasising the distinctive and unique endowments and specialisations of the Region.

Economic principles suggest these unique strengths provide regions with comparative advantages, and so should be points of focus for regional development policy.

Western Riverina’s unique strengths were determined through review of several factors:

- the Region today – considering the Region as a whole and the localities within it for their particular demographics, infrastructure, institutions, risks and opportunities
- endowments - key features of the natural environment, built environment, geography and society specific to the Region
- specialisations – activities in which the Region has a demonstrable advantage relative to others
- stakeholder engagement and consultation – ‘on the ground’ feedback on local economic conditions and forward-looking opportunities to help shape the future.

Specialisations in Agriculture and Manufacturing are shown to be the key drivers of the Western Riverina economy. These strengths provide strategic imperatives to:

1. develop and grow its Agricultural and Manufacturing ‘Engines of Growth’
2. invest in skills and the supply of key utilities critical to ‘Engines of Growth’ production processes, noting in particular energy network constraints
3. facilitate population and labour pool increases that support greater output, specialisation and productivity through increasing housing supply and enhancing services and liveability.

The Strategy also takes account of regional risks and how they might be addressed.

This Strategy is the culmination of collaboration between the Carrathool Shire, Griffith City, Leeton Shire, Narrandera Shire and Murrumbidgee Councils, their respective communities and the NSW Government’s CERD.

Strategy implementation will be overseen by an Economic Advisory Panel comprised of each council’s General Manager, drawing on their staff and broader stakeholders as appropriate.

# Background

Home to over 49,000 people, the Western Riverina Region comprises the following Local Government Areas:

- Carrathool Shire
- Griffith City
- Leeton Shire
- Murrumbidgee
- Narrandera Shire

The total area is 32,738 km<sup>2</sup>. Western Riverina is 570 km from Sydney, 435 km from Melbourne, 1,250 km from Brisbane and 790 km from Adelaide.

Western Riverina is a predominantly rural region featuring the rapidly growing regional city of Griffith, major centre of Leeton, and townships of Coleambally, Darlington Point, Goolgowi, Hillston, Jerilderie and Narrandera.

The Region's degree of integration is reflected in flows of labour between council areas. Less than 2 per cent of people working in the region live outside it, with more than 10 per cent living in one part of the Region and working in another (and over 20 per cent of workers employed in outlying areas such as Hillston or Jerilderie).



Much of the Region's current day economic character can be traced back to the Murrumbidgee Irrigation Scheme and related investments in water infrastructure in the early 1900s.

These endowments support the key features of Western Riverina today, especially the scale of its operations and intensity of investment in agribusiness and manufacturing.

Long known for its dryland cropping and livestock production, the Western Riverina gradually diversified into rice, citrus, wine and other fruit production.

More recently, Western Riverina producers have further diversified into higher value, longer term yield crops such as nuts, cotton, olives and vegetables.

Through its strengths in produce and production, the Western Riverina is poised to significantly expand its role as a food bowl of Australia over time and pursue overseas export markets for premium produce delivered in a consistent, timely and efficient way.

# Regional Dashboard – 2016 Census

		Carrathool	Griffith	Leeton	Murrumbidgee	Narrandera
	Estimated 2016 residential population	2,719	25,641	11,168	3,836	5,853
	Population growth rate between 2001 and 2016	+4.9%	+7.5%	-2.3%	-11.8%	-10.7%
	Unemployment rate 2016	3.2%	4.8%	5.2%	4.5%	6.1%
	Personal weekly median income 2016	\$681	\$674	\$607	\$659	\$575
	Top three industries by employment 2016	<ol style="list-style-type: none"> <li>1. Agriculture</li> <li>2. Health Care and Social Assistance</li> <li>3. Education</li> </ol>	<ol style="list-style-type: none"> <li>1. Manufacturing</li> <li>2. Retail Trade</li> <li>3. Agriculture</li> </ol>	<ol style="list-style-type: none"> <li>1. Manufacturing</li> <li>2. Agriculture</li> <li>3. Education</li> </ol>	<ol style="list-style-type: none"> <li>1. Agriculture</li> <li>2. Health Care and Social Assistance</li> <li>3. Manufacturing</li> </ol>	<ol style="list-style-type: none"> <li>1. Agriculture</li> <li>2. Health Care and Social Assistance</li> <li>3. Manufacturing</li> </ol>

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# Snapshot of Population, Economy, Industry and Opportunity

## Population Profile

The Western Riverina's population increased by 1.5 per cent across the Region between 2001 and 2016, significantly lower than for regional NSW (+12 per cent), NSW (+18 per cent) and Sydney (+21 per cent). As is reflected in the Regional dashboard, the Region's growth can be mainly attributed to Griffith, which grew by 7.5 per cent across the period. Most centres have seen population increases following the breaking of the 10 year drought in 2011.

Demographic analysis suggests that when compared to regional NSW, Western Riverina is marginally overrepresented in its younger workforce and underrepresented in its older population compared to what is typical in regional NSW. Together with relatively low unemployment rates, this bears out the Western Riverina as a major "working region" of regional NSW. The data can be taken as suggestive of the possibility that perceived limitations in aged care and health services are encouraging older members to move away from the Region.

## Distribution of Production and Income

Figure 1 on the next page is a key 'roadmap' to understanding economic opportunity in the Region. It reflects the income split between workers and businesses in each sector (blue and orange bars) and how much each industry contributes to regional production (the stacked height of the bars).

In analysing the Region's economic features, it can also be useful to group similar industries together to allow review and comparison of some of their common underpinning economic drivers. One useful classification of activities is:

- "Engines of Growth" – activities linked to external markets and opportunities beyond the bounds of the Region, like Agriculture, Manufacturing and Tourism
- "Enabling Industries" – markets within the Region providing key support services to Engines of Growth businesses, like Finance, Utilities or IT inputs
- "Population Serving Industries" - markets serving the people and communities of the Region, including activities like Health, Education and Retail Trade.

The most striking aspect in the Western Riverina is the two dominant 'Engines of Growth' making up about 42 per cent of the \$2.4 billion regional economy. Agriculture, Forestry and Fishing (\$634 million) and Manufacturing (\$465 million) together account for about three-quarters of regional exports and stand out on the Figure as 'peaks of prosperity' for the Region.

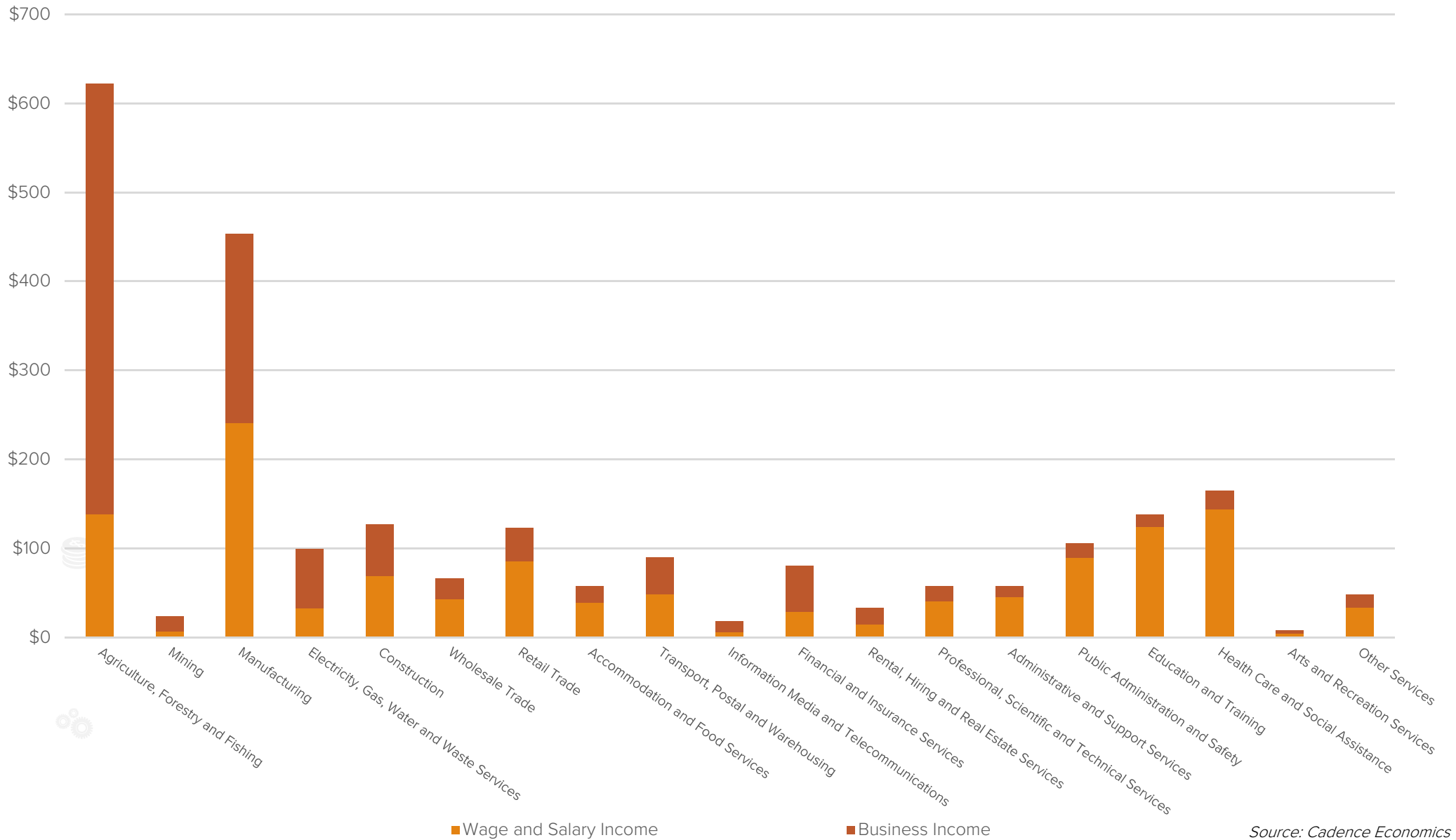
Business income in the Western Riverina is heavily concentrated in Agriculture, Forestry and Fishing and Manufacturing, contributing more than 60 per cent of business income. Utilities, Construction, and Financial and Insurance Services provide the next three largest sources of business income.

Wage and salary income is led by Manufacturing, followed by Health Care, Agriculture, Education, Public Administration, Retail and Construction. Together, these seven industries make up more than 70 per cent of employee income.

Relative to NSW's regional economy overall, the Western Riverina's Agriculture and Manufacturing industries are significantly overrepresented in the Region's output, with production shares about three times larger than is typical. Manufacturing strength is complemented by utilities output 30 per cent larger than typical. This suggests a degree of supply chain integration and demonstrates specialisations oriented towards 'Engines of Growth' and external markets.

# Regional Output by Industry and Income

Figure 1: Output by Industry and Income 2016 – (\$M)



Source: Cadence Economics



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# 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 regions. The CERD in its Regional Economic Growth 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.*

A region seeking to encourage economic development should therefore concentrate on factors that enable the growth of endowment-based industries, as well as building local leadership and institutional capacity and capabilities, to facilitate businesses and public agencies and services to capitalise on the opportunities that a region's endowments present. Endowments can lead to opportunities from which commercial and industrial interests may leverage and develop specialisations.

## **Physical or geographic endowments**

**Arable land** – Western Riverina includes extensive tracts of arable lands applicable for both for agriculture and horticulture. These endowments are closely linked to the 'engines of growth' industries that are key sources of regional strength and advantage.

**Access to water and irrigation systems** – The availability of water is a critical input for agricultural production as well and other consequent value chain activities, like Food and Beverage Manufacturing.

**Proximity to major metropolitan markets** – Western Riverina's geography provides relative proximity to Melbourne and Sydney, Australia's two largest capital cities. Both cities have also seen substantial population increases in recent years, affording Western Riverina large and expanding market opportunities not available to many other regions.

## **Built endowments**

**Extensive road and rail freight arterial infrastructure** – Proximity to Melbourne and Sydney is indicative of geographic opportunity for the communities of the Western Riverina. However, generally it is the high quality of the road and rail freight arterial network infrastructure that has done most to help realise that opportunity. Businesses across Western Riverina utilise these connections to transport their products to market with relative ease, efficiency and reliability compared to many other regions.

**Increasing supply and value chain integration in Agriculture and Manufacturing** – Anecdotal evidence supports the view that the Region as a whole, as well as individual operators, exhibit increasing amounts of supply and value chain integration. There is a measure of support for this in the available data, noting the rising agricultural specialisations in the smaller LGAs in parallel with increasing amounts of Food and Beverage Manufacturing in Griffith and Leeton.

**Sophisticated water infrastructure** – Horticultural areas of Western Riverina are marked by extensive private and public water infrastructure networks. Investments in water efficiency have substantially increased yield on water inputs and provided a basis for ongoing intensification and specialisation of strengths.

**Private capital equipment** – Many businesses in Western Riverina operate with remarkable productivity by virtue of extensive investments in highly valuable capital equipment. The scale and proficiency of operations is significant and of high quality, with many businesses competing globally by virtue of first rate equipment and expertise. While much of the capital relates to harvesting and Food and Beverage Manufacturing, the Region also has producers of manufactured goods using equivalent equipment.

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# Endowments

## Human endowments

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**Operational and entrepreneurial capability** – For a Region with a relatively modest population, Western Riverina is fortunate to have a number of large private businesses. Stakeholder engagement provided the impression that the Region not only has a relatively large number of entrepreneurs with relatively strong balance sheets and risk appetite, but also that their horizons for investment tend to consider global markets as much as they do domestic markets.

**Emerging population serving employment clusters** – Employment in education and health services and the retail sector expanded significantly across all of regional NSW in the 10 years. Even allowing for that general trend, the relative concentration of employment in these sectors in the Western Riverina has increased across the decade. The available data is suggestive of potentially important emerging specialisations and advantages, with special emphasis on the larger centres of Griffith and Leeton.

## Institutional endowments

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**Water security** – The Murray Darling Basin Plan introduced in 2012 has simultaneously reduced the total amount of water available for extraction in the Western Riverina, while increasing the security of water entitlements over the medium to long term. Anecdotal evidence suggests this has helped support investments that have shifted production towards produce that offers better returns, like almonds and olives, but requires time horizons in excess of five years before a commercial yield begins to become possible. This supports a conclusion that the Basin Plan has simultaneously increased both investor confidence and allocative efficiency among alternative forms of production.

**Balance of Lifestyle, Social and Economic Opportunities** – the Western Riverina affords people the opportunity to work hard, live well and easily connect with other members of the community.

**Collaboration between private investors and operators** – Western Riverina also exhibits an effective social network among its private investors and operators. During the consultation phase informing this Strategy, it was common for one stakeholder to suggest discussion with others to gain their perspective on topics of interest.

**Collaboration between the councils of the region** – the councils of the Western Riverina exhibit a high degree of collegiality in working together to share information and resources, which is an essential feature for good governance across the Region. Recent steps towards implementing Joint Organisations will increase the resourcing and capacity available to take collective actions.

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# 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. 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 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 Strategy.



\*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).

# Specialisations

The Western Riverina's **'Engines of Growth'** account for more than \$1.3 billion of regional output, larger than total output of some Regions.

Agriculture and Manufacturing are the leading specialised sectors among the Engines of Growth. Output from this grouping is about 40 per cent larger than typical for regional NSW.

Detailed analysis of ANZSIC data from the 2016 Census reflects the Region's significant sub-industry specialisations in this grouping include:

1. Sheep, Beef, Cattle and Grain Farming
2. Meat and Meat Product Manufacturing
3. Fruit and Tree Nut Growing
4. Poultry Farming
5. Vegetable and Cotton Growing
6. Fruit & Beverage Processing and Manufacturing
7. Grain Mill and Cereal Manufacturing
8. Road Freight Transport
9. Specialised Machinery and Metal Container Manufacturing
10. Professional & Scientific and Heating & Ventilation Equipment Manufacturing
11. Log Sawmilling and Timber Dressing

The Region's **'Enabling Industries'** account for more than \$350 million of regional output.

Overall, Enabling Industries' share of regional output is only about 75 per cent of the share typical for regional NSW.

Utilities are the only industry level specialisation in this grouping and also its largest contributor to output.

Detailed analysis of ANZSIC data from the 2016 Census reflects the region's significant sub-industry specialisations in this grouping include:

1. Water Supply, Sewerage and Drainage Services
2. Electricity Distribution
3. Packaging Services

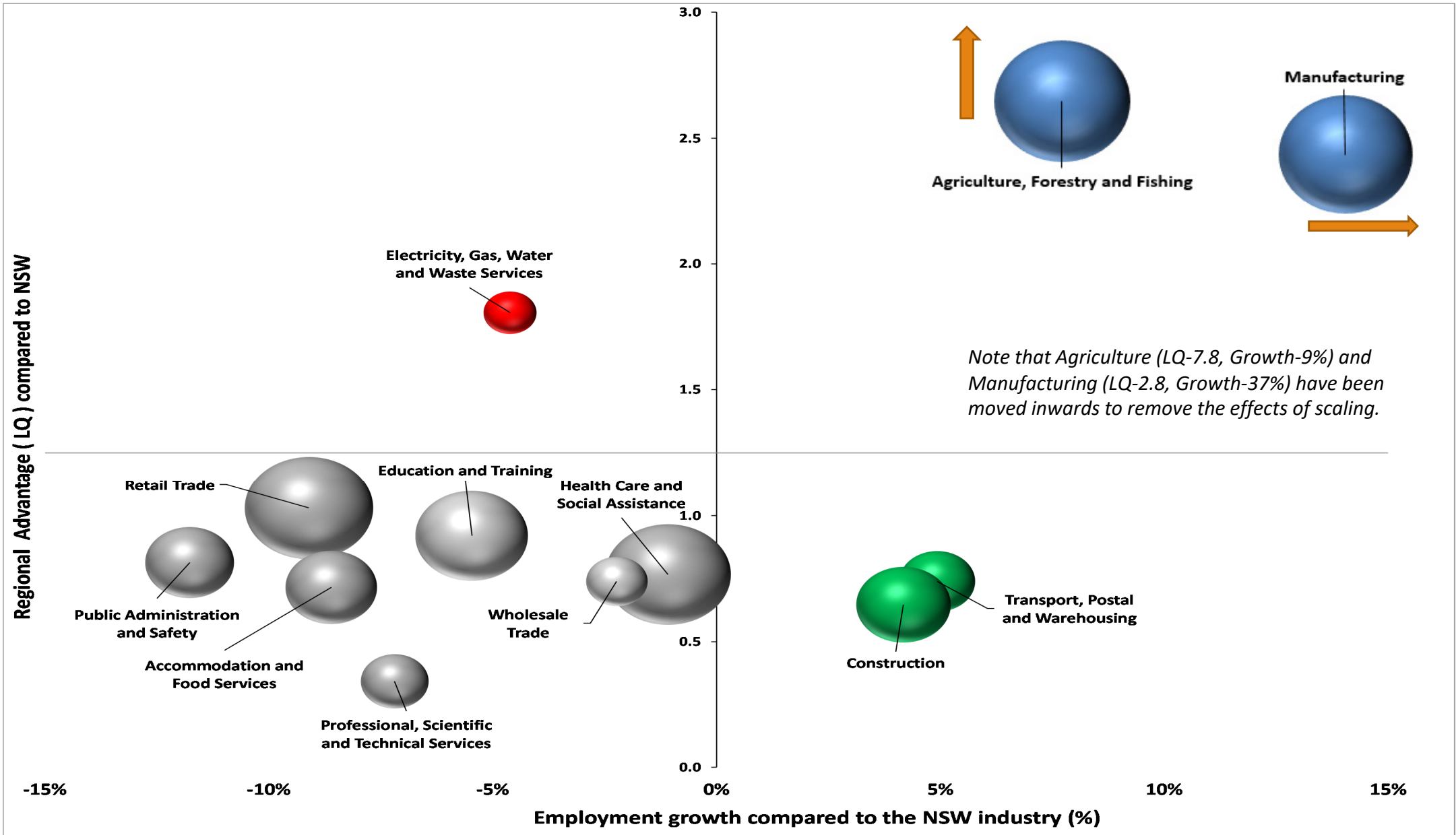
The region's **'Population Serving Industries'** account for almost \$700 million of regional output. This grouping's share of regional output is about 70 per cent of the proportion typical for regional NSW.

Health, Education, Construction and Retail Trade each represent markets of about \$130 million or more. Education (in Leeton) and retail (in Griffith) are the main specialisations in this grouping.

Detailed analysis of ANZSIC data from the 2016 Census reflects the Region's significant sub-industry specialisations in this grouping include:

1. School Education (Leeton)
2. Specialised retailing, including Fuel Retailing along the Newell Highway and Supermarkets, Department Stores and Furniture, Electrical, Hardware and Recreational Goods, in Griffith
3. Local Government Administration
4. Residential Care Services

# Employment by Industry: Prevailing Strengths and Recent Changes



# Specialisations

Economic change since 2011 has seen employment shifts in favour of the Western Riverina's specialisations.

The bubble diagram of industry cluster analysis integrates the degree of specialisation of each industry with the absolute scale and relative change in employment in each industry:

- the size of each bubble reflects the amount of employment in each industry within the Region
- horizontal positioning reflects the differential between local growth in employment in the industry in jobs in the region compared to jobs growth in the industry across the State
- vertical positioning reflects the degree of specialisation in the Region compared to NSW, with bubbles at the top of the chart being more specialised.

The diagram can be understood from various perspectives, but might most easily be interpreted by quadrant.

The main point of focus is the two (blue bubble) upper right quadrant industries. Manufacturing and Agriculture, Forestry & Fishing represent highly specialised industries with relatively high regional employment growth, and should be viewed as a key focus for future opportunities.

Deeper analysis of the Region's industry employment growth, including comparison to whole-of-industry and whole-of-economy trends across the State, suggest some key local trends. Most notably, local factors in the Region have driven large increases in manufacturing jobs against a general trend of employment contraction across the industry.

The lower right quadrant (green bubbles) contains the Western Riverina's two other industries that have seen considerable employment growth compared to broader trends across the State's industries.

Both Construction and Transport, Postal & Warehousing are insufficiently concentrated in the Western Riverina to be considered specialisations relative to the State economy overall. However, their relationship to the Western Riverina's two key 'Engines of Growth' has seen them increase significantly over the five years to 2016.



# Strategy

The three Strategy elements for the Region link directly to the opportunities presented by the Region's endowments, specialisations and core competencies and also aim to address some key regional risks.

The Strategy elements were derived from an analysis of the endowments that underpin the Region's strengths, followed by examination of current industry specialisations and emerging specialisations, identified in consultation with the community and councils.

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.

We have previously established the Western Riverina's key specialisations lie in:

- Engines of Growth in Agriculture and Manufacturing

- Enabling Industries like packaging and utilities providing key inputs like water and energy
- Population Serving activities like education and training and retailing.

The specialisations inform the strategic elements

**1. Develop and grow its Agricultural and Manufacturing 'Engines of Growth'**, emphasising better connections to external markets and enabling greater supply chain integration within the Region

**2. Invest in skills and the supply of key utilities critical to 'Engines of Growth'** production processes, noting in particular energy network constraints

**3. Grow the Western Riverina population and labour pool** to support greater output, specialisation and productivity: through increasing housing supply and enhancing services and liveability.

Beyond these general high level imperatives, four strategy themes, right, guided consultation and analysis were also used to realise detailed strategic directions and actions for developing and growing the Region's economy.

Alignment of strategies and actions across the four themes can be found in the appendices that accompany this Strategy.

## Achieving Better Connectivity



## Leveraging Resources, Skills and Jobs



## Enhancing Liveable Communities



## Engaging in Fresh Thinking



# Strategic Themes for the Primary Specialisations

Primary Specialisations	Connectivity	Resources, Skills & Jobs	Liveability	Fresh Thinking
<b>Engines of Growth</b> <ul style="list-style-type: none"> <li>• Agriculture</li> <li>• Manufacturing</li> </ul>	<ul style="list-style-type: none"> <li>• Better connect producers to their external markets</li> <li>• Enable integration of the supply chain within the Region</li> </ul>	<ul style="list-style-type: none"> <li>• Increase reliability and reduce costs of key inputs like energy, water and skilled labour</li> <li>• Consider industry specific strategies</li> <li>• Foster supply chain integration</li> </ul>	<ul style="list-style-type: none"> <li>• Provide the infrastructure and services that facilitate housing supply and population and labour force growth</li> </ul>	<ul style="list-style-type: none"> <li>• Bring the significant resources and expertise of other governments to bear on the Region's challenges</li> <li>• Look to contain the costs of regulation, taxes and charges to efficient minimums</li> <li>• Take a fresh look at new approaches to partnership with other institutions</li> </ul>
<b>Enabling Industries</b> <ul style="list-style-type: none"> <li>• Water &amp; Energy</li> <li>• Packaging</li> </ul>	<ul style="list-style-type: none"> <li>• See the productivity potential of greater digital connectivity realised</li> </ul>	<ul style="list-style-type: none"> <li>• Support greater specialisation within the Region through a larger labour pool</li> <li>• Address skills gaps inhibiting more population services from being provided from within the region</li> </ul>		
<b>Population Serving</b> <ul style="list-style-type: none"> <li>• Education &amp; Training</li> <li>• Retail</li> <li>• Public Administration</li> </ul>	<ul style="list-style-type: none"> <li>• Physically and digitally connect communities so more of their needs can be serviced from within the Region</li> </ul>	<ul style="list-style-type: none"> <li>• Consider industry strategies, especially for emerging industries</li> </ul>	<ul style="list-style-type: none"> <li>• Identify and foster new population serving services that can make the Region even more attractive to live in</li> </ul>	





## 1. Further Develop the Manufacturing and Agricultural ‘Engines of Growth’

### Strategic Context

The ‘Engines of Growth’ in Agriculture and Manufacturing are the Western Riverina’s most distinctive specialisations. These industries have seen considerable expansions in employment relative to trends prevailing across the State and represent the key opportunities for the Region’s future economic development.

Prospects for these industries can be advanced through a number of measures. Better connections to their external markets, international and domestic, can be achieved through transport infrastructure investment. Better connections within the Region, through both transport and digital connectivity measures, can increase supply chain integration and regional productivity. Finally, streamlining approval processes can help facilitate timely expansions of activity in these sectors over time.

### Infrastructure Priorities

Connect Agriculture and Manufacturing producers to their supply chains and external markets.

### Opportunities

### Early Stage Actions

### Candidate Programs / Projects

- Move freight efficiently within and beyond the Western Riverina
- Connect the Region’s producers to markets through efficient rail links
- Improve regional, national and global connections for people and freight
- Provide people and businesses with reliable, high capacity digital connections
- Realise a better integrated road network through addressing constrained links
- Improve road freight corridor productivity through ongoing corridor investment
- Advocate for integrated planning consents across governments

- Develop a Western Riverina Intermodal Freight Terminal Masterplan
- Develop Western Riverina Regional Airport Masterplan
- Develop a South East NSW Freight study
- Advocate for the implementation of the Newell Highway Corridor Strategy
- Advocate for Corridor Strategies for the Kidman Way and Irrigation Way
- Advocate for Program Business Cases for Kidman Way, Newell Highway and Sturt Highway
- Develop a business case for Griffith Bypass
- Develop a Junee rail branch line business case
- Develop Efficient Rail Link Study – connecting Western Riverina to Port of Melbourne
- Identify and cost key roads and intersections to “last mile” and “first mile” constraints
- Audit digital connectivity blackspots in collaboration with the private sector
- Review costs of delays in approving development applications, and work across governments and agencies to streamline planning consents

- Western Riverina Intermodal Freight Terminal
- SunRice Freight Intermodal Project
- Western Riverina Regional Airport Master Program
- Western Riverina Freight Corridor Program
- Last Mile Constraints Improvement Program
- Improving and upgrading bridges across the Western Riverina



## 2. Invest in Skills and Key Utilities to Better Enable the 'Engines of Growth'

### Strategic Context

To make the most of its 'Engines of Growth' Agriculture and Manufacturing specialisations, the Western Riverina should focus on opportunities to enhance the key inputs the production processes in those industries rely on.

Key production inputs for the Engines of Growth include labour, energy and water. Strategic priorities include developing closer partnerships between industry and training providers, so skills development is more productive; increasing the reliability of energy supply for manufacturers; promoting expertise in water management and working together to advocate for the Western Riverina's interests in national water reform processes. Over time, industry specific strategies can be considered to support development of potentially emerging specialisations in enabling industries (Construction & Transport Postal and Warehousing) that support the 'Engines of Growth'.

### Infrastructure Priorities

Increase energy supply and security for the Region's manufacturers.

### Opportunities

### Early Stage Actions

### Candidate Programs / Projects

Opportunities	Early Stage Actions	Candidate Programs / Projects
<ul style="list-style-type: none"> <li>• Help training providers offer courses that better align with local industry needs</li> <li>• Establish pathways from school, through training, to meaningful and productive jobs</li> <li>• Increase certainty in water supply to support longer term investment decisions</li> <li>• Promote diverse employment opportunities for men and women in the Region</li> <li>• Activate industrial land with enabling infrastructure</li> <li>• Increase the capacity, reliability and affordability of energy supply</li> <li>• Expand migrant settlement to Western Riverina to address labour shortages</li> </ul>	<ul style="list-style-type: none"> <li>• Partner with TAFE NSW, local industries and training providers in initiatives like 'Western Riverina - Grow Our Own' to review training gaps and align training courses to local needs and workforce shortages</li> <li>• Foster close links between private operators and the Agribusiness SkillsPoint in Griffith</li> <li>• Collaborate with the private sector, TAFE NSW and training providers to encourage women to join the workforce</li> <li>• Facilitate the establishment of a Country Universities Centre in Griffith and Leeton</li> <li>• Collaborate with private sector, TAFE NSW and training providers to establish pathways from school into meaningful employment</li> <li>• Develop an Employment Lands Strategy</li> <li>• Work with irrigation network providers to identify and advocate for further improvements in water network infrastructure</li> <li>• Partner with energy suppliers to determine infrastructure requirements and costs to supply reliable and affordable energy</li> <li>• Advocate for more indigenous business and service provision opportunities in the Region</li> <li>• Develop a migrant settlement strategy</li> <li>• Attract skilled workers and their families to the Region</li> </ul>	<ul style="list-style-type: none"> <li>• Education, Training and Employment Programs, including the Western Riverina 'Grow Our Own' program</li> <li>• Upgrade Irrigation System Program</li> <li>• Energy Supply Program</li> </ul>



### 3. Grow the Western Riverina’s Population and Labour Pool

#### Strategic Context

Growing the Region’s population and labour pool is a key imperative in the Western Riverina. Unemployment rates across the Region are persistently low compared to prevailing averages for regional NSW and NSW. Limited availability of workers constrains output among its ‘Engines of Growth’ specialisations and makes the task of sourcing new workers during expansions of operations especially difficult. A larger population base will also expand activity and improve economies of scale in the Region’s internal markets across Enabling and Population-Serving Industries.

Growing the population emphasises the need to attract and retain people. This immediate focus is on steps increasing housing supply, complemented by enhancements to the liveability of the Western Riverina’s communities through increased social amenities, improved education, childcare and health services, and pursuing new partnerships with other levels of government to accelerate the Region’s economic and social development.

#### Infrastructure Priorities

Enabling infrastructure to increase housing supply and further enhance key community amenities and services

#### Opportunities

- Match school infrastructure services with student needs
- Resolve “first mover” disadvantage of incurring enabling infrastructure costs
- Realise a diverse supply of housing types to meet the needs of the community
- New approaches to collective partnership in health care services across Western Riverina
- Celebrate and embrace indigenous and multicultural heritage
- Improve access to cultural, sporting and social recreational facilities and services across the Region
- Provide affordable and reliable water and treatment services for Western Riverina’s communities
- Pursue new and transformative partnerships across the local, state and federal government

#### Early Stage Actions

- Identify school asset investment opportunities to advocate for contemporary, future focused learning spaces
- Develop a regional catalogue of residential lands for activation and proactively seek funding opportunities for enabling infrastructure to accelerate housing supply
- Develop a housing diversity strategy
- Develop a holistic Western Riverina Health Network Plan to identify gaps and ways of making services more accessible
- Increase the branding and awareness of the Region’s indigenous and multicultural heritage
- Undertake a gap analysis of social recreational facilities and services in the Western Riverina compared to similar locations
- Develop CBD beautification strategies for Western Riverina’s major centres
- Form a proactive and collaborative relationship with State and Commonwealth governments to implement a smart cities plan
- Identify candidate transformative infrastructure projects that could support a City Deal

#### Candidate Programs / Projects

- Western Riverina Health Service Program
- Sewage, Waste and Water Treatment Program
- Sporting Complex and Precinct Program
- Art and Indigenous Centre Program
- Western Riverina Housing Diversity Program
- CBD Enhancement Program

# Western Riverina Enablers Table

## Strategies and Early Stage Actions

Enablers	Develop the Engines of Growth	Invest in Skills and Key Utilities	Grow the Population and Labour Pool
People and Skills	<ul style="list-style-type: none"> <li>Identify and cost key roads and intersections to “last mile” and “first mile” constraints in collaboration with the private sector</li> <li>Advocate for Program Business Cases for the Newell Highway, Sturt Highway and Kidman Way</li> </ul>	<ul style="list-style-type: none"> <li>Partner with TAFE NSW, local industries and training providers in initiatives like ‘Western Riverina - Grow Our Own’ to review training gaps and align training courses to local needs and workforce shortages</li> <li>Foster close links between private operators and the Agribusiness SkillsPoint in Griffith</li> <li>Collaborate with the private sector, TAFE NSW and training providers to encourage women to join the workforce</li> <li>Advocate for more indigenous business and service provision opportunities in the Region</li> <li>Attract skilled workers and their families to the Region</li> </ul>	<ul style="list-style-type: none"> <li>Identify school asset investment opportunities to advocate to the NSW government to provide contemporary, future focused learning spaces</li> <li>Increase the branding and external awareness of the Region’s indigenous and multicultural heritage</li> </ul>

# Western Riverina Enablers Table

## Strategies and Early Stage Actions

Enablers	Develop the Engines of Growth	Invest in Skills and Key Utilities	Grow the Population and Labour Pool
<p>Government, regulation, services and information</p>	<ul style="list-style-type: none"> <li>• Develop a Western Riverina Intermodal Freight Terminal Masterplan</li> <li>• Develop South East NSW Regional Freight study</li> <li>• Progress implementation of the Newell Highway Corridor Strategy</li> <li>• Develop Corridor Strategies for the Kidman Way and Irrigation Way</li> <li>• Develop a Business Case for Griffith Bypass</li> <li>• Develop a Business Case for upgrading the Junee rail branch line</li> <li>• Develop Efficient Rail Link Study – connecting Western Riverina to Port of Melbourne</li> <li>• Audit digital connectivity blackspots in collaboration with the private sector</li> <li>• Develop Western Riverina Regional Airport Masterplan</li> <li>• Review costs of delays in approving development applications, and work across governments and agencies to streamline planning consents</li> </ul>	<ul style="list-style-type: none"> <li>• Facilitate the establishment of a Country Universities Centre in Griffith and Leeton</li> <li>• Develop a migrant settlement strategy</li> <li>• Consider implementing the draft Riverina Murray Destination Management Plan 2018</li> </ul>	<ul style="list-style-type: none"> <li>• Develop an Employment Lands Strategy</li> <li>• Develop a regional catalogue of residential lands for activation and proactively seek funding opportunities for enabling infrastructure to accelerate housing supply</li> <li>• Develop a holistic Western Riverina health network plan to identify gaps and ways of making services more accessible</li> <li>• Undertake a gap analysis of social recreational facilities and services in the Western Riverina compared to similar locations</li> <li>• Develop CBD beautification strategies for Western Riverina’s major centres</li> <li>• Develop Western Riverina housing diversity strategy</li> <li>• Form a proactive and collaborative relationship with State and Commonwealth governments to implement a smart cities plan</li> <li>• Identify candidate transformative infrastructure project(s) to support a City Deal</li> </ul>

# Western Riverina Enablers Table

Strategies and Early Stage Actions			
Enablers	Develop the Engines of Growth	Invest in Skills and Key Utilities	Grow the Population and Labour Pool
Infrastructure	<ul style="list-style-type: none"> <li>• Digital Connectivity</li> <li>• Intermodal Terminals</li> <li>• Road and bridge Infrastructure</li> <li>• Rail Infrastructure</li> <li>• Airport Infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>• Work with irrigation network providers to identify and advocate for further improvements in water network infrastructure</li> <li>• Partner with energy suppliers to determine infrastructure requirements and costs to supply reliable and affordable energy</li> </ul>	<ul style="list-style-type: none"> <li>• Schools infrastructure</li> <li>• Cultural infrastructure</li> <li>• Recreation infrastructure</li> <li>• Medical Infrastructure</li> </ul>
Utilities	<ul style="list-style-type: none"> <li>• Improved reliability of electricity supply</li> </ul>	<ul style="list-style-type: none"> <li>• Extend services to activate industrial lands</li> <li>• Improvements to water supply infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>• Improved reliability of electricity supply</li> <li>• Extend Services to residential lands</li> <li>• Waste Disposal Stations</li> <li>• Improvements to water supply infrastructure</li> </ul>



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# Implementation Plan

Strategy implementation will be overseen by an Economic Advisory Panel comprised of each council's General Manager, drawing on their staff and broader stakeholders as appropriate.

The effective implementation of the Strategy will involve the key stakeholders and regional community that contributed to its development, including all five 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.

The five council General Managers will meet regularly to track progress and liaise with the Regional Director, Western, NSW Department of 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 initiate the conduct of a formal review of the Action Plan and associated governance processes, producing 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 in view of key economic, social, environmental and policy changes.

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



