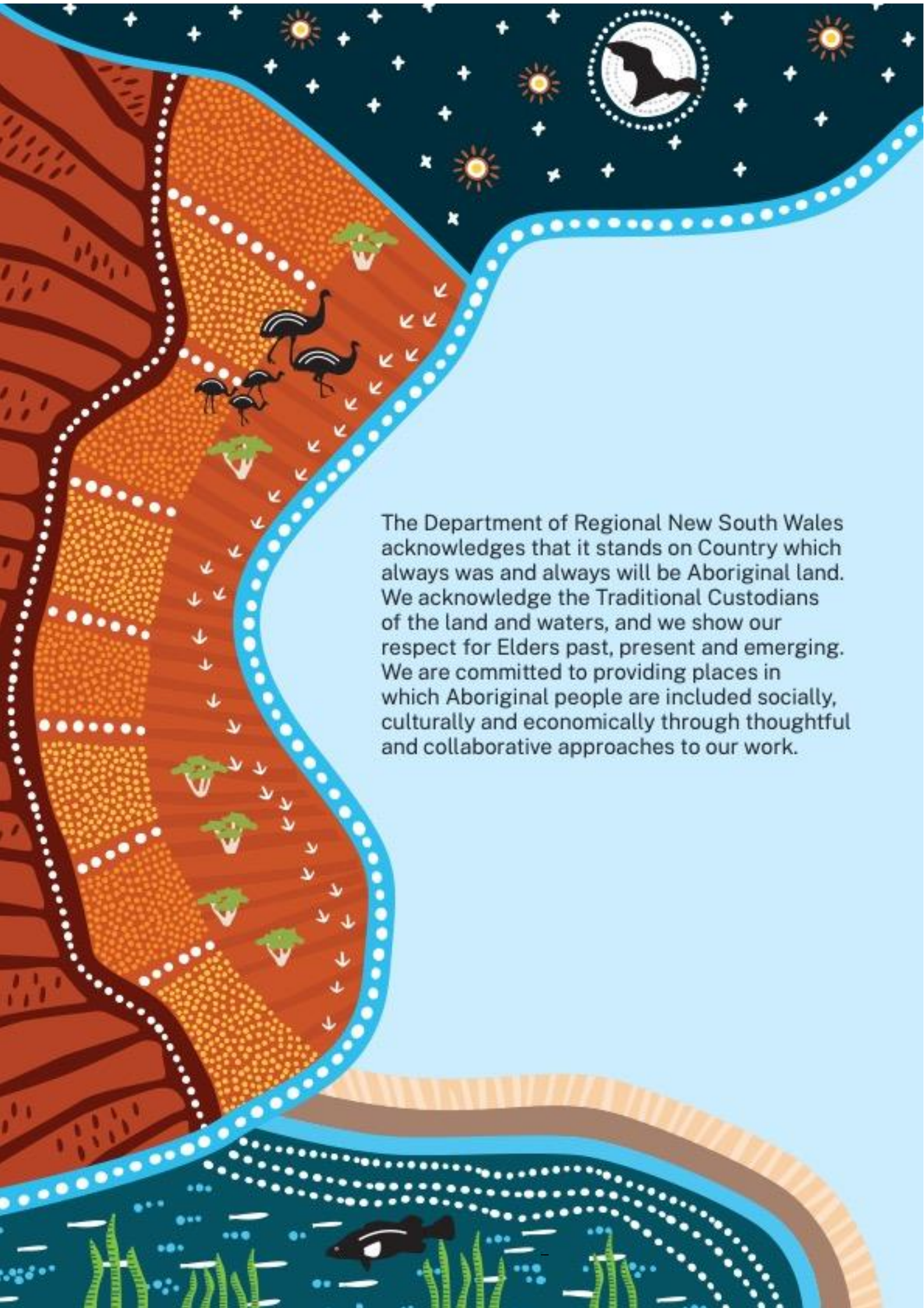


Northern New England High Country Regional Economic Development Strategy – 2023 Update





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 Northern New England High Country region to the development of the 2023 REDS Update, with particular thanks to staff from Glen Innes, Southern Downs and Tenterfield Councils. 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: Markets in Tenterfield. Photo credit: Tenterfield Shire Council

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1. Executive summary

Changes in the Northern New England High Country 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 Northern New England High Country region has seen significant investment delivered since 2018, with additional projects in the planning or delivery stages



\$8.7 million invested in the **New England Rail Trail**.



The **New England Renewable Energy Zone** is set to deliver 2,000 jobs across construction and operation.



\$15 million investment in upgrades to the Tenterfield to Newcastle Corridor.



\$25 million private investment in John Dee's Regional Cold Store Facility.

Since 2018, the region has experienced sustained population growth, house price increases and reduced vacancy rates, alongside a significant increase in job vacancies



1% population growth since 2018.



Housing vacancy rates sit **below 1%**, while median house prices have risen by an average of **76%** across Glen Innes Severn and Tenterfield Local Government Areas since 2018.



The proportion of the population over 55 years has increased by **1.4%** since 2018.



The **unemployment rates** in June 2022 in the region were between **7.3% and 9.8%**, despite regional job vacancies increasing to 1,456 in August 2022.

The region's key industries (including public administration, agriculture, tourism and energy) continue to remain resilient and deliver sustained growth



Tourism

+ 2.2% Year on Year (YoY) growth from 2011-2020

\$ 85 million visitor spend in 2021

3,849 jobs supported in 2021



Agriculture

+ 8.3% YoY growth from 2011-2020

\$ 168 million Gross Value Added (GVA) in 2020

3,087 jobs supported in 2021



Healthcare and social services

+ 3.7 % YoY growth from 2011-2020

\$ 66 million GVA in 2020

2,771 jobs supported in 2021



Transport, postal and warehousing

+ 1.9% YoY growth from 2011-2020

\$ 27 million GVA in 2020

1,003 jobs supported in 2021

Key themes from local consultation

Northern New England High Country stakeholders highlighted overcoming workforce constraints, leveraging major investments to achieve sustainable economic growth, and improving collaboration as key priorities for the region.

Maximising major project outcomes



Ensuring equitable benefits are received across the region from significant investments into the New England Renewable Energy Zone (REZ) was highlighted as a key priority.

Skills shortages



A shortage of skilled workers was highlighted as impacting the capability of businesses to operate and grow in the region.

Collaboration between all levels of government and the private sector



Significant recent investment and grant funding in the region has highlighted the need for collaboration across government and the private sector to ensure a coordinated response to asset maintenance and upkeep.

Reducing barriers to cross-border collaboration



Reducing barriers to cross-border collaboration and economic activity was identified as a crucial enabler of future growth, with a refresh of the Queensland-New South Wales Memorandum of Understanding highlighted as a key priority.

Northern New England High Country REDS - 2023 Update strategies and enablers

Strategies	Enablers
<p>Improve digital and physical connectivity as a foundation for growth.</p>	<ul style="list-style-type: none"> • Support local councils to use the Connectivity Index Tool following its 2023 release to review existing coverage and identify the areas of greatest need in the region for upgrades to telecommunications infrastructure.
<p>Support and grow key sectors through collaboration and investment in industry enabling infrastructure.</p>	<ul style="list-style-type: none"> • Support cross-border collaboration through a refresh of the Queensland-New South Wales Memorandum of Understanding (MoU). • Leverage the development of the neighbouring Namoi Regional Jobs Precinct (RJP) by engaging with local businesses to determine enabling infrastructure requirements. • Collaborate with industry to develop a workforce development strategy to reskill and upskill occupations in demand for the New England Renewable Energy Zone (REZ).
<p>Attract new businesses and residents to the region through enhancing liveability and investing in essential infrastructure and services.</p>	<ul style="list-style-type: none"> • Support investment in arts, recreation and tourism infrastructure to facilitate continued growth of this emerging specialisation, including community infrastructure which supports Aboriginal-led cultural tourism initiatives. • Determine current and future housing needs in the region through the Regional Housing Delivery Plan, particularly in areas surrounding the New England REZ which must account for increased worker housing demands. • Improve the user capability and operational ease of local council online development application tools.

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: Welcome to Tenterfield. Photo credit: Tenterfield Shire Council.



Figure 2: Washpool National Park. Photo credit: David Waugh.

3. About the Northern New England High Country region

The Northern New England High Country FER is located in the Northern Tablelands and border region of NSW and Queensland. It is comprised of the Tenterfield and Glen Innes Severn LGAs in NSW, and Southern Downs LGA in Queensland, as shown below in Figure 3. The main population centres are Glen Innes and Tenterfield in NSW, and Stanthorpe and Warwick in Queensland.

Total area covered (km ²)	19,911
Population (2021)	52,361
Glen Innes Severn	8,922
Tenterfield	6,798
Southern Downs (QLD)	36,641
Size of the economy (2020)	\$2.428 billion
NSW LGAs	\$0.779 billion
Southern Downs (QLD)	\$1.649 billion*
Total employment - NSW LGAs (2021)	5,620

*2019-20 estimated GVA value for Southern Downs LGA.

Source: ABS (2021) Estimated Resident Population, REMPLAN (2020), National Institute of Economic and Industry Research (2020), ABS Census (2021)

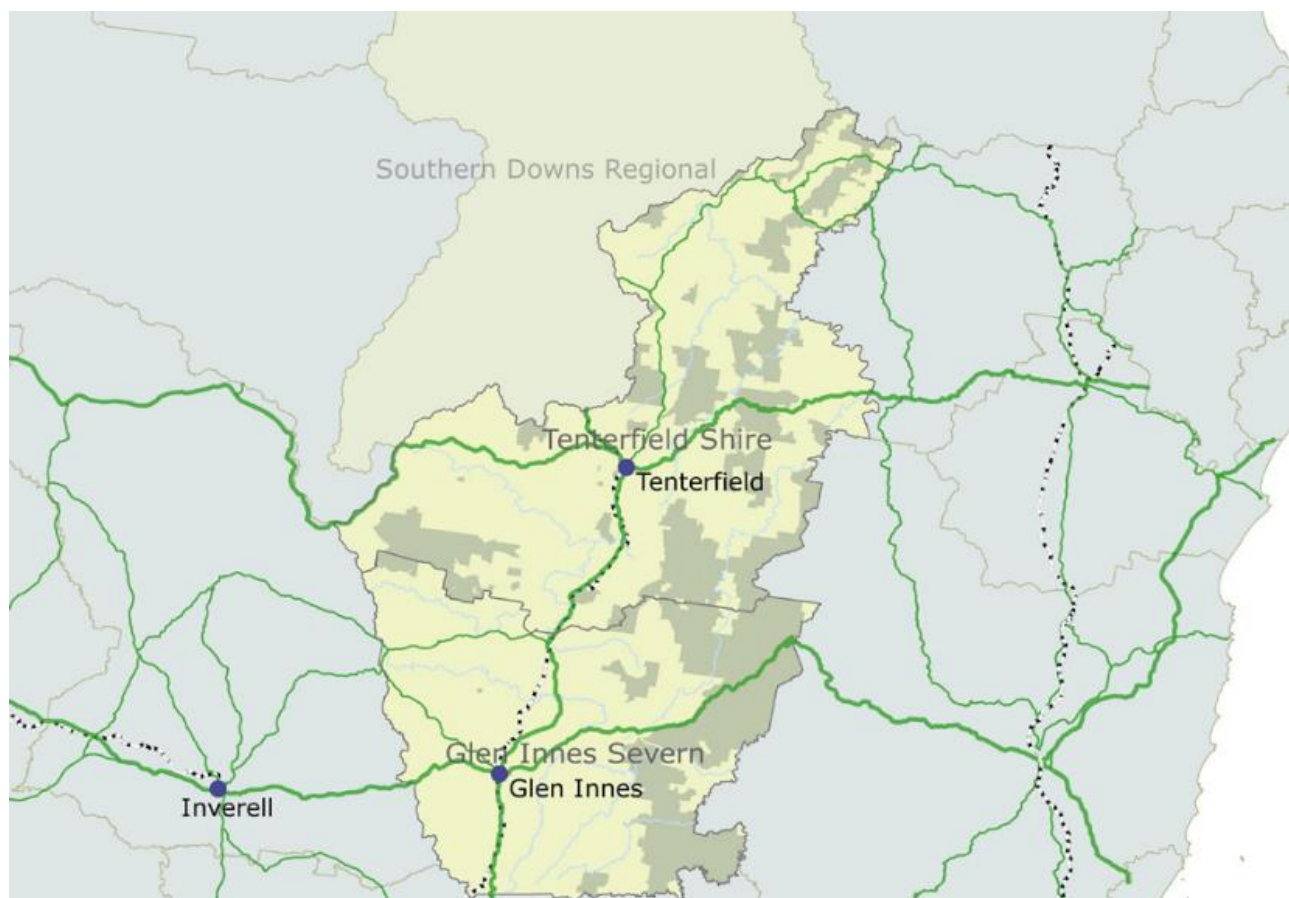






Figure 3: Northern New England High Country Functional Economic Region.

4. The 2018 Northern New England High Country REDS and 2020 Bushfire Addendum






In the 2018 Northern New England High Country REDS, the region was actively pursuing growth of its engine industry specialisations with this growth expected to drive growth in the region's population serving sectors. Endowments recognised in the document spanned natural, social and infrastructure assets, many of which were central to the approach to enabling economic development for the region.

2018 Northern New England High Country strategies

	Improve connectivity as a foundation for growth.
	Support and grow key sectors.
	Attract new businesses and residents to the region.
	In addition to the core strategies articulated in the Northern New England High Country REDS, the 2020 Northern New England High Country Bushfire Addendum set a series of additional short, medium, and long-term priorities focused upon overcoming direct and indirect damage from the bushfires, and pursuing growth and diversification opportunities which may improve the region's economic and community resilience.















2018 Northern New England High Country specialisations

The industry specialisations below were identified as comparative advantages for the Northern New England High Country region in the 2018 REDS based on employment concentrations.

	Agriculture and horticulture
	Tourism
	Food product manufacturing
	Aged care residential services
	Road freight transport

2018 Northern New England High Country endowments

The Northern New England High Country is home to a wide range of physical, institutional, built, and human endowments. These endowments play a key role in enabling success and growth across its 2018 industry specialisations of tourism, agriculture and horticulture, value-add food manufacturing, and residential care services.

Endowment	Relevant 2018 specialisation
Cool, temperate climate	
Reliable rainfall	
High sunlight intensity and consistent winds	
Clarence River, Border Rivers catchment and Mole River	
Leslie and Storm King Dam	
Largest, undeveloped, hard rock tin deposit in Australia	
Rare earth metal deposits	
New England Highway (access to Sydney and South East Queensland)	
Proximity to Brisbane, Gold Coast and the NSW Northern Rivers regions	
Proximity to Toowoomba and the Wellcamp Airport international freight hub	
Proximity to agricultural processing infrastructure in South East Queensland	
World Heritage areas	
National and state Parks, State Conservation Areas and Nature Reserves	
Glen Innes Airport	

5. The big picture: Shocks and trends impacting the Northern New England High Country region since 2018



Figure 4: Gibraltar Range National Park. Photo credit: David Waugh.

Significant events impacting major industries

A sustained period of drought, followed by major bushfires and flooding had severe environmental and economic implications for the region. The COVID-19 pandemic further challenged the region, with local businesses suffering from the impacts of movement and operating restrictions, particularly as a result of state border closures between NSW and Queensland. From the period 2018 to 2022, the region had 13 disaster declarations^[1] and received \$20.41 million in disaster recovery grants funding.

Drought

The region experienced prolonged drought between 2017 and 2020^[2], with it considered to be the worst ever drought recorded in some parts of the region.^[3] The impacts on the agricultural sector were substantial, with it estimated the drought led to summer crop planting areas dropping by 66% on normal levels by 2019.^[4] The flow-on impacts for the non-agriculture business sector were also significant, with 40% of businesses reporting a turnover decrease of at least 30 per cent.^[5]

The drought also created significant challenges for the region in relation to security of local water supply for industry and residents. In Glen Innes, Beardy Weir reached an all-time low of 3.5 metres below top water level in January 2020, resulting in water being unreachable using existing water supply infrastructure and Level 5 water restrictions introduced as a result.^[6] The issue of low supply volumes was exacerbated by quality issues in the Tenterfield Shire when combined drought and bushfire contamination impacted on water quality from Tenterfield Dam.^[7] Upgrades have since been made to address this issue including a new water treatment plant, reinforcements of dam walls and new bores to support improved water quality and supply.

Bushfires

In the 2019-2020 bushfires, 23% of the region was burnt causing temporary cessation of operations for local tourism providers, reduced opportunities for self-guided visitors, and the temporary closure of all National Parks in the region.^[8]

Infrastructure losses from the fires included stock fences, buildings, homes and tourism infrastructure (walking tracks, viewing platforms, and other park facilities).

Local Aboriginal and cultural heritage assets were also damaged, with serious repercussions for the cultural wellbeing of local Aboriginal groups.^[8]

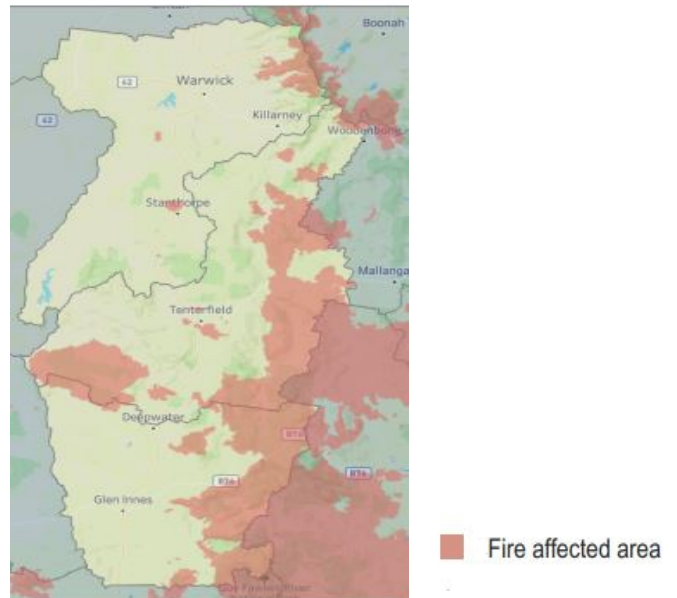


Figure 5: Fire impacted areas within the Northern New England High Country region.

COVID-19

The COVID-19 pandemic had serious repercussions for the Northern New England High Country economy and community. In March 2022, over one quarter of local businesses reported that COVID-19 was still negatively affecting their business.^[9] The pandemic also impacted the wellbeing of the local community, with JobSeeker recipients rising by 40% and Health Care Card recipients by 20% from March to June 2020.^[10]

As a tight-knit border community with strong economic and community ties between Northern NSW and South East Queensland, the negative impacts of state border closures were acutely felt by residents and businesses, a sentiment reflected during consultation.





Floods

The region has been impacted by a number of major storms and floods in recent years that have caused damage to property, business infrastructure and a range of public infrastructure. Significant damage occurred across the region in March 2021 after sustained rain and flooding, with key roads cut and significant damage across the region.^[11]

The region was also significantly impacted by the major floods in Northern NSW during March 2022, with an average value of \$70,000 for Rural Assistance Authority (RAA) Primary Producer Grants in the aftermath of 2022 flooding, significantly above the state average.^[12] The Glen Innes Severn region was also disaster declared as part of the September 2022 flood event, compounding the impacts from the March 2022 floods.^[1]

Macroeconomic trends shaping the region's future

Macro trends related to climate and migration have played a significant role in the development of the Northern New England High Country region since 2018 and are likely to continue to have a strong influence on its future. With labour shortages and uncertainty around future labour supply, shifting migration patterns and a central role in the progression Towards Net Zero, the region faces both opportunities and risks associated with these key emerging and established trends.

Trend	Opportunities and risks	
 <p>Digital transformation</p>	<p>The Northern New England High Country region has seen a greater presence of workers engaged in online remote work post the COVID-19 pandemic. Growing capabilities in knowledge intensive sectors may benefit from this shift if local business creation and growth in these sectors can be enabled.</p> <p>Digitisation has also had an impact on the region's largest industry sectors of agriculture and horticulture. Increased technology can be a key enabler of local growth, with industry trends demonstrating increased use of agtech can increase productivity, efficiency and output.^[13]</p>	<p>Remote workers may bring expectations of metro-equivalent infrastructure and services without contributing to the growth of local non-population serving businesses.</p> <p>Improving digital connectivity is critical to enabling increased agtech adoption.</p>
 <p>Changing migration patterns</p>	<p>The region's endowments make it an attractive location for those moving in search of high liveability and a regional lifestyle. The region is popular with retirees, however recent COVID-19 related migration has drawn a new cohort of metropolitan residents to the region. This reflects a state-wide population trend, with regional NSW gaining an additional 26,800 residents while Sydney declined by 5,200 from 2020-2021.^[14]</p> <p>Border closures during the pandemic also made movement between South East Queensland and the region more difficult, with those working in cross-border communities particularly impacted.</p>	<p>An increase in population has the ability to boost local economic activity and attract new businesses and industries to the region.</p> <p>Population increases can place pressure on existing infrastructure and services, for example housing and care economy services.</p>
 <p>Towards net zero</p>	<p>Areas of the region are included in the New England Renewable Energy Zone (REZ). The ability for the region to leverage its land and renewable energy natural endowments provides an opportunity to capitalise on this major investment.</p> <p>Given there are areas of the region which sit outside of the boundaries of the REZ, there is also a need to ensure benefits from development are shared across the region.</p>	<p>If appropriate high-voltage transmission infrastructure is not put in place, the region may not be able to maximise potential renewable energy generation investment opportunities in the New England REZ.^[15]</p>
 <p>Rising uncertainty</p>	<p>Climate-related natural disasters have become increasingly frequent, and these have potential to damage infrastructure and impede major project delivery timelines and feasibility.</p> <p>Increasing costs of inputs such as construction materials may also impede deliverability of these projects.^[16] Uncertainty around labour supply given workforce shortages and challenges can also act as a key constraint, as demonstrated by the significant growth in job vacancies in the region.</p>	<p>As the region begins development of the New England REZ, there is an opportunity to build resilience into project planning from the outset.</p>

6. Responding to change: Initiatives and investments since 2018



Figure 6: Bald Rock. Photo credit: Viewing Australia.

Since 2018, local councils, the NSW Government and other key organisations have delivered new and updated key 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
The NSW Government’s New England North West Regional Plan 2041 looks to capitalise on the region’s strengths in agriculture and green energy, among others, to overcome challenges such as an ageing population and climate change impacts.	
The Tenterfield and Glen Innes Severn Council’s Local Strategic Planning Statements and the Southern Downs Planning Scheme provide land use and community-based visions to guide future development in the region.	
The Glen Innes Severn Council Community Strategic Plan puts forward strategic objectives focused on a vision of building a prosperous, connected community that nurtures its people and places.	


<p>The Tenterfield Community Strategic Plan 2022-2032 puts forward a strategic view of the community’s goals for the next decade, to build on the unique local identity focused around quality nature, quality heritage and a quality lifestyle.</p>	
<p>In the Glen Innes Economic Development Strategy (2020-2040) & Action Plan (2020-2025), the Council puts forward a strategic plan based on growing a connected, engaged, prosperous, and welcoming community.</p>	
<p>The Southern Downs Economic Development Strategy 2022 – 2026 puts forward recommendations based on pursuing growth in agriculture and processing, tourism and events, industry and innovation and population attraction and retention.</p>	
<p>The Glen Innes Severn Council Workforce Attraction and Retention Strategy puts forward strategic recommendations around building local workforce capabilities and attracting a workforce from outside of the region, with the goal of addressing a high vacancy rate and building economic capacity.</p>	
<p>The Glen Innes and Tenterfield Drought Management Plans were produced in 2020 in response to periods of drought which saw local water supply levels fall to all-time lows (see page 12/13), with the goal of developing a more resilient, long-term water supply for the region.</p>	
<p>The Country and Outback NSW Destination Management Plan (DMP) 2022-2030 seeks to inspire and facilitate collaboration to grow a sustainable visitor economy across Country and Outback NSW.</p>	
<p>The Glen Innes Highlands Destination Management Plan builds a destination growth strategy around the pillars of customer experience, branding, enhancing existing visitor experiences, and delivering new experiences.</p>	
<p>The Border Rivers Regional Water Strategy sets out the long-term water plan for the region. It provides a shortlist of solutions that will safeguard existing water resources and enable the region to be in a stronger position to meet the challenges of a changing climate.</p>	
<p>The New England Road Network Strategy 2020 was commissioned by the New England Joint Organisation to determine key transport objectives, strategies and actions to support efficient road freight movement in the region.</p>	



Figure 7: Glen Innes Indoor Sports Centre. Photo credit: Glen Innes Severn Council.

Significant investments since 2018

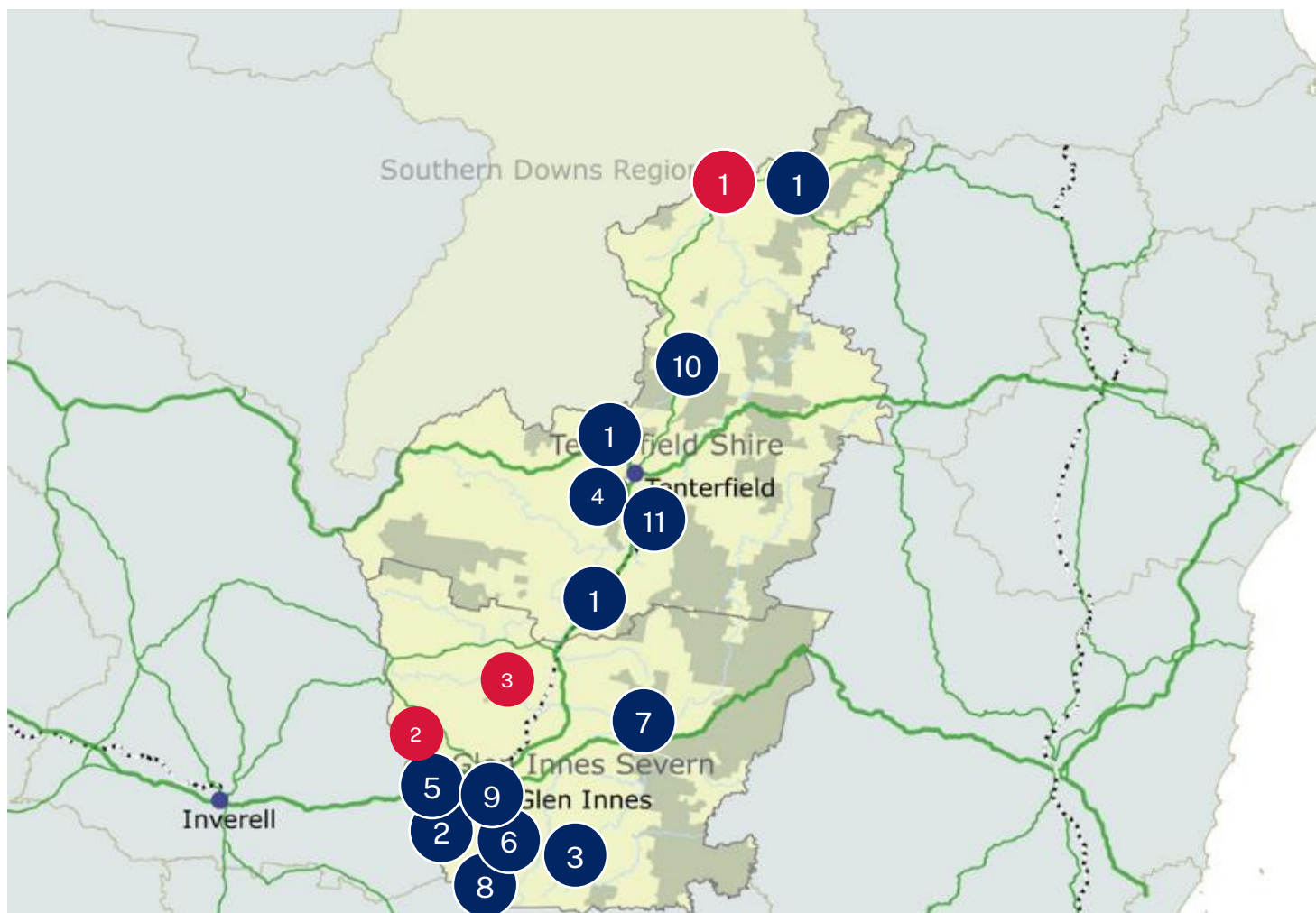


Figure 8: Investment in the Northern New England High Country region, as listed on pages 18 and 19

As shown in Figure 8 and detailed in the table below, since 2018 the region has seen significant local, state and federal funding, as well as private investment. These investments are at varying stages of progress, with some delivered, some underway, and some investments still in the planning stage. Public investments have largely focused on investments that support amenity for the local community, in particular new and upgraded recreation facilities, as well as upgrades to key transport links and infrastructure. Grant funding has played a key role in delivery of many of these projects.

Major private investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 John Dee’s Regional Cold Store facility*	\$25 million	↗
2 White Rock Wind Farm - Stage 2	\$300 million	↗ 🏠
3 Rangers Valley Feedlot expansion	\$20 million	↗

* This project was supported by a grant from the Commonwealth Government’s Building Better Regions Fund.

Major public investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 Road upgrades – Bolivia Hill, Bald Nob, Mt Lindesay, Sunnyside Platform	\$165.5 million	
2 New England Rail Trail	\$8.7 million	
3 New England Renewable Energy Zone	Expected to support investment of \$10.7 billion	
4 Tenterfield Mountain Bike Trails	\$4.2 million	
5 Centennial Parklands Skywalk	\$2 million	
6 Glenn Innes Indoor Sports Centre and precinct upgrades	\$6.3 million	
7 Gwydir Highway upgrades	\$10 million	
8 Glen Innes Highlands Business and Community Hub	\$0.6 million	
9 Glen Innes Hospital upgrade	\$50 million	
10 National Parks capital improvement and fire trail program	\$3.5 million	
11 Tenterfield Youth Precinct and mountain bike trailhead	\$1.75 million	

Regional grant programs

The region has received \$45.68 million of approved grant funding since 2018. Key programs in the region have included the Stronger Country Communities Fund, which saw \$10.59 million committed to projects including a playground, sports facility and the delivery of a youth focused wellbeing program.

Grant category	Approved funding
Community	\$15.81 million
Economic	\$9.46 million
Disaster recovery	\$20.41 million

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

7. Northern New England High Country 2023 economic snapshot

The region faces a challenge in maintaining a strong working base to support industry growth and deliver major projects

The region has seen population growth since 2018, with a slight uptick in the growth rate from 2019 likely the result of pandemic-related regional migration. However, a relatively high proportion of residents over 55-years may represent a challenge for the region in maintaining a productive workforce to support economic growth and delivery of major projects, such as the New England REZ.

Population growth

The region recorded an average annual population growth rate of 0.3% between 2018 and 2021 (as seen in Figure 9), with overall growth in the period sitting at 1%. In this period, a peak yearly growth rate of 0.51% was experienced in 2018.

Although this rate dipped slightly to 2019, a stabilisation and subsequent acceleration can likely be attributed in part to increased internal migration to the regions following the onset of the COVID-19 pandemic.

Overall, there was a net increase of 528 residents between 2018 and 2021, with the population growing from 51,833 to 52,147.

Demographic profile

As shown in Figure 10, in 2021 the proportion of the region's population over 55 was 13% higher than the NSW benchmark, representing a structural ageing challenge for the region.

A key challenge will be ensuring sufficient workforce training and skill development is available to allow the local workforce to match demand in key areas including health care, engineering trades and administration.

Achieving growth in the working age population will need to be a key priority to help overcome this challenge. Leveraging the increased availability of online education offerings brought about by the COVID-19 pandemic may bring about an opportunity for major employers to collaborate with providers to develop study and training programs which keep youth in the region for work. Investing in social infrastructure and related services can also aid in attracting and retaining young families to the region.

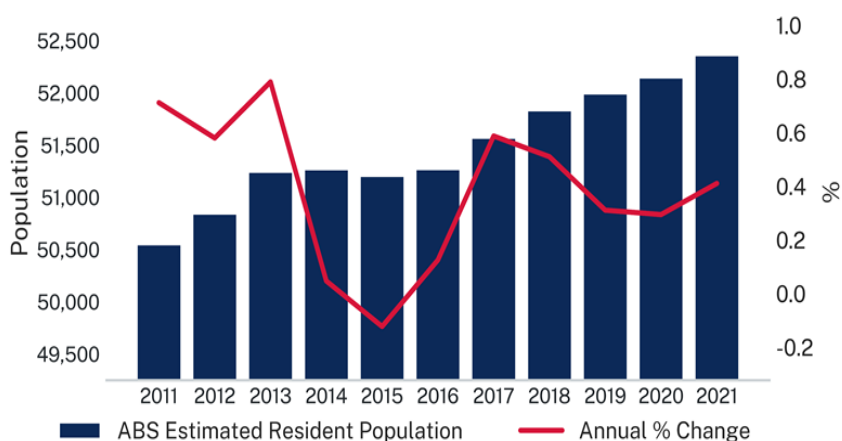


Figure 9: Northern New England High Country FER population growth, 2011-2021 (ABS ERP, July 2022).

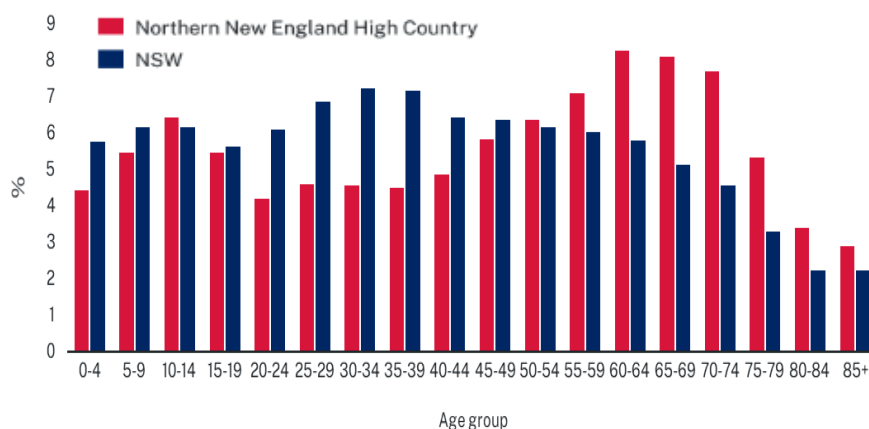


Figure 10: Northern New England High Country FER population by age, 2021 (ABS ERP, July 2022).

Enhancing housing supply in the region will be a key factor for enabling future growth

The region has faced a steep decline in housing availability and affordability since mid-2020, with high rates of internal migration to the regions due to the COVID-19 pandemic a likely factor.^[14] This is of particular concern given expected significant increases in worker housing demand brought about by planned major projects such as the New England REZ.

Housing availability

Residential vacancy rates in the region have dropped from 3.9% in June 2020 to 1.2% in August 2022 (see Figure 11), bottoming-out at 0.5% in November 2021. Meanwhile, outside of peaks in April 2020 and May 2021, residential building approvals in the region have remained relatively stable, with no evident increase in-line with increased demand for housing reflected by a very low vacancy rate.

Housing affordability

In the 4 years from June 2018 to June 2022, median house prices in Glen Innes Severn Council Area increased by 115% from \$170,000 to \$365,000. The Tenterfield LGA experienced a 38% rise in median house sales prices between June 2018 and June 2022, from \$265,000 to \$365,000.^[17] The Southern Downs LGA experienced a similar price rise of 28%, from \$267,000 to \$342,000 over the June 2018 to June 2022 period.^[18]

Sustained increases in house prices could constrain the ability of businesses in the region to attract and retain key workers, which can have implications for major project delivery, and also limit the ability of the region to successfully retain and attract younger people to live in the region.

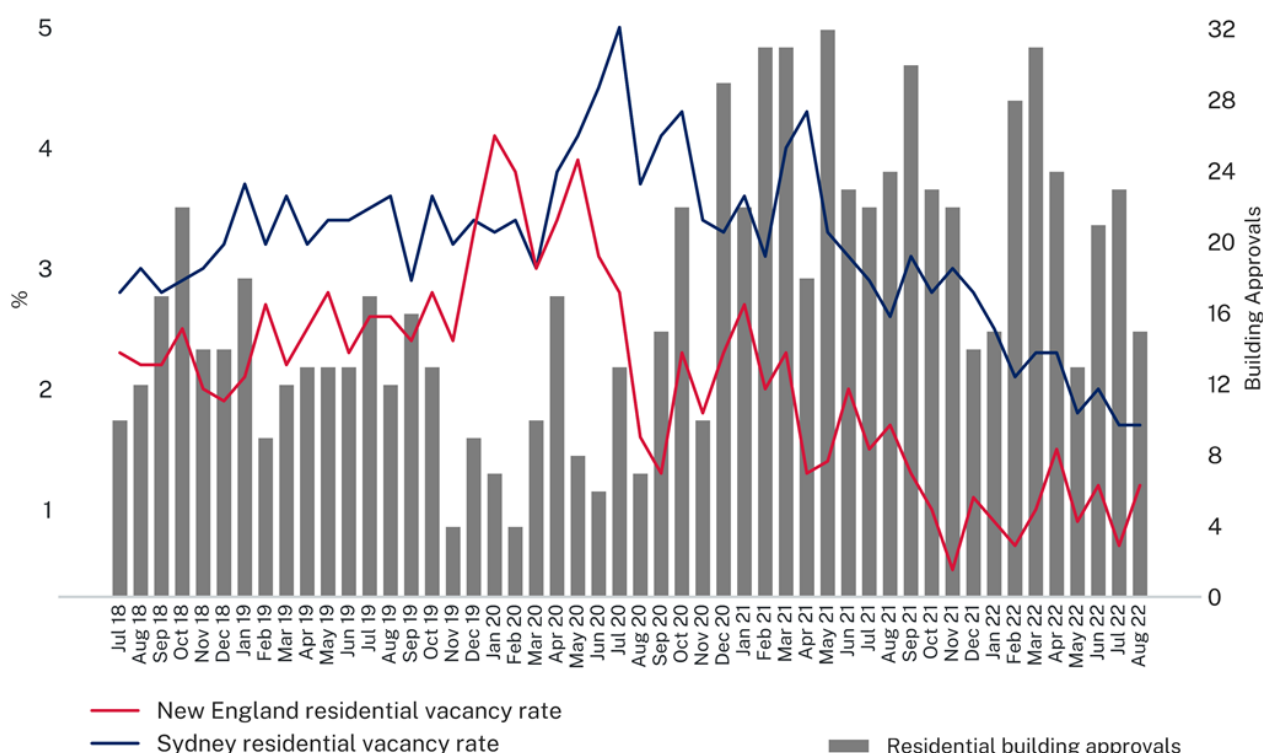


Figure 11: Northern New England High Country FER vacancy rate and building approvals, 2018-2022 (REINSW, 2022).

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.

Despite relatively high unemployment rates in the region, job vacancies have substantially increased since 2018

A constrained labour market has been a key issue since 2018, with job vacancies in the broader region doubling across this period despite major shocks to industry (see pages 12/13). The region identified a need to further develop skilled workforce attraction and retention initiatives in its 2018 REDS, and this will need to remain a key priority going forward.

Employment

As at June 2022, LGAs across the region had unemployment rates of between 7.3% and 9.8%, well above the NSW benchmark of 3.3% and Queensland benchmark of 4% (see Figure 12). Despite this, as shown in Figure 13 below, by August 2022 job vacancies in the broader New England and Northwest region had climbed to 1,456, rising from just 397 in May 2020. The combination of a relatively high unemployment rate and a rising vacancy rate may suggest a mismatch between local skills within the workforce cohort and available employment opportunities in the region.

Occupations with particularly acute need for workers include carers and aides (107), medical practitioners and nurses (75), automotive workers and engineers, and sale assistants (70). This indicates that while the skills shortage transcends any one industry, meeting labour force demands in dealing with an ageing population is likely to represent a major challenge for the region going forward.

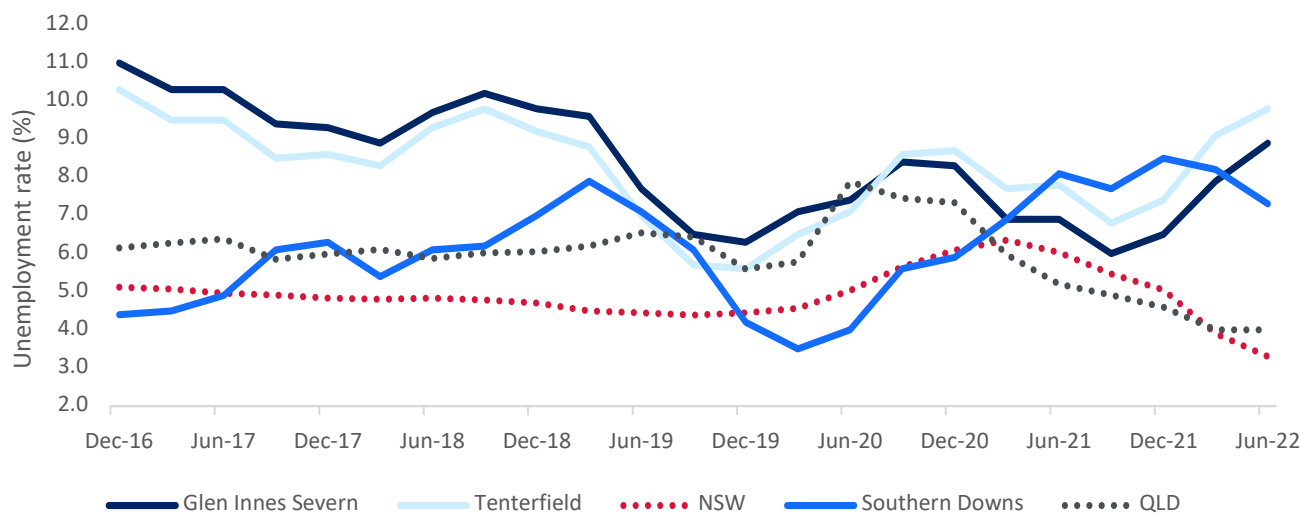


Figure 12: Northern New England High Country FER unemployment rates (%), 2016-2022 (National Skills Commission, 2022; ABS Labour Force, 2022).



Figure 13: Job vacancies, Tamworth and North West 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 aforementioned.

Aboriginal employment

In August 2021, Aboriginal unemployment in the Northern New England High Country region was 15.6%, which represented a significant improvement on the 21.5% rate estimated for 2016. However, this remains somewhat higher than the whole of NSW Aboriginal unemployment rate of 9.8%.

To help ensure this trend of improvement in Aboriginal employment outcomes can continue, an ongoing focus should be placed on continued engagement between all levels of government, Local Aboriginal Land Councils and businesses in the region to explore approaches to enhance support for Aboriginal economic development. A focus should also be placed on exploring potential business opportunities related to cultural tourism in the region.

Aboriginal unemployment rate: Northern New England High Country	2011	24.3%
	2016	21.5%
	2021	15.6%
NSW Aboriginal unemployment rate	2021	9.8%
NSW unemployment rate	2021	4.9%

Source: ABS Census 2021



Figure 14: Cycling in Tenterfield LGA. Photo credit: Tenterfield Shire Council.

Northern New England High Country region 2023 engine and emerging industries

The NSW LGAs of the Northern New England High Country have a combined \$779 million economy.¹ Despite major shocks since 2018, the region’s engine industries have continued to be a source of stability for the local economy. Enabling sectors such as public administration and safety and construction are also performing strongly, adding substantial value to the economy. Figure 15 displays the relative strength of each industry through Location Quotient (LQ) analysis², in which the size of the bubbles correlates to the size of the industry.

Engine industries

Agriculture is the region’s highest-value sector, contributing \$168 million GVA in 2020 with an LQ score of 11.1. Sheep, grains, beef and dairy cattle accounts for 79% of this value.

The **manufacturing** industry declined on average by 7.2% YOY between 2011 and 2020, and contributed \$14 million in GVA in 2020. However, regional strengths in agriculture and horticulture can support opportunities to grow emerging subsectors such as value-add food manufacturing, with recent investments such as the John Dee Cold Storage facility demonstrating the potential in this sector.

The **tourism** sector represents another important engine industry for the region, with an LQ score of 2.9. Visitors to the region are estimated to have spent \$85 million in 2021,^[19] despite challenges associated with the COVID-19 pandemic. NSW National Parks and Wildlife Service estimated that National Parks in the region contributed \$23 million in economic value and had over 300,000 visits in 2018.^[20]

Healthcare contributed \$66 million to the regional economy in 2020. The residential care services sub-sector, with a LQ score of 1.6, accounted for around 60% of this value.

Despite pandemic-related border closures impacting major transport routes in the region, the **transport, postal and warehousing** sector has continued to grow. Road transport accounting for 60% of the industry’s regional value add with an LQ score of 1.6.

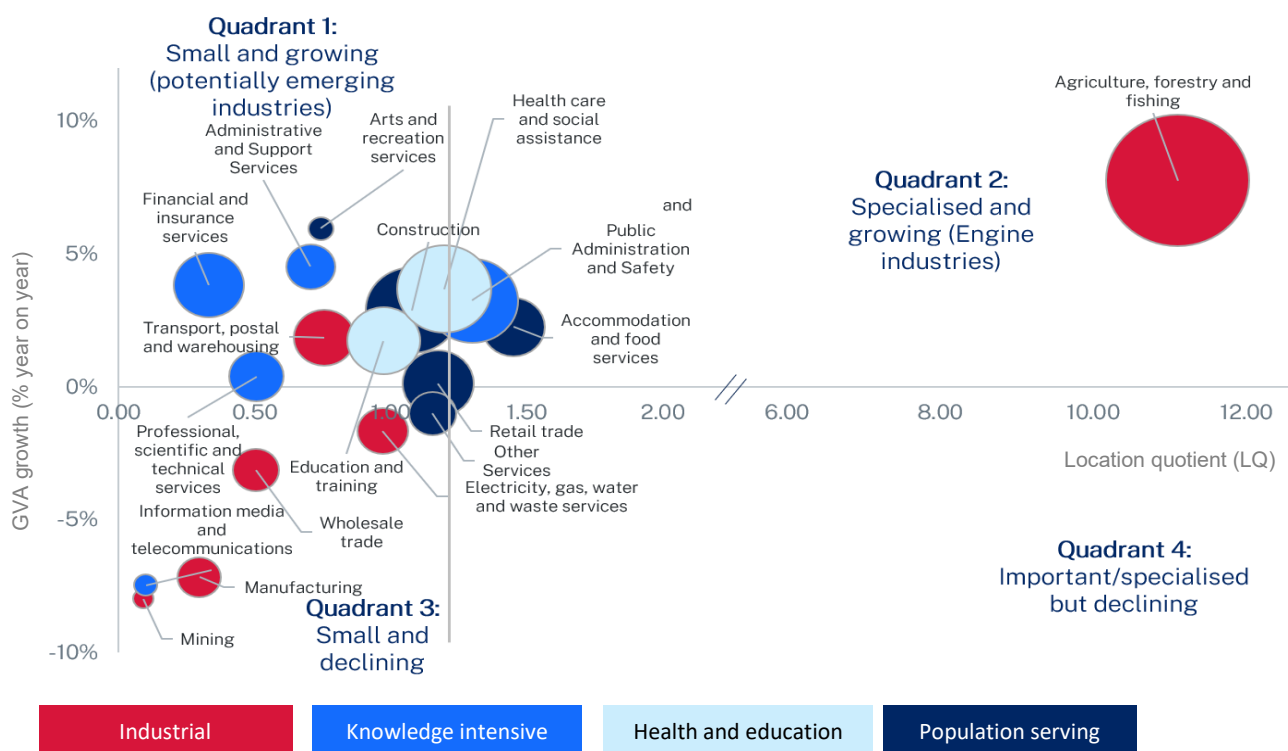


Figure 15 Location Quotient (LQ) Analysis by GVA, 2011-2020 (REMPPLAN, 2020)*.

*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. Analysis presented above is for the two NSW LGAs only.

¹ This value is for the two NSW local government areas only - the total GVA for the broader region including Southern Downs is estimated to be around \$2.4 billion.

² 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

The region's emerging specialisations have shifted since the 2018 REDS (see Figure 16). While the **arts and recreation services sector** remains an emerging specialisation and total value-add for the industry remains relatively low at \$5 million in 2020, average annual growth between 2011 and 2020 outpaced the NSW benchmark by 1.2%.

Knowledge-intensive industries are also emerging as potential future specialisations for the region, with **financial and insurance services** in particular outpacing the NSW growth rate and adding \$36 million to the regional economy in 2020, 86% of which came from the finance sector. Further growth may be enabled through leveraging opportunities to support local entrepreneurship and innovation drawing on increased remote working capability post-COVID and investments such as the Glen Innes Highlands Hub coworking, meeting and training facility.

While not yet reflected in the available data, **energy generation** is also likely to record significant growth in coming years, supported by significant investments related to the New England Renewable Energy Zone (REZ). The region's climatic conditions are highly suitable for renewable energy generation. Enhanced energy security is likely to have flow-on positive benefits for local manufacturing capability, which has experienced a decline over the past decade.

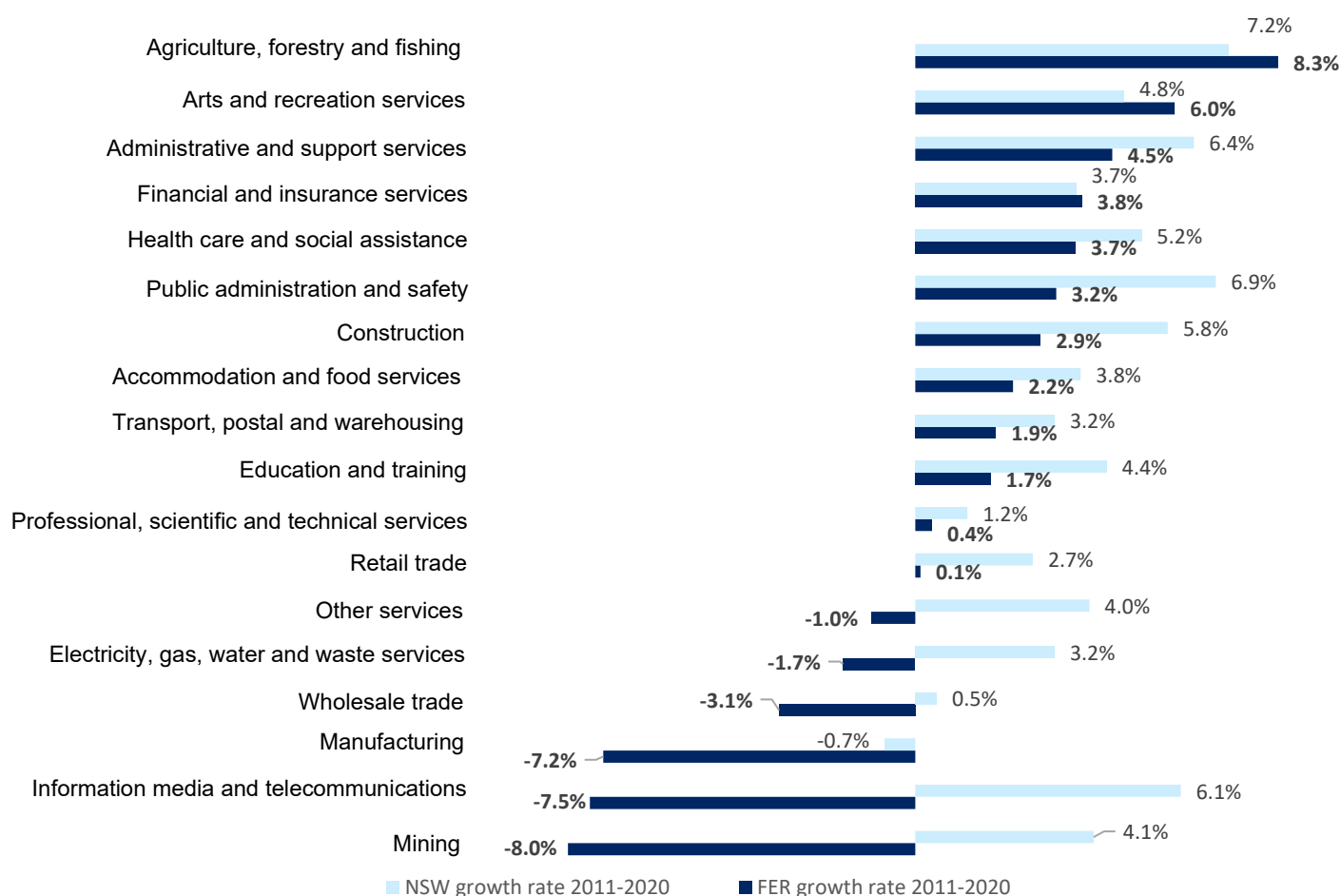


Figure 16: Change in GVA by Industry (% YOY), 2011-2020 (REMPLAN, 2020).

Northern New England High Country region 2023 endowments

Review of the 2018 endowments

The 2018 REDS identified a diverse range of endowments underpinning Northern New England High Country's economy and regional competitiveness (see page 11 for the complete 2018 list). Despite recent shocks impacting many key endowments, consultation affirmed that they broadly remain valid with key endowments including:

- Favourable climate for lifestyle and renewable energy generation
- Rivers, water catchments and dams
- Largest, undeveloped, hard rock tin deposit in Australia
- Road transport infrastructure supporting travel, freight and tourism
- Proximity to South East Queensland and Northern NSW visitor and relocation markets
- Glen Innes Airport
- World Heritage Areas, National and State Parks, State Conservation Areas and Nature Reserves.

New endowments

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

<p>+ New England Renewable Energy Zone (REZ)</p>	<p>The REZ is expected to bring \$10.7 billion in investment to the region, support over 2,000 jobs across construction and operation, and deliver 8 gigawatts in network capacity.^[15]</p>
<p>+ Gwydir Highway (addition to road transport infrastructure endowments)</p>	<p>The east-west connection is an important transport route for the region, and recent investment in its upgrade will further improve access and efficiency for road freight.</p>

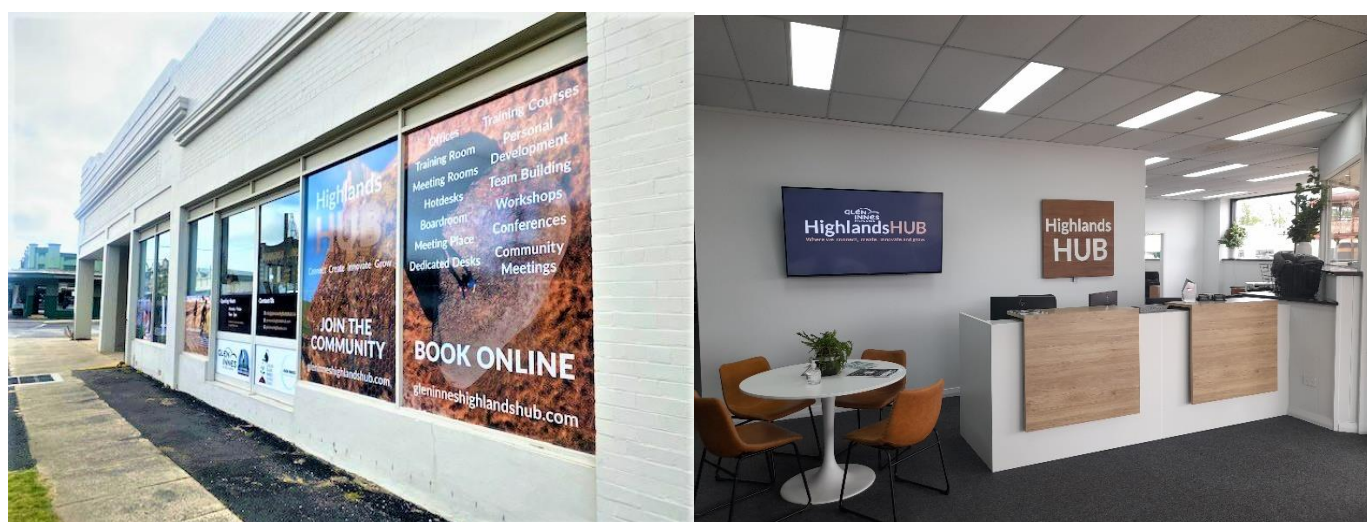


Figure 17: Glen Innes Highlands Hub Coworking, meeting and training facility. Photo credit: Glen Innes Severn Council.

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

Opportunities and vulnerabilities in engine and emerging industries

Agriculture and horticulture

The Northern New England High Country region has been able to leverage its significant natural endowments and agglomeration of primary producers to record continued significant growth in the agriculture and horticulture industries. However, climate change impacts and competing priorities from other sectors for land use may create challenges for these specialisations moving forward.

GVA (2020, \$m) ^a	168
Employment (2021)	3,087
Location Quotient (LQ) score (2020) ^a	11.1
LQ sheep, grains, beef and dairy (2020)	17.5
LQ poultry and livestock (2020)	5.7

^a Based on GVA and LQ for the agriculture, forestry and fishing sectors

Strengths

- The agricultural and horticultural sectors represent the largest value-add industry for the Northern New England High Country regional economy, accounting for 25% of total GVA for the region.
- Sub-sector specialisations are diverse and span sheep, grain, beef and dairy, agriculture support services, and poultry and other livestock.
- The region's climate and proximity to key consumer markets and export hubs represent advantages for the region in the industry.

Vulnerabilities

- The manufacturing sector in the region has seen significant decline in recent years. This inhibits the ability of primary producers to undertake value-add processing in the region.
- The New England REZ represents a significant economic opportunity for the broader region, but presents potential conflicts with primary producers in its demand for land for use for renewable energy projects.
- The region faces an ageing population and a shortage of skilled workers. This presents a challenge to current operators in securing the medium to long-term prospects of farming operations.

Opportunities

- The uptake of technology such as agtech in the agriculture and horticulture sectors is a key growth opportunity for the primary producers in enhancing process efficiency and output.
- Investing in high-quality digital connectivity throughout the region and addressing blackspots will be key to supporting increased uptake of technology in the agriculture and horticulture sectors.
- The industry will likely benefit from the declaration of the neighbouring Namoi Regional Job Precinct, given its focus on supporting the sustainable growth of intensive agriculture and livestock production.

Tourism

Tourism continues to be a key part of the Northern New England High Country region, despite the challenges associated with the COVID-19 pandemic and movement restrictions. A focus on diversifying the region's visitor economy by enhancing nature-based tourism offerings and exploring agritourism opportunities can support ongoing growth.

Visitor spend (2021, \$m) ^[19]	85
Employment (2021) ^a	3,849
LQ score (2020) ^b	1.45
LQ Accommodation (2020)	2.9
LQ Food Services (2020)	1.0

^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 region sits within the sixth most popular destination for domestic overnight visitors in regional NSW.^[21] The region encompasses a wealth of natural endowments which make for an ideal destination for visitors, including a temperate, four-season climate, numerous National and State Parks, conservation areas and World Heritage sites, as well as extensive river and waterway systems.
- Accompanied by close proximity to large populations in South East Queensland and the NSW Northern Rivers, the region is naturally well-positioned for ongoing growth in the visitor economy.

Vulnerabilities

- A reduction in the reliability and availability of air travel to the region impacts access from major markets such as Sydney.
- Increasing extreme weather events are likely to impact the region's natural endowments, which act as a key drawcard for visitation to the region.
- As at March 2022, the highest proportion of visitors to the region (31%) were travelling to visit friends or relatives. This group represents the lowest rates of expenditure as compared to holidaymakers or business travellers, representing a low value proposition for the region's visitor economy.^[15]

Opportunities

- The region demonstrates potential to leverage its considerable strengths in agriculture and horticulture to grow its agritourism sector. According to the Commonwealth Scientific and Industrial Research Organisation (CSIRO), demand for agritourism is expected to reach \$18.6 billion by 2030, with annual growth projected at around 5%.^[22]
- Geotourism, including cultural tourism, represents another growth opportunity for the region, with significant sites in the Washpool, Boonoo Boonoo, Bald Rock and Girraween National Parks (among others), and potential to link visitor experiences through trails connected to surrounding regions.
- Exploring cultural tourism opportunities in close collaboration with local Aboriginal communities, custodians of knowledge and Native Title holders will also support improved Aboriginal economy development and employment outcomes in the region.
- Promoting the natural beauty of the New England High Country, one of the Destination NSW 'hero' destinations, through continued infrastructure investment and tourism campaigns can help draw more visitors to the region.

Healthcare and social services

If challenges presented by workforce shortages and infrastructure resilience can be overcome, both the healthcare and social services industries demonstrate growth potential as a result of growing service demand and improving inter-regional connectivity.

GVA (2020, \$m)	66
Employment (2021)	2,771
LQ score (2020)	1.2
LQ residential care and social assistance services (2020)	1.6

Strengths

- The region's healthcare and social assistance industry is served by public hospital infrastructure in Glen Innes, Tenterfield and Stanthorpe, as well as many assisted living facilities across the region.
- Committed investment in expansion of this infrastructure, in particular the \$50 million Glen Innes Hospital upgrade will also bolster the industry.

Vulnerabilities

- An ageing population and the additional demand for health services this brings will present challenges for the region's health system, in particular in relation to specialised aged care services and residential care infrastructure.
- A shortage of skilled workers in the health sector will also act as a key constraint on growth, with low levels of housing availability impeding the ability of service providers to attract workers from outside of the region

Opportunities

- The region's emerging capability in education and training provides an opportunity for collaboration between local Registered Training Organisations (RTOs) and health service providers as a means of growing the sector's local skilled worker base.
- Initiatives already underway such as Glen Innes Severn Council's development of a Regional Learning System, as part of a Workforce Attraction and Retention Strategy can help support workforce capability development in the region.
- The provision of telehealth services was greatly expanded during the COVID-19 pandemic^[23], with those living in more rural areas benefiting from improved access to health services (provided adequate telecommunication infrastructure was in-place). Supporting the ongoing availability of these services can help support continued improvement of health outcomes for residents.

Transport, postal and warehousing

The transport industry demonstrates growth potential as a result of growing service demand and improving inter-regional connectivity.

GVA (2020, \$m)	27
Employment (2021)	1,003
LQ score (2020)	0.76
LQ road transport (2020)	1.6

Strengths

- Growth of the transport, postal and warehousing industry in the Northern New England High Country region between 2011 and 2020 was on average 1.9% per annum, despite border closures.
- Road transport in particular represents a key strength for the region, adding \$16 million to the local economy in 2020.
- The region's access to nationally significant freight routes and export hubs plays a critical role in the success of the sector.

Vulnerabilities

- The decline of the manufacturing industry in the region may impact on the industry, as exports from the region may become more focused on raw products.
- The sector is also vulnerable to externalities related to climate change, including supply chain issues brought about by reduced primary production outputs in times of drought or flooding, as well as transport infrastructure damage or network disruption caused by increasingly frequent natural disaster events.
- With freight volumes expected to double by 2030 and triple by 2050 ^[18], there will likely be additional pressure on regional road infrastructure.

Opportunities

- Investment in the efficiency and resilience of the region's road network will be a key enabler of increased productivity and output for the sector. A focus on key investments such as road widening and surface upgrades to increase accessibility for High Productivity Vehicles (HPVs) can support ongoing growth in the sector.
- Access to improved rail infrastructure to the west of the region presents opportunities for expansion of warehousing and last-mile transport capabilities.
- Given the strategic position of the Northern New England High Country region that includes a significant part of the NSW-QLD border area, the substantial growth in freight volumes expected in NSW may present opportunities for significant growth in the sector in coming years.^[24]

Key themes in stakeholder consultation

Stakeholders from the Northern New England High Country region noted the area is facing both challenges and opportunities related to the declaration of the New England REZ, and expressed a strong desire for increasing collaboration and alignment between government stakeholders in project delivery. Leveraging improved energy security as a result of the REZ and the associated substantial renewable energy projects was also seen as a key opportunity for the region.

A skilled labour shortage further exacerbated by limited availability of housing was noted by stakeholders as a significant growth constraint. Stakeholders also raised the resolution of long-standing cross-border issues as a key priority following the direct impacts of the COVID-19 border closures.

Maximising major project outcomes

Stakeholders noted that while the New England REZ is likely to bring about substantial public and private sector investment, there were shared concerns major projects could result in a 'boom-bust' period if planning and delivery approaches do not account for the long-term impacts on local communities and industries. A focus on ensuring long lasting benefits are delivered was highlighted as a key priority.

The need to protect primary production land in determining the location of transmission lines and renewable energy projects was also highlighted as an example of where careful planning and consideration is needed to balance competing needs and deliver sustainable economic development.

Skills shortages

Stakeholders reported that a consistent shortage of skilled workers was impacting the capability of businesses to operate and grow in the region. A lack of availability of local training courses was noted as limiting the region's capacity to develop this skills base locally, while low housing vacancy rates were highlighted as a key constraint in attracting workers from outside of the region.

Improving collaboration between all levels of government and the private sector

Local government stakeholders noted that the long-term costs of major investments, such as asset maintenance and upkeep, can present a significant financial burden. Stakeholders request improved collaboration across all levels of government to share responsibility for the long-term impacts of major infrastructure investments. Stakeholders noted major local employers should also be a part of this work, so as to increase business confidence and enable growth.

Reducing barriers to cross-border collaboration

Reducing barriers to cross-border collaboration and economic activity was identified as a key enabler of future growth, with a need to refresh the QLD-NSW Memorandum of Understanding being highlighted. Recent challenges brought about by COVID-19 pandemic related border closures that caused significant interruptions highlighted the need for a renewed focus on improving cross-border arrangements.

Northern New England High Country REDS – 2023 Update strategies

The 2018 strategies are considered to broadly remain relevant to Northern New England High Country region. However, during consultation it was noted the strategies would benefit from being more specific and targeted, so to catalyse action by relevant stakeholders. Therefore, changes have been made to:

- identify the key need for improvements in digital and physical connectivity as a key enabler for facilitating economic growth,
- highlight the need to support collaboration and investment in industry enabling infrastructure, as a key mechanism for supporting engine and emerging industries, and
- create a focus on enhancing liveability in the region through investment to improve essential infrastructure and services.

Reflecting the changes outlined above, the 2023 REDS Update strategies for the Northern New England High Country region are listed below (amendments made to 2018 strategies are highlighted in **bold**):

Amended	Improve digital and physical connectivity as a foundation for growth.
Amended	Support and grow key sectors through collaboration and investment in industry enabling infrastructure.
Amended	Attract new businesses and residents to the region through enhancing liveability and investing in essential infrastructure and services.

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
Improve digital and physical connectivity as a foundation for growth.	Infrastructure	Support local councils to use the Connectivity Index Tool following its 2023 release to review existing coverage and identify the areas of greatest need in the region for upgrades to telecommunications infrastructure.	NSW Telco Authority; Department of Regional NSW (DRNSW); local councils	Enhancing digital connectivity represents a critical factor in enabling business and industry growth.
Support and grow key sectors through collaboration and investment in industry enabling infrastructure.	Government, regulation and information	Support cross-border collaboration through a refresh of the Queensland-New South Wales Memorandum of Understanding (MoU).	Cross Border Commissioner; Local councils; NSW and QLD State Governments	COVID-19 border closures highlighted the importance of strengthening cross-border cooperation.
	Infrastructure	Leverage the development of the neighbouring Namoi Regional Jobs Precinct (RJP) by engaging with local businesses to determine enabling infrastructure requirements.	DRNSW; Local councils	Matching local workforce skills capacity with future needs will be a critical component of ensuring RJP success.

Strategy	New enablers		Lead and support	Rationale
	People and skills	Collaborate with industry to develop a workforce development strategy to reskill and upskill occupations in demand for the New England REZ.	Local councils; Training Services NSW; TAFE NSW; EnergyCo; Energy Providers; local business chambers	Maximising the local community benefit derived from large capital investment in the region.
Attract new businesses and residents to the region through enhancing liveability and investing in essential infrastructure and services.	Infrastructure	Support investment in arts, recreation and tourism infrastructure to facilitate continued growth of this emerging specialisation, including community infrastructure which supports Aboriginal-led cultural tourism initiatives.	Local councils; DRNSW; Create NSW; Regional Arts Development Organisations; Destination NSW; Destination Country and Outback; National Parks and Wildlife Service; Local Aboriginal Land Councils (LALCs)	A strong arts and recreation sector combined with local Aboriginal cultural endowments provide an opportunity for the region.
	Government, regulation and information	Determine current and future housing needs in the region through the Regional Housing Delivery Plan, particularly in areas surrounding the New England REZ which must account for increased worker housing demands.	DRNSW; Local councils; Department of Planning and Environment (DPE)	An existing shortfall in housing is likely to be exacerbated by future growth in demand and will constrain workforce attraction and retention.
	Government, regulation and information	Improve the user capability and operational ease of local council's online development application tool.	Local councils; DPE Planning	Improve operational efficiency of local planning systems.

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Figure 18: Resting on a walkway in Cathedral Rock National Park. Photo credit: Josh Smith.