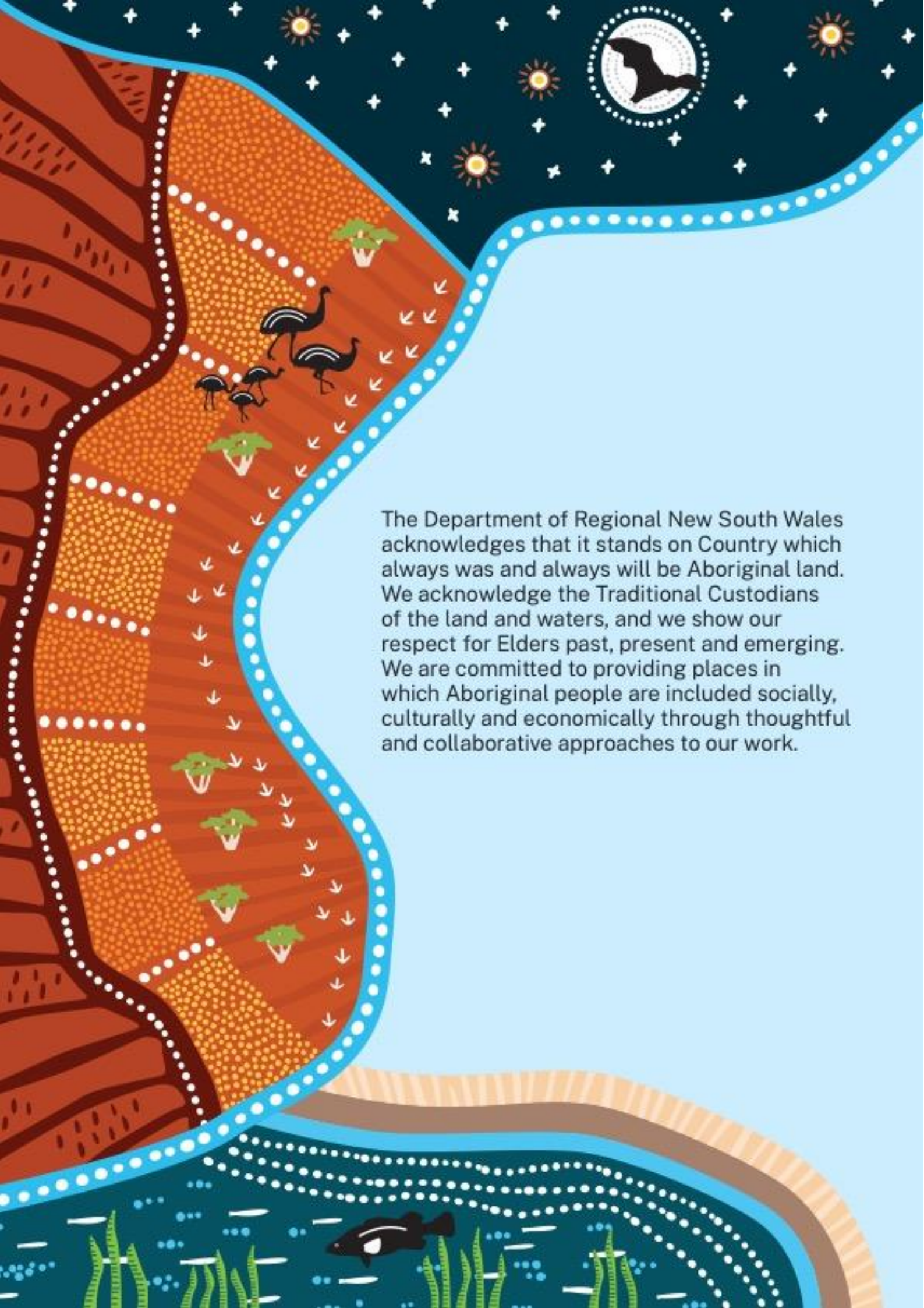


Central Orana Regional Economic Development Strategy – 2023 Update





The Department of Regional New South Wales acknowledges that it stands on Country which always was and always will be Aboriginal land. We acknowledge the Traditional Custodians of the land and waters, and we show our respect for Elders past, present and emerging. We are committed to providing places in which Aboriginal people are included socially, culturally and economically through thoughtful and collaborative approaches to our work.

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The Department of Regional NSW would like to acknowledge the significant contribution of many stakeholders in the Central Orana region to the development of the 2023 REDS Update, with particular thanks to staff from Dubbo Regional Council and Narromine Shire Council. The Department of Regional NSW also acknowledges the assistance provided by PricewaterhouseCoopers and ProjectsJSA to help deliver the 2023 REDS Update project.

On Country – Artwork by Mumbulla Creative

"On Country" captures the many different countries located within the Department of Regional NSW footprint. Only part of the image is shown on the Acknowledgement of Country page. The regions included in this partial image are detailed below.

The Far West region of NSW is represented by red earth plains, mallee scrubs and an abundant emu population. Freshwater countries are referenced by the expansive network of rivers stretching through the regions. The Riverina Murray region is represented by the roots of a river redgum on the banks of a river, and a large Murray Cod can be seen in the river. The night sky features as it plays an important navigational and story-telling role in traditional life.

Cover image: Dubbo skyline at night. Photo credit: Dubbo Regional Council.

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1. Executive Summary

Changes in the Central Orana region since 2018

In 2018, the NSW Government developed Regional Economic Development Strategies (REDS) for 38 Functional Economic Regions (FERs) across regional NSW. Since publication, regional NSW has endured shocks including bushfires, floods, COVID-19 and the mouse plague, and significant new economic opportunities have emerged. The 2023 REDS Update provides an updated evidence base to guide governments in making policy and investment decisions to enhance resilience and drive sustainable, long-term economic growth in regional NSW.

The Central Orana region has seen significant investment delivered since 2018, with major projects in the planning or delivery stages



The **\$306 million Dubbo Hospital redevelopment**, including the Western Cancer Centre.



The **Central West-Orana Renewable Energy Zone (REZ)** is set to deliver 3,900 jobs, with more than **\$1.8 billion** already committed to deliver approved **wind and solar farms**.



Transport infrastructure projects including major upgrades to the Mitchell Highway, Narromine to Narrabri Inland Rail and the Regional Rail - Mindyarra Maintenance Centre



Over **\$50 million** to expand facilities and deliver new experiences at **Taronga Western Plains Zoo**

The region has recorded significant population growth since 2018 and decreasing housing vacancy rates, which brings opportunities and challenges



+ 3.1% increase in the population between 2018 and 2021.



Housing vacancy rates sit **below 2%**, with median house prices having risen more than **30%** across the region since 2018.



The proportion of the population **aged 20-54 years** has **decreased by 0.3%** since 2018.



Unemployment has increased since 2018 but remains broadly in line with the NSW average, while job vacancies in the broader region reached an all-time high of **1,819** in 2021.

The tourism, agriculture and food manufacturing sectors continue to drive economic growth in Central Orana



Tourism

+ **3.3%** Year-on-Year (YoY) growth from 2011-2020

\$ 333 million visitor spend in 2021

4,877 jobs supported in 2021



Electricity supply (incl. renewables)

+ **3.2%** YoY growth from 2011-2020

\$ 95 million Gross Value Added (GVA) in 2020

394 jobs supported in 2021



Agriculture

+ **6.3%** YoY growth from 2011-2020

\$ 250 million GVA in 2020

1,819 jobs supported in 2021



Manufacturing

+ **1.3%** YoY growth from 2011-2020

\$ 205 million GVA in 2020

1,384 jobs supported in 2021

Key themes from local consultation

Stakeholders from the Central Orana region highlighted housing supply, sustainable economic development considering major project investment, and enhancing liveability as key priorities.

Housing availability



Current housing availability challenges may worsen in the face of a growing population and a need to house workers associated with major project delivery.

Taking a long-term view on major projects



The region must focus on ensuring long-term benefits are delivered to communities to ensure major projects do not lead to a boom-bust sequence of events.

Investing in the essentials



Enhancing liveability for both residential amenity and facilitating the attraction and retention of skilled workers to support industry growth was highlighted as a key priority for the region.

Central Orana REDS – 2023 Update strategies and enablers

Strategies	Enablers
<p>Continue to grow Central Orana’s capabilities in agriculture and associated value-add activities.</p>	<ul style="list-style-type: none"> Facilitate formal partnerships and collaboration between local manufacturing, agricultural and other key industries to enable climate resilient and value-added manufacturing products.
<p>Establish Central Orana as an innovative and connected business destination.</p>	<ul style="list-style-type: none"> Maintain investment in freight and logistics precincts and intermodal hubs, and work collaboratively to address road and rail freight barriers on key transport routes servicing the western catchment area. Support councils to use the Connectivity Index Tool following its 2023 release to identify priority locations for upgrades to telecommunications infrastructure to support business innovation and productivity. Support innovative actions and projects by Taronga Western Plains Zoo and local university campuses to support growth in science, technology, engineering and mathematics (STEM) focused job opportunities.
<p>Capitalise on the growth potential of the mining and construction sectors to boost related clusters in energy, manufacturing, and transportation.</p>	<ul style="list-style-type: none"> Support further investigation into leveraging investment in the REZ to grow local supply chains to serve the needs of the community and the REZ, including through local manufacturing, critical minerals mining opportunities and value-add processing activities.
<p>Develop a mature and diversified visitor economy.</p>	<ul style="list-style-type: none"> Invest in growing the sports and recreation infrastructure offering to develop the region as a hub for regional sporting events. Explore opportunities to expand air connections between Dubbo and surrounding areas to target the attraction of overseas visitors and communities.
<p>Grow the region’s workforce through developing local skills capacity and enhancing liveability to support workforce attraction and retention.</p>	<ul style="list-style-type: none"> Support worker attraction and retention by collaborating with industry to identify worker attraction, skills, and training priorities (including those associated with skilled migration) for the region’s engine and emerging industries. Examine the current and projected housing supply needs through a Regional Housing Delivery Plan, including consideration of the impact of major projects and future growth pressures.

2. About the 2023 REDS Update

In 2018, the NSW Government and local councils developed a series of REDS for 38 Functional Economic Regions (FERs) across regional NSW. FERs are made up of one or more Local Government Areas (LGAs) that work together to create smaller economies with strong economic links.

Supporting the *20-Year Economic Vision for Regional NSW*, the REDS set out a place-based vision and framework for economic development for each FER. The REDS identify each FER's endowments, industry specialisations and key vulnerabilities and opportunities, and outline economic development strategies and actions to leverage these strengths.

Since 2018, regional NSW has endured many challenges including drought, bushfires, floods, COVID-19 and the mouse plague. At the same time a range of broader state-wide trends and actions continue to change the economic landscape across regional NSW, including digital transformation, increased remote working and the shift towards net zero. These challenges and trends have altered the landscape of economic development in many regions and created new opportunities for growth.

The 2023 REDS Update provides an updated evidence base to guide governments in making policy and investment decisions to enhance resilience and drive sustainable, long-term economic growth in regional NSW. The objectives of the update are to:

1. **Highlight progress:** reflect on significant initiatives and investments that have supported progress against the key strategies and actions in the 2018 REDS.
2. **Capture major changes:** identify and assess the impacts of major changes to regional economies since 2018, including the effect of recent 'shocks' such as bushfires, droughts, floods, mouse plagues and the COVID-19 pandemic.
3. **Identify strategic opportunities:** identify key strategic opportunities and vulnerabilities for engine and emerging industries, as well as any changes to local endowments.
4. **Set the foundation for the future:** review, affirm and/or adjust the 2018 strategies, including consideration of new strategies to meet emerging priorities, to ensure they remain relevant.
5. **Identify key enablers to guide future action:** develop a non-exhaustive list of priority enabling actions that will support the 2023 REDS Update strategies.



Figure 1: Wellington Caves. Photo credit: Dubbo Regional Council.



Figure 2: Visiting Old Dubbo Gaol. Photo credit: Dubbo Regional Council.

3. About the Central Orana region

The Central Orana FER is situated in central western NSW and is comprised of the Dubbo Regional and Narromine Local Government Areas (LGAs). Dubbo is the key population centre and a major regional city, with Narromine, Trangie and Wellington other significant towns in the region, alongside a range of smaller villages and localities.

Total area covered (km ²)	8,689
Population (2021)	61,966
Dubbo Regional	55,518
Narromine	6,448
Size of the economy (2020)	\$3.758 billion
Total employment (2021)	27,552

Source: ABS (2021) Estimated Resident Population, REMPLAN (2020), ABS Census (2021).








Figure 3: Map of the Central Orana Functional Economic Region. Map data ©2023 Google.

4. The 2018 Central Orana REDS






In the Central Orana REDS, the region was actively pursuing growth of its key industry specialisations, particularly tourism and agriculture. Endowments recognised in the document spanned natural, social and infrastructure assets, many of which were central to the strategy's approach to enabling economic development for the region. These endowments and specialisations are highlighted on pages 10 and 11.

2018 Central Orana strategies

	Establish Central Orana as a centre of excellence for agricultural research to underpin the region's strengths in the agricultural sector.
	Develop the logistics cluster to accompany the anticipated growth in export-oriented sectors.
	Establish Central Orana as an effective and interconnected business destination.
	Capitalise on the growth potential of the mining and construction sectors to boost related clusters in energy, manufacturing, and transportation.
	Develop a mature and diversified tourism sector.
















2018 Central Orana specialisations

The primary industry specialisations below were identified as comparative advantages for the Central Orana region in the 2018 REDS, based on employment concentrations in industry sectors.

	Agriculture, forestry and fishing
	Mining
	Tourism
	Manufacturing
	Transport, postal and warehousing

2018 Central Orana endowments

The Central Orana region is home to a wealth of physical, institutional, built, and human endowments. These endowments play a key role in enabling success and growth across its 2018 industry specialisations of agriculture, mining, manufacturing, transport, and tourism.

Endowments	Relevant 2018 specialisation
Macquarie River	
Burrendong Dam	
Lachlan Orogen Resource Area	
Proximity to the geographic median of Sydney, Melbourne, Brisbane and Adelaide	
Taronga Western Plains Zoo	
Old Dubbo Gaol	
Wellington Caves	
Dubbo Conservatory	
Undeveloped resource deposits	
Human capital (even demographic spread)	
Newell Highway	
Dubbo City Regional Airport	
Institutional endowments (RDA, Councils, Business Chambers and Industry Associations, Local Aboriginal Land Council)	
TAFE Western NSW	
Charles Sturt University	

5. The big picture: Shocks and trends impacting the Central Orana region since 2018



Figure 4: Aerial view of farmland in the Narromine LGA. Photo credit: Narromine Shire Council.

Significant events impacting major industries

The Central Orana region has felt the impact of successive shocks to its economy and communities since 2018, including a sustained period of drought, bushfires, floods, severe storms, a mouse plague and the COVID-19 pandemic. These events had an impact on the wellbeing of local residents, as well as on local industry productivity. From 2018 to 2022, the region had 6 disaster declarations and received \$59.13 million in disaster recovery grants.^[1]

Drought

The Central Orana region experienced drought from 2018 to 2020. The drought was the worst on record for the region, with inflows 70% less than the previous recorded drought period.^[2] This event had serious repercussions for community and industry, with town water allocations reduced and some irrigators restricted to using only 20% of their entitlement. Environmental impacts were also seen, with substantial reductions in the water oxygen and water quality levels of local river systems.^[2]

There was also a notable reduction in tourist visitation in late 2019 due to water shortages in the region which impacted the attractiveness of natural endowments and overall visitor amenity.^[3]

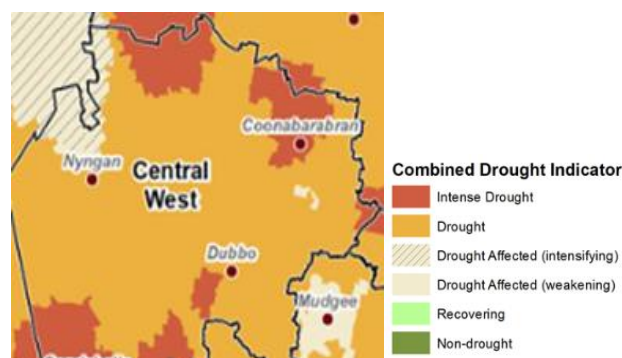


Figure 5: Combined Drought Indicator; 12 months to 31 December 2019 (Department of Primary Industries (DPI), 2022).

Bushfires

A confluence of factors – drought, high temperatures and low humidity led to a significant bushfire event in the Goonoo Forest in October 2019.^[4] This followed a smaller blaze in 2018, and a subsequent fire in early 2020 that threatened a number of properties in the region.^[5] The proximity of the forest to major population centres including Dubbo and major roads (Newell, Castlereagh, and Golden Highway) demonstrates the potential risk that bushfire events pose to the region’s communities, infrastructure and industry.^[6]

Mouse Plague

The Central Orana region was significantly impacted by the mouse plague experienced in 2021. The abundance of mice caused substantial damage to newly planted and growing crops, destroyed stored grain and hay, and significantly damaged key infrastructure, residential properties and equipment.^[7]

This represented a significant cost impost and negative impact on the productivity of the local engine industry of agriculture, with some estimates putting the cost to agriculture across NSW as high as \$1 billion.^[8] The mouse plague also caused major damage to household property and public assets across the Central Orana region.^[9]

To support impacted communities, the NSW Government made available up to \$95 million for primary producers in financial need, and \$45 million for the Small Business and Household Mouse Control Rebate. In the Central Orana region, a total of \$4.05 million was paid to 7,963 small business and household recipients under the rebate program.^[10]

COVID-19

Beyond natural disasters, the Central Orana region has also experienced shocks since 2018 in the form of the widespread impacts of the COVID-19 pandemic. Businesses were impacted by successive periods of lockdown, with 52% of businesses reporting that COVID-19 had negatively affected their business.^[11] The local community was also affected by the pandemic, with JobSeeker recipients increasing by 41% and health care card recipients by 23% from March to June 2020.^[12]

Floods



A period of sustained, heavy rainfall in late 2021 brought about flash flooding events in the region. Beyond damage to residential stormwater systems, the event caused significant damage to sewer systems and led to the closure of many roads in the area.^[13] Unsealed roads were particularly impacted, with Dubbo Regional Council closing all unsealed roads for a period of 6 days in November 2021.^[14] These closures had impacts on physical accessibility for rural based residents and industry, with flow-on impacts to key specialisations for the region, including agriculture and transport.

Severe weather and flooding again impacted the region on multiple occasions in the second half of 2022 with both LGAs being disaster declared during this period. These prolonged flooding events caused damage to businesses and property within the region, including flooding of major riverside shopping centres in October 2022.^[15]

Extended periods of flooding significantly impacted agricultural production in the region, with major impacts on a range of key crops including wheat, canola and barley.^[16] Many roads in the region were again cut off for extended periods, with many rural properties isolated for extended periods due to sustained flooding.^[17]

Macroeconomic trends shaping the region’s future

Macro trends related to climate, migration and global supply chains have played a significant role in the development of the Central Orana region since 2018 and are likely to continue to have a strong influence on its future. The region faces both opportunities and risks in building resilience against their impacts and leveraging competitive advantages that exist for the region.

Trend		Opportunities and risks
 <p>Digital Transformation</p>	<p>The adoption of technology in agriculture, known generally as agtech, has been identified as a significant opportunity for the industry. Some estimates project that digital technologies can increase the gross production value of the Australian agriculture sector by \$20 billion.^[18] Stakeholders reported the region had seen increased adoption of agtech since 2018, however blackspots remain that impede acceleration of digitisation in the sector.</p> <p>Restrictions on face-to-face learning also had implications for the delivery model of local institution such as Charles Sturt University (CSU), which delivered easier access to online learning for more rural or remote students, while those accustomed to living and studying in Dubbo and the institution itself faced challenges due to restrictions.^[19]</p>	<p>Continuing to identify blackspots across the region and investing to address them can aid agtech uptake.</p> <p>Supporting the continuation of online learning in collaboration with industry can assist in developing the local skills base and addressing key skills gaps.</p>
 <p>Changing Migration Patterns</p>	<p>The reduction of international migration as a result of the COVID-19 pandemic had a detrimental impact on labour supply across NSW, including significant implications for agriculture given its reliance on migrant workers in some parts of the sector.^[20]</p> <p>The Orana Designated Area Migration Agreement (DAMA), in-place since 2019, can provide significant support to the region as it looks to rebuild and develop the region's workforce post the COVID-19 pandemic.^[21]</p> <p>The COVID-19 pandemic has also triggered a period of unprecedented migration to the region. This is evident in the population shift in 2020-21, with regional NSW gaining an additional 26,800 residents while Sydney declined by 5,200.^[22] The Central Orana region was already experiencing sustained population growth prior to the COVID-19 pandemic, but a lasting trend of more people shifting to regional areas would continue to support this growth going forward.</p>	<p>Leveraging the DAMA to increase pathways for temporary workers to become permanent residents that can enhance the skilled workforce will assist the region in addressing key skills gaps.</p> <p>Sustained population growth may increase pressure on housing availability and affordability, but create greater demand for goods and services, which can support business and industry growth.</p>

















Trend	Opportunities and risks	
 <p data-bbox="92 360 272 427">Towards Net Zero</p>	<p data-bbox="368 257 1066 600">The region faces challenges and opportunities as a result of the push toward decarbonisation and net zero targets. The region has significant resource endowments which extend to critical mineral supplies, placing it in an advantageous position for providing inputs to support the shift towards net zero.^[23] The Central West-Orana REZ presents a significant opportunity for the region to lead the way in renewable energy generation and transmission.</p> <p data-bbox="368 618 1066 786">Meanwhile, the agriculture and transport sectors, both significant engine industries for the region, may face medium to longer term challenges in meeting decarbonisation targets as net zero policy progresses.</p>	<p data-bbox="1139 257 1437 495">The Central Orana region has significant opportunity to leverage its natural endowments to drive investment in new energy generation.</p> <p data-bbox="1139 512 1449 855">While the region’s mining industry shows promise of growth through critical minerals mining, the industry will face the concurrent challenge of decarbonizing processes to meet net zero targets.</p>
 <p data-bbox="92 999 256 1066">Rising Uncertainty</p>	<p data-bbox="368 907 1070 1211">The Central Orana region is set to be home to several major projects in coming years, including the Inland Rail extension and Central West-Orana REZ projects. While these projects offer significant growth opportunities, ensuring long-term, equitable benefits for all the community can be challenging, and there is a clear need to ensure a boom-bust cycle is avoided when the investment intensive construction phase ends.</p> <p data-bbox="368 1229 1054 1332">Major projects in the region may also be affected by ongoing global supply chain uncertainty, which can impact project delivery costs and timelines.^[24]</p>	<p data-bbox="1139 907 1449 1279">The region’s strengths in primary industries and manufacturing may provide an opportunity for expansion of local value-add processing to meet materials demand impacted by supply chain challenges.</p>



Figure 6: Wellington Caves Visitor Centre, Dubbo LGA. Photo credit: Dubbo Regional Council.

6. Responding to change: Initiatives and investments since 2018

Since 2018, local councils, the NSW Government and other key organisations have delivered new and updated strategic documents and plans that help guide economic and community development in the region. These documents support the development of local enabling actions that contribute towards progress against key REDS priorities and strategies.

Strategies and plans	Relevant 2018 strategies
<p>The Central West and Orana Regional Plan 2041 seeks to leverage the region's natural endowments to develop its engine industries and diversify its economy, as a way to support enhanced resilience across the community.</p>	
<p>Both councils have prepared their Local Strategic Planning Statement, which sets out land use strategies to facilitate industrial, commercial and residential development that maximises community and economic benefits.</p>	
<p>Both Dubbo Regional Council and Narromine Shire Council have updated their Community Strategic Plans (CSPs), with a clear focus on enhancing liveability and developing diverse, resilient economies.</p>	
<p>In their Regional Economic Recovery Strategies, both councils highlight the need to develop a more diverse and resilient economy in the region following the COVID-19 pandemic and climate-related shocks.</p>	
<p>The Narromine Social Plan 2019-2021 supports social priorities identified in the CSP, with the goal of fostering a healthy, connected, and liveable community.</p>	
<p>The Dubbo Cultural Plan 2020-2025 seeks to support growth of the arts and cultural sector, so to facilitate growth in tourism and enhance local amenity.</p>	
<p>The Wellington Town Centre Plan provides a strategic framework to revitalise the town centre and create a safe, attractive and vibrant centre for the future.</p>	
<p>Establishment of the Orana Regional Designated Area Migration Agreement in 2019 provides the region with an opportunity to grow its skilled labour force through an enhanced ability to attract skilled international migrants.</p>	
<p>The Australian Government's 2022 Critical Minerals Strategy and the NSW Government's Critical Minerals and High-Tech Metals Strategy will help guide growth in the critical minerals sector in the Central Orana region.</p>	
<p>The declaration of the Central West-Orana REZ provides a significant opportunity for growth of the green energy sector in the region.</p>	
<p>Formation of the industry development corporation O2N will foster enhanced collaboration and networking opportunities among industry stakeholders.</p>	
<p>The Country and Outback NSW Destination Management Plan 2022-2030 sets out a collaborative framework to guide growth of the region's visitor economy.</p>	
<p>The draft Macquarie-Castlereagh Regional Water Strategy presents a 20-year strategy with a key objective of improving security and certainty of water resources across the region.</p>	
<p>The draft Future Transport 2056 Central West and Orana Regional Transport Plan provides a blueprint for how Transport for NSW will respond to the key transport needs of the region, including active travel and public transport.</p>	

Significant investments since 2018

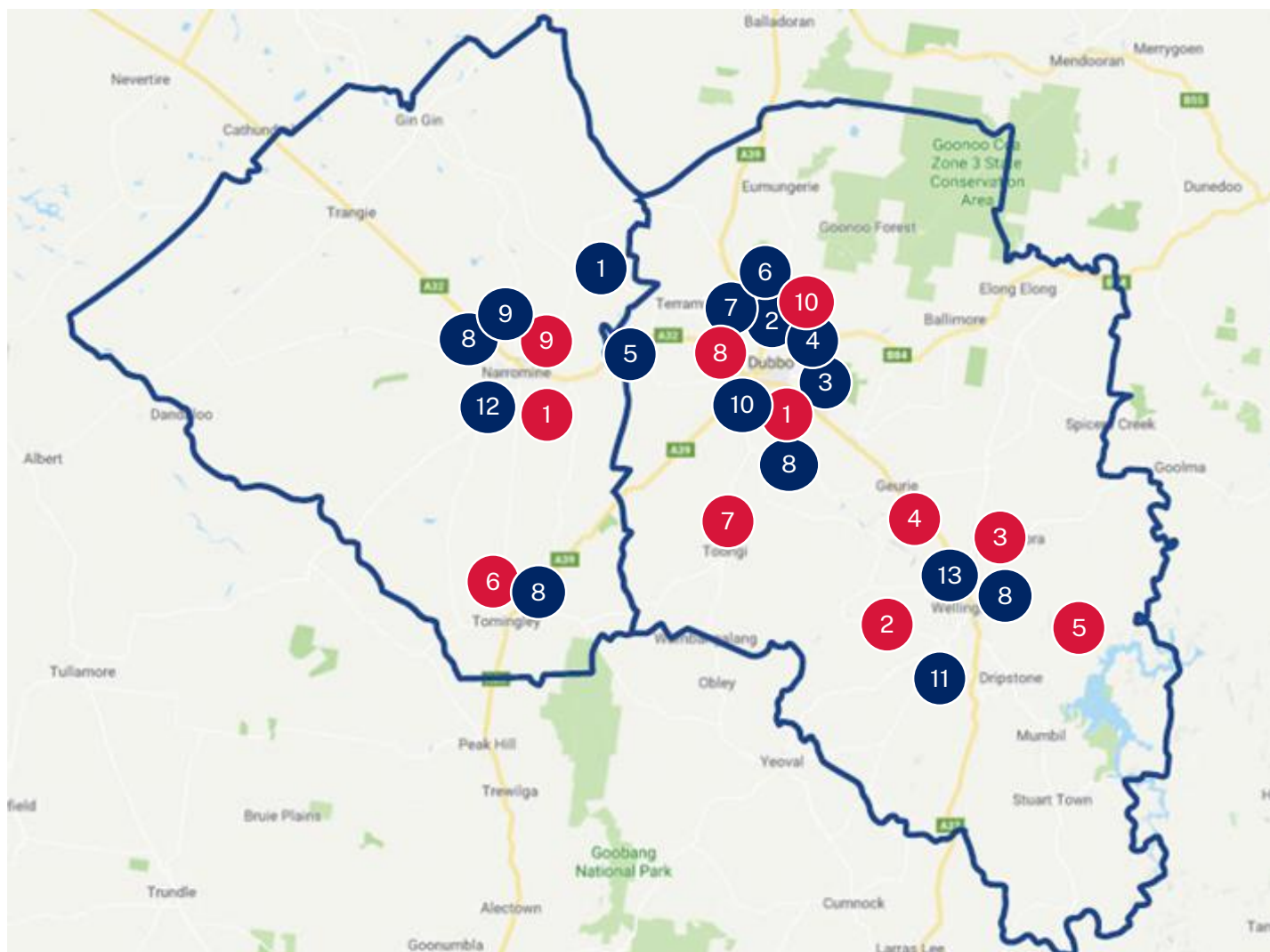


Figure 7: Map highlighting significant investments in the Central Orana region since 2018. Map data ©2023 Google

Since 2018 the region has received significant local, state and federal funding, as well as major private investment. These investments are at varying stages of progress, with some delivered, some underway, and some still in the planning stage. Public investments have focused on transport infrastructure, supporting industry development, and pursuing growth in the visitor economy. Grant funding has played a key role in delivery of many of these projects.

Major private investment since 2018

Investment	Estimated total project value(s)	Relevant 2018 strategies
1 Major subdivisions -Dappo Road Narromine and Southlakes Estate Dubbo	Not available	
2 Suntop Solar Farm	\$262 million	
3 Wellington North Solar Farm	\$540 million	

4	Maryvale Solar Farm and Battery	\$250 million	
5	Uungula Wind Farm	\$820 million	
6	Tomingley Gold Mine extension project	\$87 million	
7	ASM Dubbo Critical Minerals Project - enabling infrastructure ¹	\$20.4 million	
8	Leading Edge Data Centre, Dubbo	\$11 million	
9	Narromine Advanced Manufacturing Hub ²	\$32 million	
10	Fletchers International facility upgrade ²	\$14 million	





Major public investment since 2018

Investment	Estimated total project value(s)	Relevant 2018 strategies	
1	Narromine to Narrabri Inland Rail	>\$1.2 billion	
2	Dubbo Hospital redevelopment	\$306 million	
3	Regional Rail - Mindyarra Maintenance Centre ³	\$2.8 billion	
4	New Dubbo Bridge	\$220 million	
5	Mitchell Highway upgrades	\$32 million	
6	Dubbo Regional Airport upgrades	\$17.5 million	
7	Police Force training facility and Rural Fire Service Aviation Centre of Excellence	\$41.4 million	
8	Narromine Aviation Business Park and Skypark Residential developments	\$5.3 million	
9	Water security projects - Dubbo Borefield Project, Narromine groundwater upgrade, Wellington groundwater pipeline project, Tomingley Water Treatment Plant	\$32.7 million	

¹ Project supported by a grant through the NSW Government's Critical Minerals and High-Tech Metals Activation Fund.

² Project supported by a grant through the NSW Government's Regional Job Creation Fund.

³ \$2.8 billion is the total Regional Rail Project cost, including fleet purchase, Mindyarra Maintenance Centre cost, and 15-year maintenance contract.

10	Taronga Western Plains Zoo - Serengeti Plains experience, Wildlife Hospital and Platypus Refuge ¹	\$53.4 million	
11	Wellington Caves Visitor Experience upgrade	\$4.2 million	
12	Narromine Wetlands upgrades	\$3 million	
13	Wellington Aquatic and Leisure Centre	\$8.9 million	

¹ The major projects at the Western Plains Zoo have also been supported by philanthropic and private donations.

Regional grant programs

The region has received \$170.29 million in approved grant funding since 2018. Key programs in the region have included the Stronger Country Communities Fund, with \$16.16 million committed to a range of projects including new recreation facilities and streetscape upgrades.

Grant category	Approved funding
Community	\$36.26 million
Economic	\$74.90 million
Disaster recovery	\$59.13 million

Note: Total grant funding outlined above only includes programs managed by the Department of Regional NSW, accurate as at January 2023.



Figure 8: Walking out of Dubbo City Regional Airport. Photo credit: Dubbo Regional Council.

7. Central Orana region 2023 economic snapshot

Central Orana region's population is growing, with a relatively high proportion of residents under 20 years of age

The Central Orana region has seen consistent population growth since 2016, with this trend expected to continue, and there is a need to focus on developing social infrastructure to support and retain young families in the region. The need for social infrastructure will be reinforced by workforce needs and population growth associated with major projects, such as the Central West-Orana REZ.

Population growth

The Central Orana region has experienced a sustained period of ongoing substantial population growth (see Figure 9). Central Orana's population grew by a cumulative total of 3.1% in the period from 2018 to 2021, adding over 1,800 people to the region.

Despite a state-wide trend of increased internal migration to the regions as a result of the COVID-19 pandemic, Central Orana's population growth rate eased between 2018 and 2021, after a marked increase in 2016 and 2017.

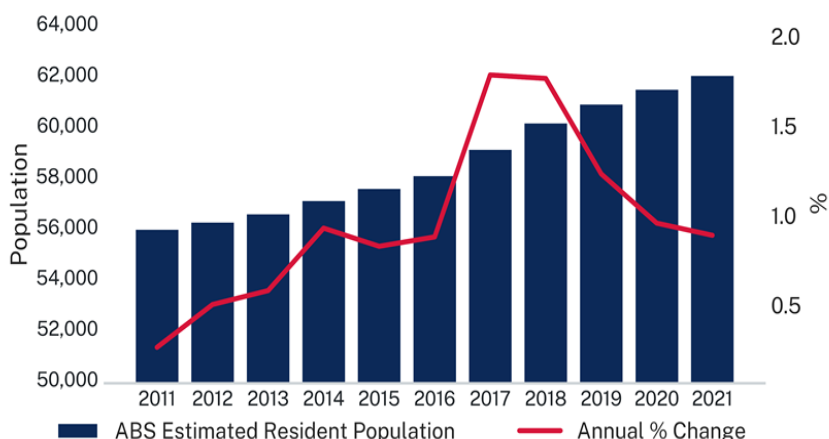


Figure 9: Central Orana FER population growth, 2011-2021 (ABS ERP, July 2022).

Demographic profile

The demographic composition of the Central Orana region population aligns relatively closely with the rest of NSW, as shown in Figure 10 below. However, the proportion of the population under 20 years old sits 2.8% higher than the NSW benchmark, with the largest difference in the 0-4 age bracket (1.2%).

This demographic presents an opportunity for the region in relation to long term skilled workforce development if strong local pathways from education through to employment can be established. However, a significant population of children also presents a challenge given the related demand for education and other services such as childcare. March 2022 analysis indicates that significant parts of both the Narromine and Dubbo LGAs do not have access to adequate childcare services.^[25] This may reduce capacity to attract and retain skilled workers with young families, as well as prevent those acting as primary carers from engaging in the workforce.

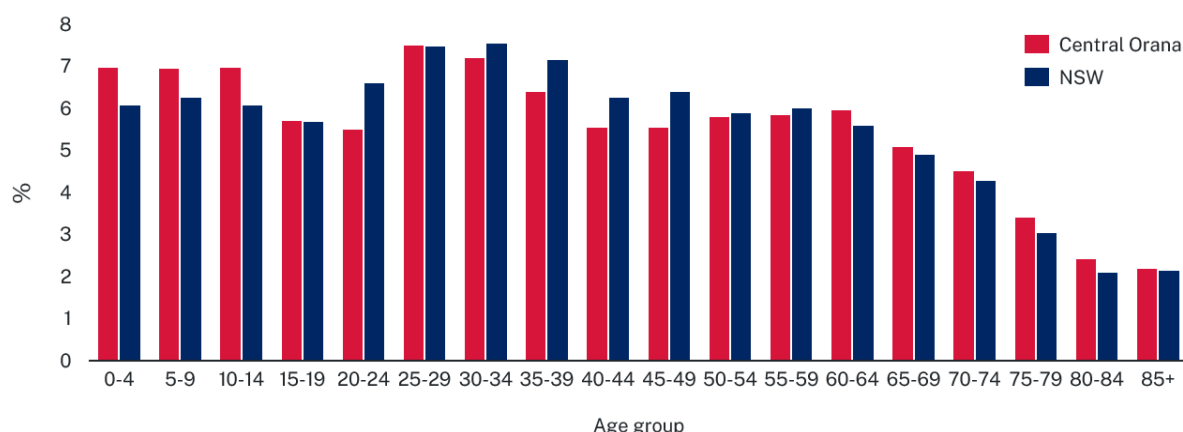


Figure 10: Central Orana FER population by age, 2021 (ABS ERP, July 2022).

The region’s housing market has tightened since 2018, but housing affordability remains a relative strength

The region has faced a decline in housing availability since 2018. This creates significant challenges, in particular given further increases in worker housing demand expected from planned major projects such as the Inland Rail project and the Central West-Orana REZ. Ensuring adequate and accessible housing supply will be critical in enabling the delivery and long-term success of these projects.

Housing availability

The Central Orana region has experienced housing availability challenges since 2018, with the market continuing to tighten significantly. Residential vacancy rates in the region dropped from a peak of 2.7% in April 2020 to a low of 0.3% in May 2021 (see Figure 11). Although availability has since risen to 1.5% as at August 2022, there is still significant pressure on housing availability across the region. During consultation, stakeholders reported that housing availability is constraining the growth capacity of local businesses, as attracting and retaining workers is contingent upon the availability of worker housing. This issue will likely be compounded as more workers are drawn to the region to support major project delivery in the coming years.

Housing affordability

Between June 2018 and June 2022, the median house price in the Dubbo LGA increased 32% from \$360,000 to \$475,000. In the Narromine LGA the median house price increased by 36% from \$220,000 to \$300,000.^[26] In July 2021, the house price to income ratio was estimated to be 4.87, lower than the NSW benchmark of 8.12.^[27]

While the significant price increases recorded have reduced affordability, the region’s key housing market issues appear to be largely related to availability rather than affordability challenges. The total number of residential building approvals has gradually increased in recent years, which may reflect expansion of the housing supply associated with new residential land releases in the region.

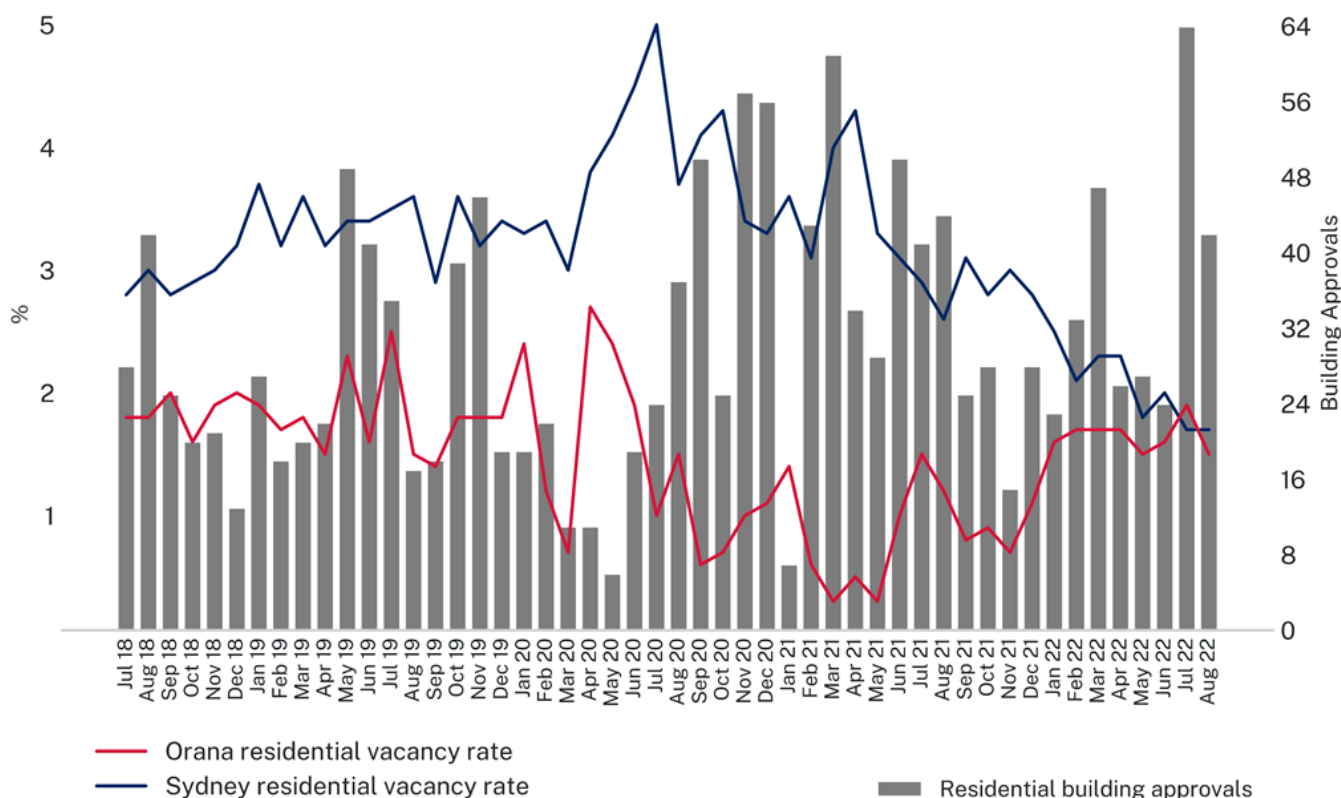


Figure 11: Central Orana FER vacancy rate and building approvals, 2018-2022 (REINSW, 2022).

Note: REINSW vacancy data collection is not aligned with the FER boundary map, resulting in an overlap with other FERs. These results are therefore intended to provide an indication of housing vacancies in the region

The unemployment rate in the Central Orana region has consistently remained below the NSW benchmark, while job vacancies have more than doubled since 2018

Job vacancies have more than doubled in the region since 2018 despite major shocks to industry, including natural disasters and the COVID-19 pandemic, while unemployment rates have converged to be close to the NSW average. The region recognised the importance of making the region an attractive place to live and work in the 2018 REDS, and this will need to remain a key priority.

Employment

As shown in Figure 12, unemployment rates in the Central Orana region have remained consistently below the NSW benchmark since 2016, but now have broadly converged to a rate close to the NSW benchmark. Unemployment in Dubbo LGA sat at 3.3% in June 2022, while Narramine LGA saw a slightly higher rate of 3.9%.

The unemployment rate across the region increased quickly between late 2020 and late 2021, likely to partially be a result of the COVID-19 pandemic and related restrictions. However, a significant improvement in the unemployment rate has been recorded since the peak in September 2021.

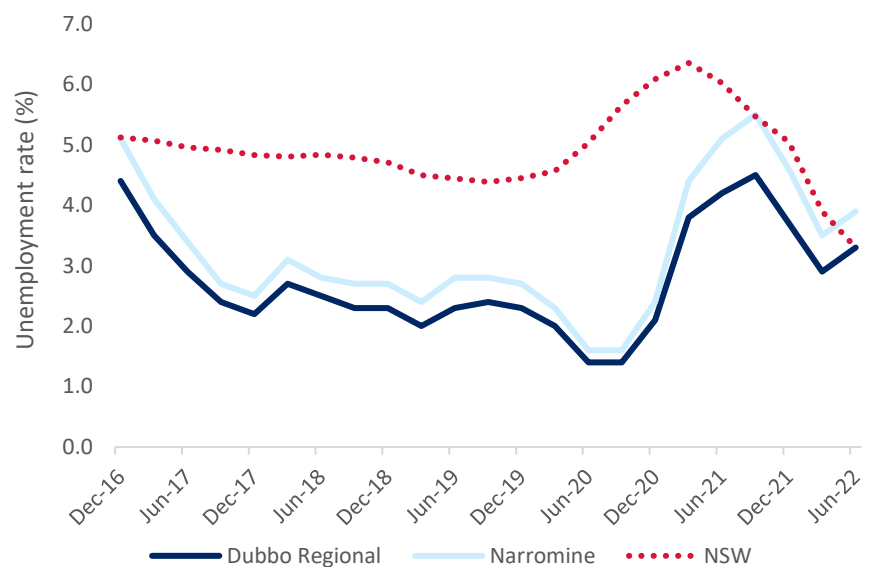


Figure 12: Central Orana FER unemployment rates (%), 2016-2022 (National Skills Commission, 2022; ABS Labour Force, 2022).

Meanwhile, since bottoming out in April 2020 at 589 vacancies, job vacancies in the broader Western NSW region have climbed to reach a peak of 1,819 in October 2021 (see Figure 13). Although vacancies have since recorded a slight moderation, they remain at a level more than double that in 2018, sitting at over 1,440 in August 2022. While the nature of vacancies is wide-ranging, the highest demand was in the health care and social assistance sector, with medical practitioners and nurses most in demand.



Figure 13: Job vacancies, Dubbo and Western NSW region (2018-2022) (Regional IVI, National Skills Commission, 2022).

Note: The regional IVI – National Skills Commission job vacancy data collection is not aligned with the FER boundary map, resulting in an overlap with other FERs. Job vacancy data only includes online job vacancies. These results are therefore intended to provide an indication of job vacancies in the region noting the limitations mentioned.

Aboriginal economic development

The Aboriginal unemployment rate in the Central Orana region has significantly improved over the past decade, decreasing from 19.8% in 2011 to 17.2% in 2016 and 9.5% in 2021. This rate is slightly lower than the Aboriginal unemployment rate for all of NSW of 9.8%, but remains above the NSW unemployment rate of 4.9%.

Aboriginal unemployment rate: Central Orana	2011	19.8%
	2016	17.2%
	2021	9.5%
NSW Aboriginal unemployment rate	2021	9.8%
NSW unemployment rate	2021	4.9%

Source: ABS Census 2021

While the outcomes outlined above represent a significant positive trend and improvement, an ongoing collaborative approach is needed to ensure further progress to help support economic prosperity for the Aboriginal community.

The positive outcomes achievable have been recently demonstrated by the Mindyarra Maintenance Centre project, which through considered project design has provided significant opportunities for skills, employment and business development for the Aboriginal community.^[28] With a number of major projects expected to be delivered in the near future, further opportunities will exist to ensure major investment can be successfully leveraged to support ongoing Aboriginal economic development in the region.

Opportunities also exist to explore potential development of cultural tourism experiences and products as part of the region's visitor economy offering. Offerings focused on acknowledging, valuing and embedding Aboriginal culture through unique cultural experiences could deliver significant opportunities for increased employment and Aboriginal business development.



Figure 14: Harvesting in Narromine LGA. Photo credit: Keiley Noble.

Central Orana region 2023 engine and emerging industries

The Central Orana region had a \$3.8 billion economy in 2020. Despite significant shocks since 2018, the region’s key engine industries have remained a key source of consistent growth. The relative strength of each industry is measured using location quotient (LQ) analysis¹ as displayed in Figure 15 below, where industry size correlates with bubble size.

Engine industries

The **agriculture sector** (LQ of 3.44) continues to support economic growth in the region despite significant shocks since 2018, adding \$250 million to GVA in 2020 and averaging growth of 6.3% per year between 2011 and 2020. Sheep, grains, beef and dairy cattle (LQ of 5.1) is the key specialisation that accounts for 76% of this value.

Energy and water supply (including renewable energy generation) can now be considered an engine industry in the region. With an LQ of 1.72, the sector recorded strong growth between 2011 and 2020, adding \$160 million to GVA in 2020. Sub-sector specialisations include gas supply (LQ of 9.0), water supply (2.0), and electricity distribution (1.8), which is set to grow due to the Central West-Orana REZ .

While the **manufacturing** industry overall does not represent a regional specialisation, the sub-sector of food manufacturing remains a strength, adding \$115 million to the local economy in 2020. Meat and meat product manufacturing accounted for \$63 million of this value.

Road transport continues to make a valuable contribution to the regional economy, adding \$73 million in 2020 and maintaining an LQ of 1.5. Similarly, the **tourism** industry remains a source of economic prosperity, with visitors to the region spending \$333 million in 2021 despite COVID-19 lockdowns.^[29]

The Central Orana region also demonstrates strength in its population-serving sectors, including **health and social assistance** (LQ of 1.41), **education and training** (LQ of 1.28), and **construction** (LQ of 1.23). Combined, these sectors added \$904 million to the regional economy in 2020.

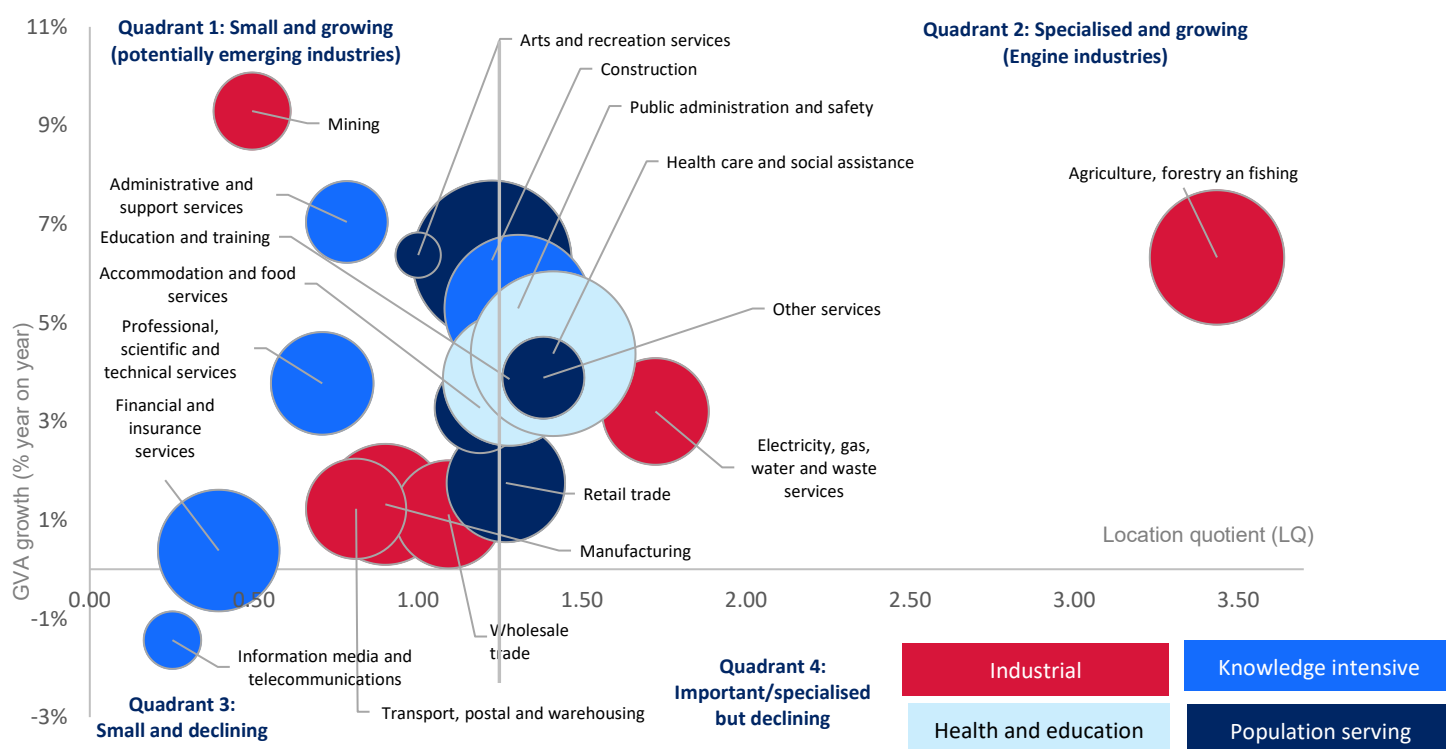


Figure 15: Location Quotient (LQ) Analysis by GVA, 2011-2020 (REMPLAN, 2020).

Note: While the 2018 REDS used employment data as the basis for LQ analysis, the 2023 Update has used Gross Value-Add (GVA) data. This allows for a clear demonstration of the changing economic impact of both engine and emerging industries across the regions.

¹ LQ analysis is used to measure industry specialisation by comparing the relative size of an industry in the region versus the whole of NSW.

Emerging industries

Mining has remained an emerging specialisation for the Central Orana region since 2018, demonstrating year-on-year growth of 9.3%, more than double the NSW benchmark of 4.1%. Non-ferrous metal ore mining accounted for 83% (\$70 million) of the sector’s total regional value in 2020. The region’s resource endowments and a continued need for these resources to meet demand in the construction sector (particularly in light of ongoing supply chain challenges) indicates further growth potential.

Non-metallic mineral mining also represents a growing strength for the Central Orana region, having added \$7 million to the local economy in 2020. The sector shows strong further growth potential in catering to the demand for critical minerals as part of the shift towards net zero.

An example of the potential in the region is the Australian Strategic Materials Dubbo Project, which will mine rare earths and critical minerals. The project has been supported by the NSW Government’s Critical Minerals and High-Tech Metals Activation Fund, with a \$10 million grant provided in December 2022 to support initial project enabling infrastructure works.^[30]

Beyond the mining industry, the region also shows emerging potential in the **arts and recreation sector**. The sector draws on endowments ranging from heritage activities to zoological and botanical gardens operations, with \$30 million GVA in 2020 and outpacing the state-wide average annual growth rate between 2011 and 2020 by 1.5% per annum. Beyond enhancing liveability and amenity for residents, supporting growth in this sector can also help diversify and grow the region’s visitor economy.

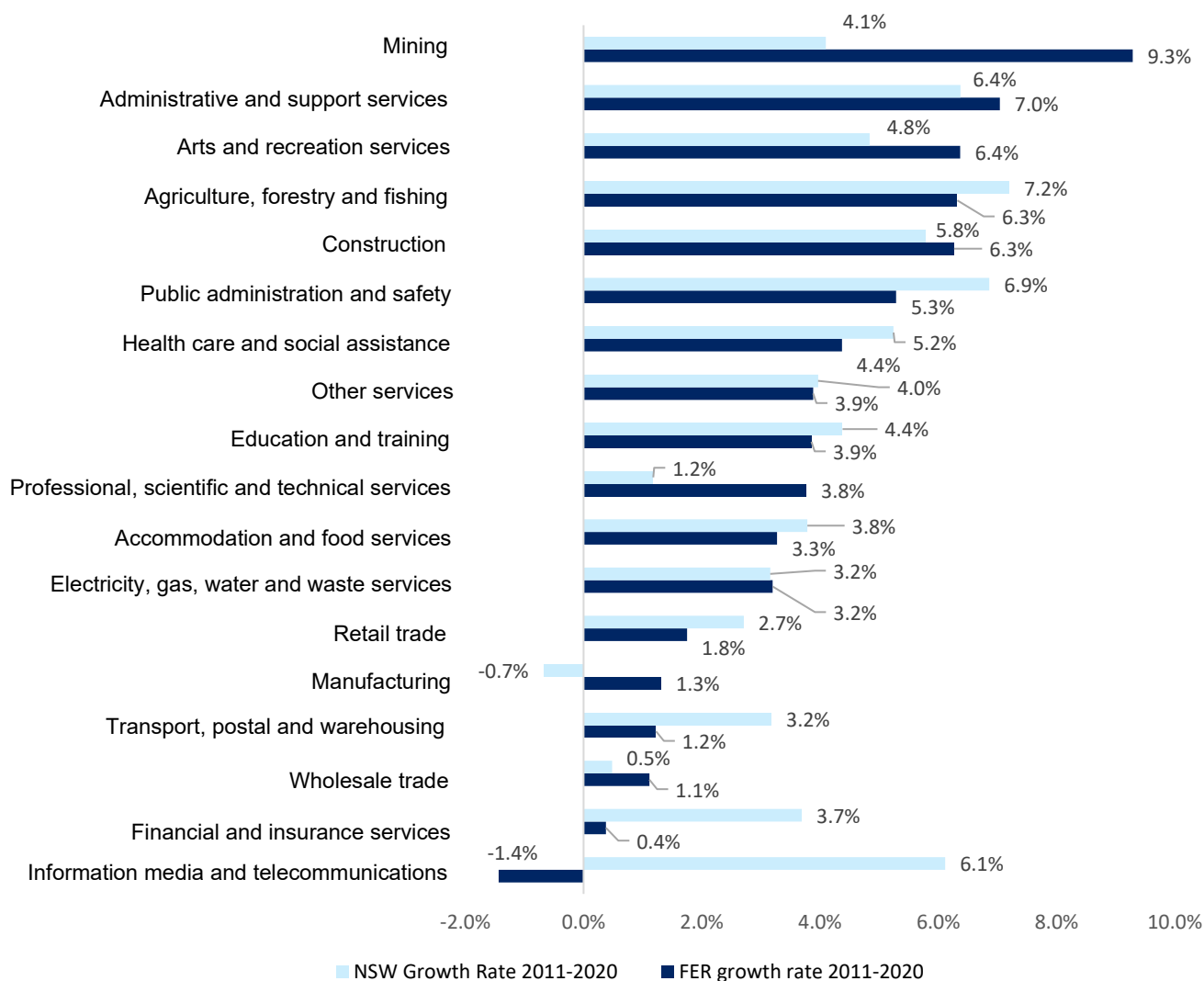


Figure 16: Change in Gross Value-Added by Industry (% YOY), 2011-2020 (REMPLAN, 2020).

Central Orana region 2023 endowments

Review of the 2018 endowments

The 2018 REDS identified a diverse range of endowments underpinning the Central Orana region's economy and regional competitiveness (see page 11 for the complete list from the 2018 REDS). Despite recent shocks impacting many key endowments, consultation affirmed most remain valid with key endowments including:

- Water – Macquarie River and Burrendong Dam
- Lachlan Orogen Resource Area
- Geographic location
- Arts and recreation Services
- Mining
- Human capital
- Physical infrastructure
- Local institutions

New endowments

While not yet reflected in the employment and industry specialisation (LQ) analysis, recent investments and policy efforts have led to the creation of new endowments which can underpin new economic opportunities and support future industry specialisations.

+ Central West-Orana REZ	The Central West-Orana REZ was the first zone of its kind to be declared in NSW, and is projected to support more than \$5 billion of new investment and over 3,900 jobs during construction. The REZ will be supported by the region's existing proximity to high-voltage transmission capacity. ^[31]
+ Health infrastructure and services	The \$306 million upgrade to Dubbo Hospital has enhanced the region's health care offering, while the presence of the University of Sydney School of Rural Health programs assists in providing training to develop a local skilled workforce for the sector.



Figure 17: View over Dubbo at sunset. Photo credit: Dubbo Regional Council.

8. Looking ahead: Strategic opportunities for growth, resilience and liveability

Opportunities and vulnerabilities in engine and emerging industries

Tourism

The Central Orana region has been able to leverage its significant natural endowments and highly specialised infrastructure to continue to grow the visitor economy, despite challenges associated with the COVID-19 pandemic.

Visitor spend (2021, \$m) ^[29]	333
Employment (2021) ^a	4,877
LQ score (2020) ^b	1.7
LQ Accommodation (2020)	1.7
LQ Food and beverage services (2020)	1.1

^a Summation of ANZSIC 1 digit retail trade, accommodation and food services, arts and recreation services.

^b LQ score is for the accommodation and food services industry.

Strengths

- The Central Orana region's geographic location places it in good proximity to Sydney, Melbourne, Brisbane and Adelaide, with a range of transport connections via road, rail and air.
- The region is home to natural attractions such as the Macquarie River and Wellington Caves, and a range of major tourism offerings including the Taronga Western Plains Zoo, Old Dubbo Gaol, Western Plains Cultural Centre and the Narromine Aviation Museum.

Vulnerabilities

- Externalities can significantly impact on the tourism industry's performance. This was demonstrated by the impact of COVID-19 restrictions, which reduced visitation by 33% and visitor spend by 31% between 2019 and 2020.^[29]
- A shortage of available housing in the region, an issue likely to be exacerbated by worker housing demands for major projects including Inland Rail and the Central West-Orana REZ, may impact the ability of the region to ensure sufficient supply of short-term accommodation for tourists.

Opportunities

- Stakeholders identified an opportunity to enhance collaboration between Narromine Shire Council and Dubbo Regional Council to further develop the Central Orana region as an integrated tourism destination.
- A strong agriculture sector in the region may present an opportunity for the region to diversify its visitor economy offering by supporting the establishment and growth of agritourism ventures.
- Opportunities exist to acknowledge, value, and embed Aboriginal culture through the potential development of cultural tourism offerings, which can increase land activation through unique, nature based cultural immersion experiences delivered on country and in the cultural arts space.

Energy and water supply

The Central Orana region has been able to leverage its significant natural endowments and highly specialised infrastructure to continue to grow specialisation centred around energy supply. The Central West-Orana REZ is expected to be the catalyst for substantial ongoing growth in the sector.

GVA (2020, \$m)	160
Employment (2021)	394
LQ score (2020)	1.72
LQ Electricity distribution (2020)	1.8
LQ Water supply (2020)	2.0

Strengths

- The Central Orana region benefits from existing connectivity to high-voltage transmission infrastructure, a strength which will serve the region well as its renewable energy generation and transmission sectors grow as a result of the Central West-Orana REZ. The electricity distribution sector added \$95 million to the economy in 2020.
- Water based endowments including the Burrendong Dam and Macquarie River support a water supply sub-sector specialisation that contributed \$45 million to the regional economy in 2020. These endowments are also critical to water security in the region, which is a key enabler of ongoing population and economic growth.
- The region has a number of major renewable energy facilities that recently commenced operating or about to commence construction, with around \$1.8 billion associated with Suntop Solar Farm (commenced operating in 2022), Wellington North Solar Farm, Maryvale Solar Farm and Uungula Wind Farm (all have planning approval with construction expected to commence in the near future).

Vulnerabilities

- With the expansion of the Central West-Orana REZ boosting demand for large-scale rural land for energy generation and distribution projects, increasing competition for zoned industrial and agricultural land may place upward pressure on land values.
- While the economic opportunities associated with the Central West-Orana REZ are significant, major project delivery in coming years will likely increase the existing challenges being faced by the region associated with housing supply and ensuring that workforce skills needs can be met.

Opportunities

- The Central West-Orana REZ is projected to support more than \$5 billion of new investment in the broader region and more than 3,900 jobs (during construction), which can support substantial future growth in the sector.^[31]
- A significant pipeline of future major renewable projects in the REZ is already forming, with no less than 9 major renewable energy projects currently at various stages of the planning approval process, with an estimated combined capital cost of over \$2.5 billion.
- Continuing to invest to grow the region's renewable energy supply and enhance water security will have flow-on benefits for other industries, as energy and water security are critical enablers of growth. Major project delivery also supports growth in key enabling sectors such as construction.

Agriculture

The region's long held strength in the agriculture sectors present significant opportunities for further growth, leveraging off the region's well established transport links and specialised value-add manufacturing capability.

GVA (2020, \$m)	253
Employment (2021)	1,819
LQ score (2020)	3.44
LQ Sheep, grain beef and dairy (2020)	5.1
LQ Agriculture support services (2020)	5.6

Strengths

- The agriculture sector has long been a specialisation for the region, and annual GVA growth of 6.3% over the past decade demonstrates its continued strength.
- Productive agricultural lands and well-developed access to key transport routes create a strong competitive advantage for the Central Orana region.
- The sheep, grains, beef and dairy cattle sub-sector accounts for around 76% of the region's total value-add from agriculture, amounting to \$190 million in 2020.

Vulnerabilities

- The industry relies on viable climatic conditions for production, which as highlighted by recent natural disasters are being impacted by increased climate variability associated with climate change.
- The availability of sufficient land to support production and growth in the agriculture sector may be impacted by competition from competing land uses including expansion of residential land supply, demand for industry zoned land, and demand for significant tracts of land to support the Central-West Orana REZ.
- Macroeconomic factors beyond the control of producers such as input costs, supply chains and commodity prices can significantly impact on the value of outputs.

Opportunities

- Supporting increased uptake of agtech in farming processes can help facilitate more efficient and productive farming approaches, but is reliant on the presence of reliable digital connectivity.
- Facilitating greater collaboration with local value-add manufacturing can enhance the value yielded from local agriculture outputs, in particular for meat, grain and cereal products where significant manufacturing capacity already exists in the region.
- There may be opportunities to expand agritourism in the Central Orana, which can assist in diversifying income streams for primary producers and help to further broaden the region's visitor economy offering.

Manufacturing (food products)

A focus on developing stronger links to the agriculture sector can help ensure the regional strength in food product manufacturing can continue to make a significant contribution to the Central Orana region's economy.

GVA (2020, \$m)	115
Employment (2021)	1,384
LQ score (2020)	2.8
LQ Meat and meat products (2020)	5.0
LQ Grain and cereal (2020)	2.1

Strengths

- While the manufacturing industry overall is not a regional specialisation, the sub-sector of food manufacturing represents a key strength, adding \$115 million to the local economy in 2020.
- The food manufacturing sector employs 823 people in the Central Orana region, creating significant value-add for its agriculture specialisation. Manufacturing associated with meat, grain and cereal products are key specialisations.
- Direct access to significant produce sourced from the region's productive agricultural land, alongside access to key transport routes creates a strong competitive advantage for the sector.

Vulnerabilities

- The food manufacturing specialisation relies upon inputs from the agriculture sector, hence disruptions to supply chains as a result of environmental or socioeconomic externalities can be detrimental to industry productivity.
- Increasing competition for industrial land due to major projects like the Central West-Orana REZ and Inland Rail (and accompanying logistics operations) may present a challenge to new or expanding manufacturing businesses.

Opportunities

- Investigating advanced manufacturing and tech-enabled opportunities for upgraded and/or new facilities may assist the sector in achieving greater efficiencies that can enhance productivity and increase sector output.
- Building and formalising synergies with local agricultural producers, as well as collaborating with local education infrastructure to enhance skills training can build a more integrated, localised, and resilient sector.
- Ongoing investment in further physical rail, road and air connections between the region and key markets can support continued competitiveness of the sector and help sustain future growth.

Road transport

Road transport represents both a key strength for the region given significant employment and growing value add to the economy, and an enabler of key export focused industries such as food manufacturing and agriculture.

GVA (2020, \$m)	73
Employment (2021)	1,053
LQ score (2020)	1.5

Strengths

- The road transport industry continues to make a valuable contribution to the Central Orana region economy, adding \$73 million in GVA in 2020 with an LQ score of 1.5.
- The Central Orana region has direct access to a number of major highways including the Mitchell, Golden and Newell highways, which supports the role of the sector as a key enabling service for getting output efficiently to market from key industries such as agriculture and food manufacturing.

Vulnerabilities

- Given the road transport sector is a significant contributor to NSW greenhouse gas emissions, the shift towards net zero will represent a key challenge for the sector that will require significant investment to be made.

Opportunities

- Investment into road infrastructure improvements, such as the Mitchell Highway upgrades between Dubbo and Narromine currently underway, and the new Dubbo bridge will enhance freight linkages in the region and support growth in road transport.
- Enhancing intermodal connections to rail freight infrastructure, including exploring options to leverage the new opportunities associated with the Inland Rail project can also help facilitate further growth in the road transport sector.



Figure 18: The Big Red Party Bus in Dubbo. Photo credit: Dubbo Regional Council.

Key themes in stakeholder consultation

Stakeholders from the Central Orana region noted both major opportunities and challenges related to population growth and major investments in the region.

Housing availability

Stakeholders expressed concern that current shortages of housing stock in the region will only worsen in the face of a growing population and a need to house a significant number of workers associated with major project delivery in the region.

Taking a long-term view on major projects

While recognising the significant economic opportunities provided by investments in major infrastructure and precinct based developments in the region, stakeholders expressed a keen desire to focus on the delivery of long-term benefits to the community, so to ensure these major investments do not lead to a boom-bust sequence of events.

Supporting liveability and amenity

Stakeholders noted the importance of ongoing investment into social and community infrastructure and key population serving services (such as education and health), so to facilitate a high degree of liveability. Improving amenity for existing residents and supporting efforts to attract and retain skilled workers represent key priorities in the region.

The need to continue to invest in key enabling infrastructure

Stakeholders also highlighted the need for ongoing investment into developing and maintaining high quality transport infrastructure links and infrastructure, and enhancing telecommunications infrastructure to improve digital connectivity as being critical for supporting both liveability and amenity, and also enabling future growth in key industries.

Updated 2023 REDS Strategies

The 2018 strategies remain relevant to the Central Orana region. However, stakeholders highlighted some refinements that would help the strategies better guide economic development and investment. Changes have been made to:

- refocus the agriculture strategy towards building capability in both agriculture and related value add activities,
- acknowledge the importance of the visitor economy as a whole, rather than just the tourism element,
- shift focus from development of logistics capabilities towards growing the Central Orana region as an innovative and connected business destination, and
- add an additional strategy focused on growing the region's workforce and enhancing liveability.

Reflecting the changes outlined above, the 2023 REDS Update strategies for the Central Orana region are listed below (amendments made to existing 2018 strategies are highlighted in **bold**):

Amended	Continue to grow the Central Orana region's capabilities in agriculture and associated value-add activities.
Amended	Establish the Central Orana region as an innovative and connected business destination.
Existing	Capitalise on the growth potential of the mining and construction sectors to boost related clusters in energy, manufacturing, and transportation.

Amended	Develop a mature and diversified visitor economy .
New	Grow the region's workforce through developing local skills capacity and enhancing liveability to support workforce attraction and retention.

Key enablers of economic growth

A number of key enablers have been identified to assist with delivering each of the strategies. This list is non-exhaustive, with a focus on identifying priority short-to medium-term enablers. Responsibility for implementation of these enablers sits with various levels of government, and in some cases may also include business, industry or non-government bodies. Collaboration across these entities at a local level will be key to achieving results.

Strategy	New Enablers		Lead and support	Rationale
Continue to grow the Central Orana region's capabilities in agriculture and associated value-add activities.	People and skills	Facilitate formal partnerships and collaboration between local manufacturing, agricultural and other key industries to enable climate resilient and value-added manufacturing products.	Department of Regional NSW (DRNSW) , DPI, local business chambers, NSW Farmers, Local Land Services	The region's food manufacturing specialisation provides an opportunity for leveraging greater value from agricultural outputs.
Establish the Central Orana region as an innovative and connected business destination.	Infrastructure and land use	Maintain investment in freight and logistics precincts and intermodal hubs, and work collaboratively to address road and rail freight barriers on key transport routes servicing the western catchment area.	Local councils , Transport for NSW (TfNSW), Department of Planning and Environment (DPE) - Planning, Industry	Investment to enhance roads and railways to support export specialisations create an ideal opportunity to maximise industry output value.
	Infrastructure	Support councils to use the Connectivity Index Tool following its 2023 release to identify priority locations for upgrades to telecommunications infrastructure to support business innovation and productivity.	NSW Telco Authority , local councils, DRNSW	Improved digital connections and enabling innovation across key industry sectors were highlighted as local priorities by stakeholders.

Strategy	New Enablers		Lead and support	Rationale
	Infrastructure	Support innovative actions and projects by Taronga Western Plains Zoo and local university campuses to support growth in STEM focused job opportunities.	Local councils, Training Services NSW, Office of Sport, Local Business Chambers, Destination NSW, Registered Training Organisations	The zoo and educational facilities are unique endowments for the region which can be leveraged to maximise scientific and economic value.
Capitalise on the growth potential of the mining and construction sectors to boost related clusters in energy, manufacturing, and transportation.	Government, regulation and information	Support further investigation into leveraging investment in the REZ to grow local supply chains to serve the needs of the community and the REZ, including through local manufacturing, critical minerals mining opportunities and value-add processing activities.	DRNSW, EnergyCo, Investment NSW, local councils	The region's renewable energy industry shows strong growth potential, which will change and grow demand for outputs of the manufacturing and mining sectors.
Develop a mature and diversified visitor economy.	Infrastructure	Invest in growing the sports and recreation infrastructure offering to develop the region as a hub for regional sporting events.	Office of Sport, local councils, Destination NSW, Local Business Chambers	Nature-based tourism is a key opportunity for growth identified in the Central West and Orana Regional Plan.
	Government, regulation and information	Explore opportunities to expand air connections between Dubbo and surrounding areas to target the attraction of overseas visitors and communities.	Local councils, Destination NSW, Local Business Chambers	Expanding air connections throughout Dubbo will assist with diversifying the visitor economy.

Strategy	New Enablers		Lead and support	Rationale
<p>Grow the region’s workforce through developing local skills capacity and enhancing liveability to support workforce attraction and retention.</p>	<p>People and skills</p>	<p>Support worker attraction and retention by collaborating with industry to identify worker attraction, skills, and training priorities (including those associated with skilled migration) for the region’s engine and emerging industries.</p>	<p>Training Services NSW, Chambers of Commerce, DPI, DRNSW, Regional Development Australia (RDA) Orana, TAFE NSW</p>	<p>Developing local workforce capacity will aid in reducing unemployment and enabling business growth.</p>
	<p>Infrastructure</p>	<p>Examine the current and projected housing supply needs through a Regional Housing Delivery Plan, including consideration of the impact of major projects and future growth pressures.</p>	<p>DRNSW, local councils</p>	<p>A housing supply issue in the region is constraining growth.</p>

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