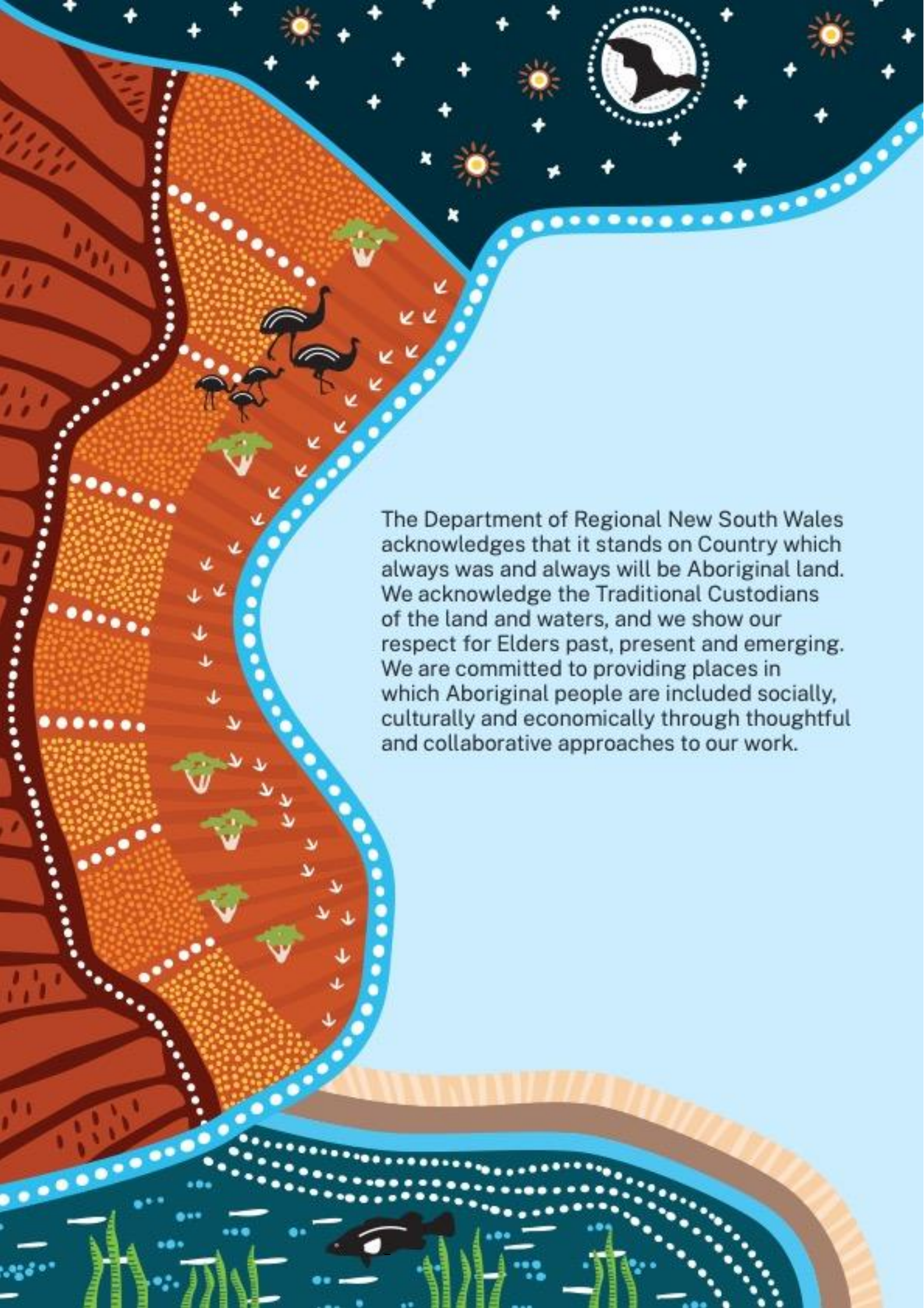


# Far West Regional Economic Development Strategy – 2023 Update





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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### **Acknowledgements**

The Department of Regional NSW would like to acknowledge the significant contribution of many stakeholders in the Far West region to the development of the 2023 REDS Update, with particular thanks to staff from Broken Hill and Central Darling 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: Outback astronomy in Broken Hill. Photo credit: Visit NSW.

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# 1. Executive summary

## Changes in the Far West 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 Far West region has seen significant investment delivered since 2018, with additional projects in the planning or delivery stages



**\$41 million** committed to the **Broken Hill Battery Energy Storage System**.



Sealing of the **Silver City Highway, Cobb Highway** and **Pooncarie Road**.



**\$500 million** invested in the **Wentworth to Broken Hill Pipeline**.



Over **\$650 million** committed to deliver the **Hydrostor's Advanced Compressed Air Energy Storage Project**.

### The Far West region continues to face key economic and workforce challenges



**1.8%** population decline since 2018.



Housing vacancy rates sit at 0.5%, with median house prices having risen by 14% since 2018.



The proportion of the population over 55 years has increased by 4.2% since 2018.



Unemployment across the region was between 4.4% and 8% as at June 2022, with job vacancies climbing to a record 1,440 in August 2022.

## The Far West region's key industries (energy, health, mining and agriculture) continue to remain resilient, with agriculture growing strongly in recent years



### Mining

- **0.1 %** Year-on-Year (YoY) growth from 2011-2020

**\$ 346 million** Gross Value Added (GVA) in 2020

**799 jobs** supported in 2021



### Agriculture

+ **11.8 %** YoY growth from 2011-2020

**\$ 90 million** GVA in 2020

**431 jobs** supported in 2021



### Health Care

+ **4.4 %** YoY growth from 2011-2020

**\$ 138 million** GVA in 2020

**1,638 jobs** supported in 2021



### Energy (including renewables) and water supply

+ **2.3 %** YoY growth from 2011-2020

**\$ 88 million** GVA in 2020

**138 jobs** supported in 2021

## Key themes from local consultation

Stakeholders from the Far West region have highlighted housing and land supply and collaborative approaches to economic growth and community development as key priorities for the region.

### Housing availability



An inability to provide worker housing has been reported as a cause of employment contracts falling through after skilled workers had accepted a job offer in the region.

### Land availability



Land accessibility for development (industrial and residential) was consistently reported as a significant issue in the region, constraining both economic and population growth.

### Improving digital connectivity



Stakeholders highlighted the need to improve digital connectivity and mobile phone coverage in the region, so to deliver increased community amenity, assist with skilled worker attraction and retention and support growth in key industry sectors.

### A need for greater support and collaboration



Local government, businesses and community representatives expressed concerns over difficulties in navigating complex government funding and support mechanisms with limited resources.

## Far West REDS - 2023 Update strategies and enablers

Strategies	Enablers
<p><b>Support engine industry growth by developing regional connectivity and transport links.</b></p>	<ul style="list-style-type: none"> <li>• Improve producers' access to markets through continual improvements to the region's road network and associated infrastructure.</li> <li>• Facilitate improved movement of people and freight through upgrades to air connectivity services and infrastructure such as the Broken Hill Regional Airport.</li> </ul>
<p><b>Grow the arts and recreation, film and television, and visitor economy sectors by capitalising on the region's heritage, cultural, seasonal and natural endowments.</b></p>	<ul style="list-style-type: none"> <li>• Provide training pathways and ongoing support for Aboriginal communities to develop the skills required to support the growth of cultural tourism offerings in the region.</li> <li>• Support investment in arts and recreation infrastructure to develop the arts and film industries in and around Broken Hill and Silverton.</li> </ul>
<p><b>Facilitate industrial growth through activation of industrial land to grow economies of scale around urban centres and renewable energy generation and storage.</b></p>	<ul style="list-style-type: none"> <li>• Activate existing industrial land (including connecting and consolidating under-utilised industrial zoned areas), and consider opportunities to activate new industrial land by converting former mine sites into commercial and/or industrial uses.</li> </ul>
<p><b>Deliver telecommunications infrastructure to empower businesses and residents through improved connectivity in the digital economy.</b></p>	<ul style="list-style-type: none"> <li>• Support councils to use the Connectivity Index Tool following its 2023 release to identify priority locations for upgrades to telecommunications infrastructure, and support delivery agencies to embed minimum connectivity standards into infrastructure programs.</li> </ul>
<p><b>Grow the region's workforce by developing local skills capacity and enhancing liveability to support workforce attraction and retention.</b></p>	<ul style="list-style-type: none"> <li>• Implement recommendations from the Draft Western Regional Water Strategy to improve water security in the region.</li> <li>• Develop a workforce strategy focused on developing insights and actionable strategies to attract workers to the region, including consideration of key service provision and ensuring that training initiatives match local skills needs.</li> </ul>

## 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: View of the Queens Head Hotel in Wilcannia, Central Darling LGA. Photo credit: Destination NSW.



Figure 2: The Living Desert and Sculptures, Broken Hill. Photo credit: Annabel Laing.



### 3. About the Far West region

The Far West FER incorporates the Broken Hill and Central Darling Local Government Areas, as well as the Unincorporated Far West. While relatively sparsely populated, the region includes around 18% of NSW’s total land area. Broken Hill is home to the majority of the region’s population, with smaller towns and villages including Ivanhoe, Menindee, Tibooburra, Wilcannia and White Cliffs.

Total area covered (km <sup>2</sup> )	146,981
Population (2021)	20,441
Broken Hill	17,661
Central Darling	1,760
Unincorporated NSW	1,020
Size of the economy (2020)	\$1.406 billion
Total employment (2021)	8,091

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







Figure 3: Map of the Far West Functional Economic Region.

## 4. The 2018 Far West REDS





In the 2018 Far West 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 below.

### 2018 Far West strategies

	<p>Support growth in agriculture and mining by developing regional connectivity and transport logistics to better access markets.</p>
	<p>Grow the film and television industry and visitor economy by capitalising on the region's heritage, cultural, seasonal and natural endowments.</p>
	<p>Facilitate food and metal manufacturing industry growth through development of industrial land to grow economies of scale around urban centres and sustainable energy generation and storage.</p>
	<p>Improve economic and social resilience by delivering telecommunications infrastructure to empower businesses and residents through improved connectivity in the digital economy.</p>















### 2018 Far West specialisations

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

	<p>Tourism</p>
	<p>Mining</p>
	<p>Agriculture</p>
	<p>Health care and social assistance</p>

## 2018 Far West endowments

The Far West region is home to a range of physical, institutional, built and social endowments. These endowments play a key role in enabling success and growth across its industry specialisations.

Endowment	Relevant 2018 specialisation
Ferrous and non-ferrous ore resources	
Significant mining operations (Perilya Limited Mines, Castillo Copper, Hawson's Iron Project, Broken Hill-Rasp Mine, Crystal Mining Mineral Sands Operations, Cobalt Blue)	
Areas for gas exploration (Bancannia Trough, Pondie Range Trough)	
Prime agricultural land for rangeland wool and beef production	
Warm climate (conducive to early horticultural crop yields)	
Menindee Lakes and Lower Darling river systems	
Native kangaroo and feral goat populations	
High levels of solar radiation	
Open spaces and 'big sky'	
Unique desert landscape	
Broken Hill City national heritage listing	
Rich Aboriginal heritage	
Industrial history	
Growing film and television industry	
Creative community	

## 5. The big picture: Shocks and trends impacting the Far West region since 2018



Figure 4: Court House, Broken Hill. Photo credit: Broken Hill City Council.

### Significant events impacting major industries

A sustained period of drought from 2017 to 2020 had severe environmental, social and economic implications for the region. The COVID-19 pandemic further challenged the region, with local businesses suffering. From the period 2018 to 2022, the region had four disaster declarations<sup>[1]</sup> and received \$8.21m in disaster recovery grants funding.<sup>[2]</sup> Recovering from these events and developing both industry and community resilience has been a key priority for the region since 2018.

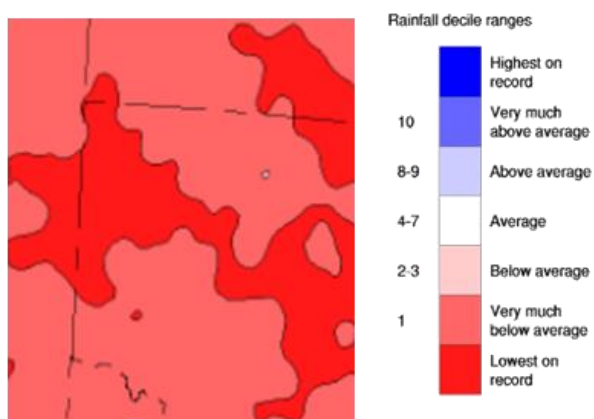


Figure 5: Rainfall deciles, Far Western NSW, 1 January 2017 to 31 December 2019 (Australia Bureau of Meteorology).

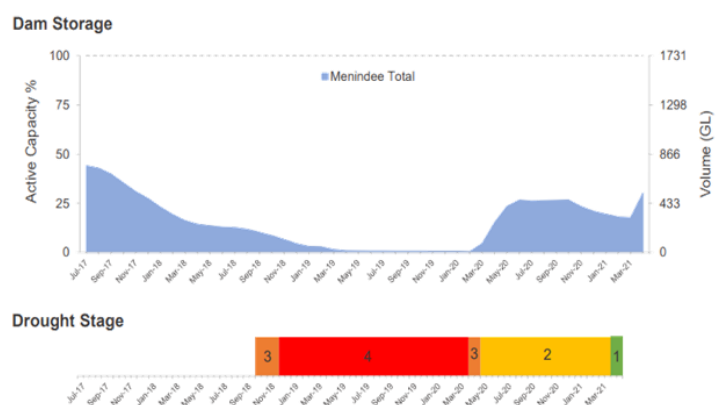


Figure 6: Menindee Dam Storage levels, July 2017 – March 2021 (Department of Planning and Environment, 2021).

## Drought

The 2017 to 2020 drought was the worst on record in terms of storage inflows for the Menindee Lakes, with inflows from February 2018 to January 2020 73% less than the previously recorded low.<sup>[3]</sup> This resulted in widespread fish deaths, significant reductions in irrigation allocations and strict water restrictions for community and industry.

The impacts of prolonged drought go beyond direct impacts, particularly for a region like the Far West with a large agricultural sector. Once the drought broke, there was an extended recovery period before livestock were ready to be sold, resulting in higher rates of financial stress and an increased prevalence of mental health concerns.<sup>[4]</sup> Ensuring long-term water security for the region will be a key priority, given its role in maintaining liveability for existing residents, as well as in supporting population and industry growth capacity.

## COVID-19


The COVID-19 pandemic had significant impacts on businesses in the Far West region, with 50% of businesses reporting that the pandemic negatively affected their operations.<sup>[5]</sup> The region also saw increased prevalence of financial insecurity over the course of the pandemic, with Jobseeker recipients increasing by 31%, and health card recipients by 22%, from March to June 2020.<sup>[6]</sup> The pandemic also exacerbated an existing shortage of health professionals in the region, resulting in difficulty accessing GP services and long wait times for treatment.<sup>[7]</sup>




## Floods

The Far West region was hit by severe weather and flooding in late 2021 and early 2022, with flash flooding resulting in damage to homes, infrastructure, and loss of life.<sup>[8]</sup> The NSW government recognised the gravity of the impact by opening up access to Special Disaster Grants, small business concessional loans, and transport subsidies to those affected.<sup>[9]</sup> In late 2022 and early 2023, substantial flood events again impacted parts of the region including Tilpa, Wilcannia and Menindee, driven by major inflows in the Darling River. The region has experienced sustained flooding of agricultural land, damage to roads, fences and infrastructure, and inundation of some low-lying residential properties.<sup>[10]</sup>

## Macroeconomic trends shaping the region's future

Macroeconomic trends related to climate, digitisation, and supply chain uncertainty have played a significant role in the development of the Far West region since 2018, and are likely to continue to have an influence on its future. With a strong reliance on mining and agriculture, the Far West region faces challenges in ensuring economic resilience as these industries work towards decarbonisation. However, opportunities for innovation and growth in new sectors have also emerged that can drive future growth.

Trend	Opportunities and risks	
 Digital Transformation	<p>The COVID-19 pandemic has seen online services and the digital economy expand rapidly, with growth in e-learning, telehealth, online social support services, e-shopping and remote work following service and behavioural adaptations to successive lockdowns.<sup>[11]</sup></p> <p>Consultation revealed challenges with poor telecommunication connectivity and inequitable essential services access for those with lesser access to technology or lower digital literacy across the region, with impacts on wellbeing as well as industry and business growth.</p>	<p>Enhancing digital and telecommunications connectivity will reduce the risk of a widening 'digital divide' with other regions, while supporting business and industry growth and improved access to services for the community.</p>

Trend	Opportunities and risks	
 <p>Changing Migration Patterns</p>	<p>As a result of the pandemic, many regional areas saw an influx of internal migration from city-dwellers seeking a lifestyle change, with regional NSW gaining an additional 26,800 residents while Sydney declined by 5,200 from 2020-2021.<sup>[12]</sup> However, the Far West has not experienced this influx on a significant scale.</p> <p>Stakeholders indicated that some workers from outside of the Far West have accepted jobs in the region while working remotely, which was noted as potentially having negative impacts on the region as these workers do not contribute to population-based economic growth or related funding opportunities.</p>	<p>Investing in workforce capacity and capability enablers, such as housing and training infrastructure, can aid the region to grow the local labour force.</p> <p>Enhancing regional connectivity and services across Far West communities can aid in attracting skilled workers to move to the region.</p>
 <p>Towards Net Zero</p>	<p>Mining represents the Far West region's largest sector by GVA, more than double any other industry contribution. The high emission rates involved in mining sector activities makes the region particularly vulnerable to decarbonisation and net zero targets.</p> <p>Beyond implications for the mining industry, the agriculture sector in the Far West may also face challenges brought about by decarbonisation, with adaptations in farming land use and practices recognised as a key component of Australia's journey towards net zero.<sup>[13]</sup></p>	<p>The region is well-placed for renewable energy generation, given its high sunlight radiation (solar energy) and disused mining infrastructure potentially available for repurposing. Transmission network upgrades need to keep pace with generation capacity to realise benefits.</p> <p>Supporting farmers to deploy low-emissions technologies and practices can build agricultural industry resilience and support their role in the shift towards net zero.</p>
 <p>Rising Uncertainty</p>	<p>The Far West region is facing increasing uncertainty brought about by climate change, with projections showing temperatures are expected to keep rising, rainfall patterns will change, and droughts will become more severe.<sup>[14]</sup></p> <p>Meanwhile, widespread and persistent supply chain disruptions are bringing about shortages of components and goods and causing volatility in the cost of raw materials, which has increased capital cost of construction.<sup>[15]</sup></p>	<p>Supporting local manufacturing to reduce reliance on strained supply chains can support increased resilience.</p> <p>Investing in climate resilient infrastructure will be critical to the resilience of local businesses and communities.</p>

## 6. Responding to change: Initiatives and investments since 2018

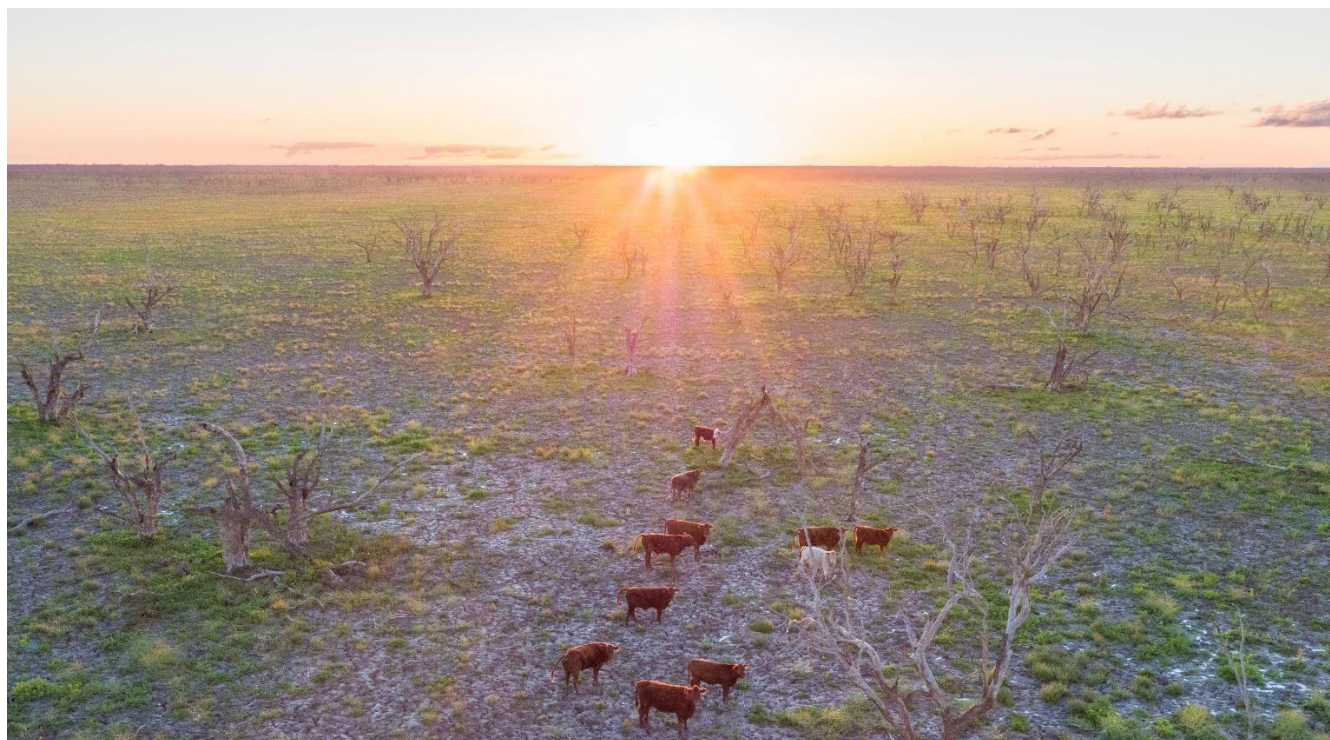


Figure 7: Afternoon sun shines over cattle grazing in the Menindee Lakes region. Photo credit: Destination NSW.

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 <b>Far West Regional Plan 2041</b> seeks to support the creation of a diverse economy, supported by the right infrastructure, an exceptional natural environment and resilient communities.	
<b>Local Strategic Planning Statements</b> from Central Darling Shire Council and Broken Hill City Council outline each area's plan to support industry growth and increase resilience against future shock, particularly in light of the recent prolonged drought.	
Since 2018, Broken Hill City Council and Central Darling Shire Council have refreshed their <b>Community Strategic Plans</b> , with a focus on fostering a highly liveable community supported by a diverse and resilient economy.	
Central Darling Shire Council reviewed several community plans in 2022, including <b>Improvement Plans for Menindee, White Cliffs, Ivanhoe, Sunset Strip, and Tilpa.</b>	
Broken Hill City Council is currently developing the <b>Broken Hill CBD Masterplan</b> , which seeks to enhance amenity and accessibility.	
The <b>Broken Hill Cultural Plan</b> outlines a long-term vision for culture in Broken Hill, including planning for cultural infrastructure, events, programs and partnerships.	

The **Destination Country and Outback Destination Management Plan 2022-2030** guides industry on priority strategies and required actions that will drive the growth of the regional economy at the visitor level.



The **draft Western Regional Water Strategy** seeks to improve the resilience of future flows and storage in the region, as well as develop a greater understanding of and approach to meeting future industry and resident water demands.



## Significant investments since 2018

As shown in Figure 8, 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 sealing of major roads in the region, essential infrastructure upgrades and a range of projects associated with the visitor economy and enhancing local amenity. Grant funding has played a key role in delivery of many of these projects.

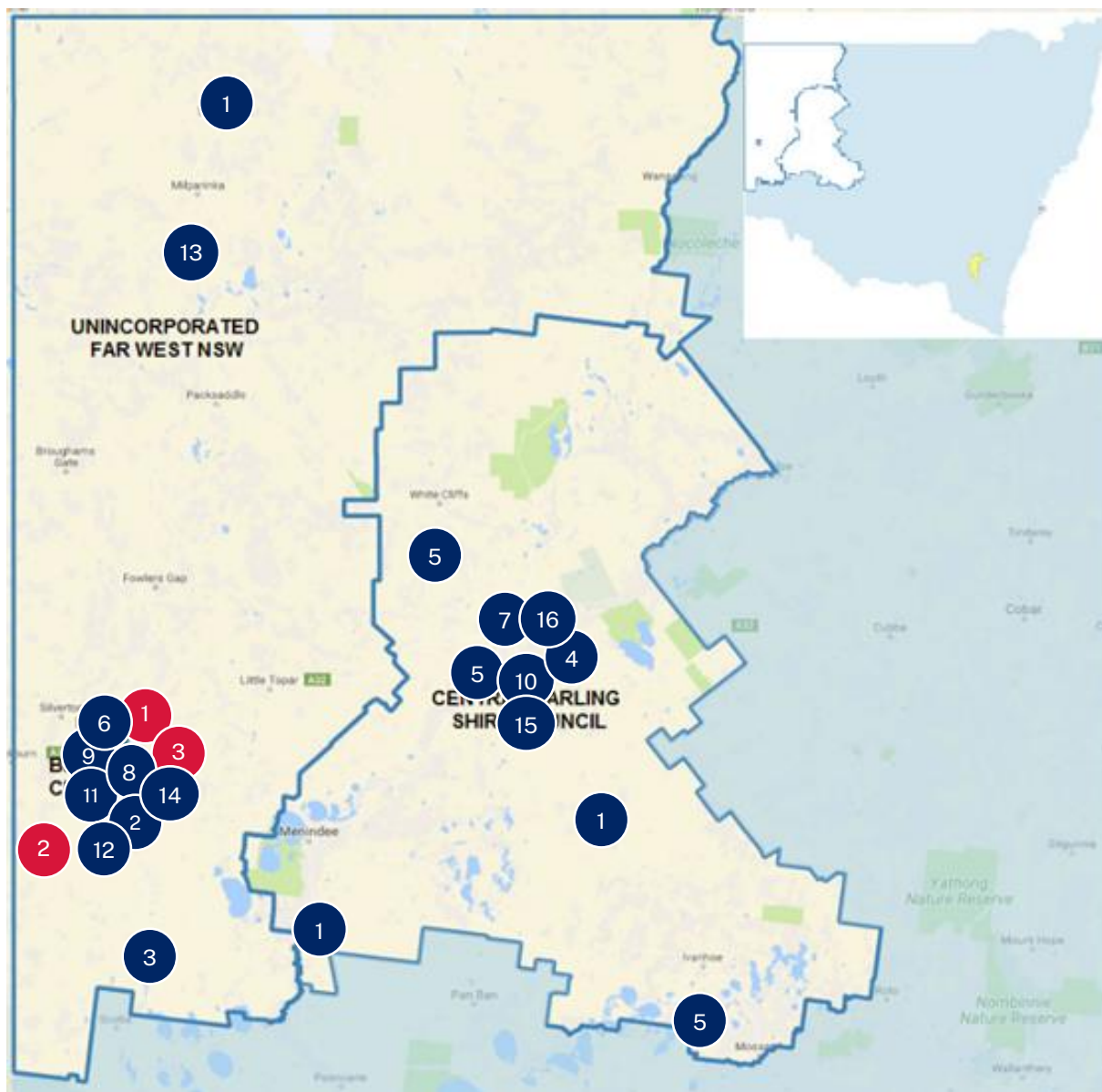















Figure 8: Significant investments in the Far West region since 2018.



## Major private investment since 2018







Investment	Estimated total project value	Relevant 2018 strategies
1 Broken Hill Battery Energy Storage	\$41 million	
2 Cobalt Blue Critical Minerals project <sup>1</sup>	\$560 million	
3 Silver City Storage Centre - Hydrostor advanced compressed air energy storage <sup>2</sup>	>\$650 million	

## Major public investment since 2018

Investment	Estimated total project value(s)	Relevant 2018 strategies
1 Sealing of Silver City Highway, Cobb Highway and Pooncarie Road	\$184.6 million	
2 Broken Hill Airport upgrades	\$7.5 million	
3 Wentworth to Broken Hill Pipeline	\$500 million	
4 Wilcannia Weir replacement	\$30 million	
5 Water Treatment plants - Ivanhoe, White Cliffs and Wilcannia	\$11 million	
6 Broken Hill Emergency Department upgrade	\$10 million	
7 Maari Ma Community Health Facility	>\$7 million	
8 Broken Hill police station upgrade	\$16 million	
9 Broken Hill Cultural Precinct and Library	\$8.7 million	
10 Baaka Cultural Centre Wilcannia	\$5.57 million	

<sup>1</sup> This project has been supported by funding under the Commonwealth Government's Critical Minerals Accelerator Initiative.

<sup>2</sup> Supported by funding from the Australian Renewable Energy Agency

11	Broken Hill Line of Lode upgrade	\$5.7 million	
12	Royal Flying Doctors Service Broken Hill visitor experience	\$5.5 million	
13	Sturt's Steps tourism project	\$5.2 million	
14	O'Neill Sporting Precinct redevelopment - Stage 1	\$2 million	
15	Roads to Home project - Wilcannia	Not available	
16	Wilcannia LALC exclusion fencing	Not available	

### Regional grant programs

The region has received \$54.65 million in grant funding since 2018. Key programs in the region have included the Stronger Country Communities Fund, which saw \$15.89 million committed to projects ranging from sports facility upgrades to bush hostel renewal works.

Grant category	Approved funding
Community	\$31.11 million
Economic	\$15.34 million
Disaster recovery	\$8.21 million

Note – approved funding amounts only includes programs managed by the Department of Regional NSW and are accurate as of January 2023.



Figure 9: Historic Wool Shed, Kinchega National Park. Photo credit: Broken Hill City Council.

## 7. Far West 2023 economic snapshot

Large representation of people over 55-years presents a challenge for the region in maintaining a strong working base to support economic growth.

The region has seen population decline over the past decade. However, the rate of decline is reducing and the potential for positive population growth in future exists if population-serving infrastructure and services can be put in-place and benefits delivered to communities from major projects can be maximised.

### Population growth

As shown in Figure 10, while the Far West region has experienced population decline over the past decade, the rate of decline has significantly slowed since 2015, with the 2021 population reduction of 0.36% notably less than the 2016 rate of 1.32%.

Looking ahead, if enabling infrastructure and adequate housing can be put in place, alongside reliable service provision in key sectors including education and childcare, the region shows promise of experiencing population growth in coming years.

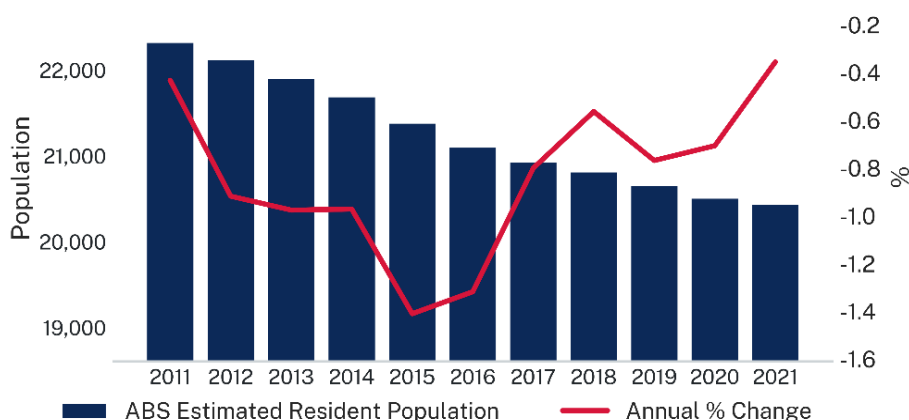


Figure 10: Far West FER population growth, 2011-2021 (ABS ERP, July 2022).

Some forecasts estimate that the Broken Hill population may increase by 3.4% between 2018 to 2031, which would add approximately 600 residents to the region's population.<sup>[16]</sup>

### Demographic profile

The Far West region has an older population with a median age of 44 compared to the NSW benchmark of 38 (see Figure 11). Almost half (48%) of the region's population is over the age of 55 years, a proportion approximately 20% higher than the NSW benchmark, while the proportion of the population aged 20-49 sits approximately 15% lower. This highlights a challenge for the region's ability to provide a workforce to support growth in engine and emerging industries. A focus is needed on the provision of sufficient services such as health care, education, and childcare to attract skilled workers to relocate to the region.

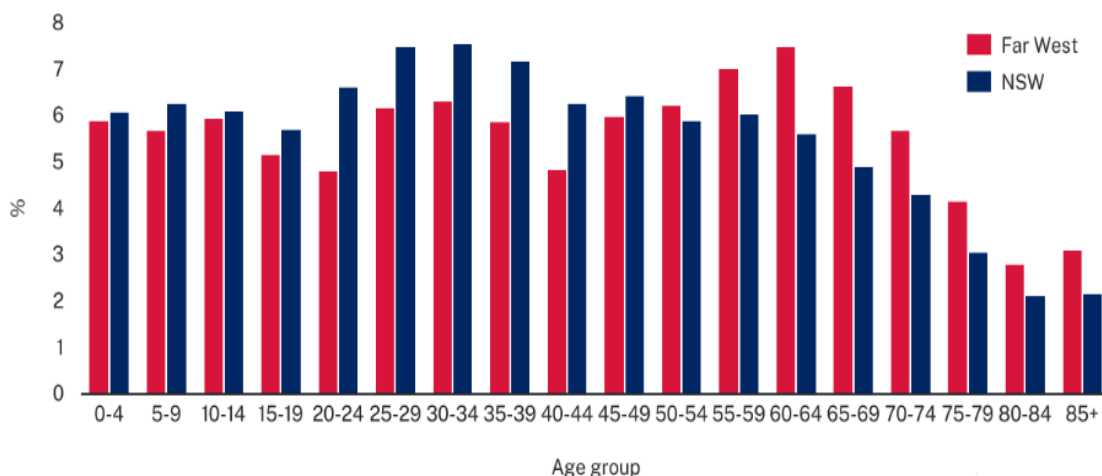


Figure 11: Far West FER population by age, 2021 (ABS ERP, July 2022).

## An undersupply of housing in the Far West is a constraint to workforce attraction and retention, but housing affordability remains a strength.

The Far West region has seen moderate house price growth since 2018, but residential vacancies have shown a steep decline. A lack of housing availability may be constraining the ability to attract workers to the region. Availability of land ready for development may also be a key factor in limiting increased housing supply.

### Housing availability

As displayed in Figure 12, residential vacancy rates in Broken Hill have dropped from 4% in May 2019 to 0.5% in August 2022. This is unlikely to be caused by population growth since the region has experienced decline in recent years. Instead, an unavailability of land for residential development, alongside a decline in the quality of housing available may represent key supply side issues. This hypothesis is supported by relatively low residential building approval rates in the region, with most months since 2018 recording minimal approvals.

Another factor highlighted by local stakeholders as having a bearing on the capacity of the region to increase housing supply was a high-risk rating typically applied to remote communities by financial institutions. This can make obtaining loans for buying or building homes challenging. In addition, available housing stock in the region is often unsuitable or uninhabitable due to poor or little maintenance, further exacerbating housing availability issues.

### Housing affordability

Between June 2018 and June 2022, median house prices in the Broken Hill LGA rose 14% from \$152,000 to \$173,000, while insufficient information was available to measure median house price changes in Central Darling Shire or unincorporated NSW.<sup>[17]</sup> While this price rise is significant, the price-to-income ratio in July 2021 was 1.99 in the Far West, substantially lower than the NSW wide average of 8.12.<sup>[18]</sup> This suggests that housing affordability could represent a competitive advantage for the region in attracting key workers, provided that good quality housing stock is available to meet demand across the region.



Figure 12: Far West 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 Far West has seen increases in unemployment since 2018 coupled with significant increases in job vacancies, which suggests a skills mismatch.

Rising job vacancies and unemployment levels indicate a need to prioritise local skills development alongside workforce attraction initiatives, so to maximise the benefits to the community from new projects and economic growth. The healthcare sector is facing acute shortages, and this represents a key challenge given the region’s ageing demographic profile and an ambition to see future population growth.

## Employment

As at June 2022, LGAs across the Far West region (including Unincorporated NSW) had unemployment rates of 8.0% in Central Darling, 5.6% in Broken Hill and 4.4% in Unincorporated NSW.

This represents an increase on the relatively low unemployment rates that were observed across the region in 2019 and 2020, after a downwards trend from 2016 onwards (see Figure 13).

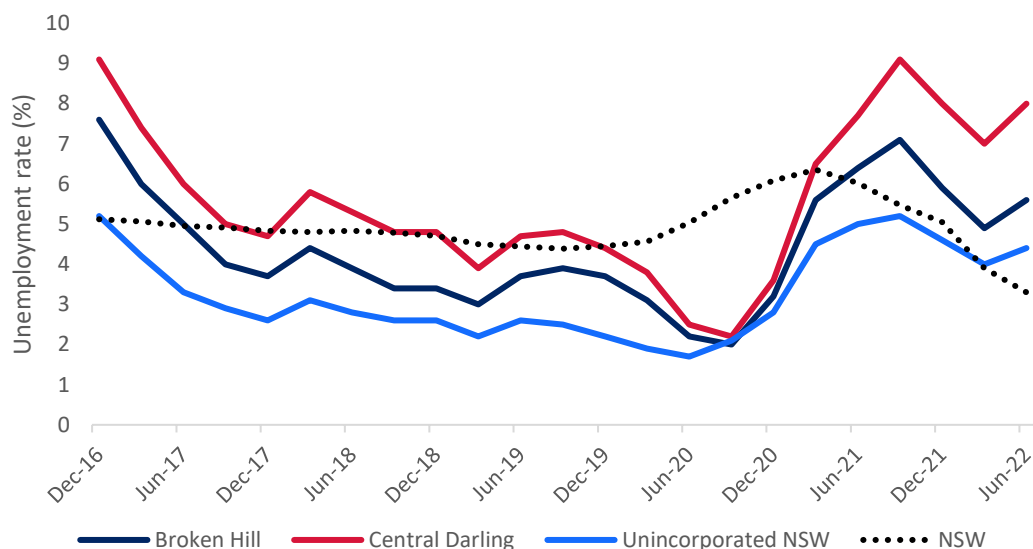


Figure 13: Far West region unemployment rates (%), 2016-2022 (National Skills Commission, 2022; ABS Labour Force, 2022)

As shown in Figure 14 below, despite this increasing rate of unemployment, job vacancies in the broader Western NSW region more than tripled between April 2020 and October 2021, with widespread demand across sectors and a particularly acute need for medical practitioners and nurses. For the Far West region, this suggests a skills shortage or mismatch, which can constrain industry and business growth and impede service delivery in essential services, such as healthcare and education.

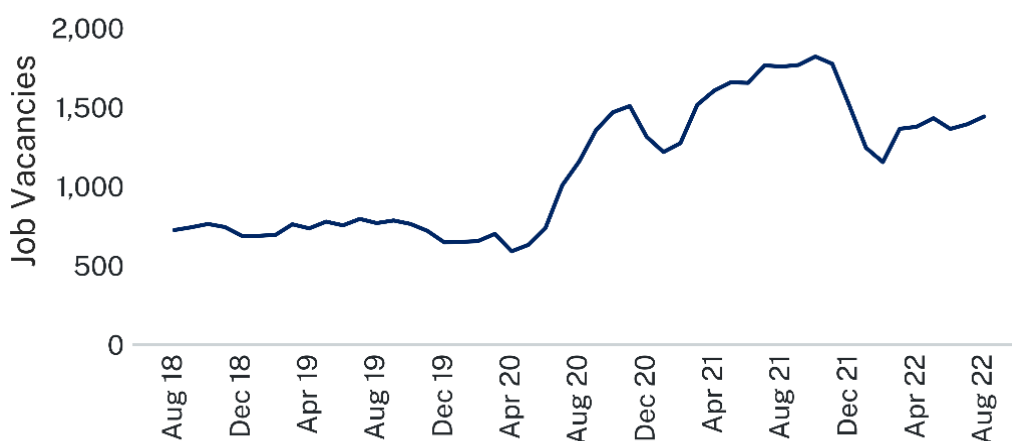


Figure 14: Job vacancies, Dubbo and Western NSW region (2018-2022) (Regional IVI, National Skills Commission, 2022).

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.

## Aboriginal economic development

There has been significant progress in the employment of Aboriginal people in the Far West. The Aboriginal unemployment rate has almost halved from 22.1% in 2016 to 11.5% in 2021. However, the rate remains above the NSW-wide Aboriginal unemployment rate of 9.8% and well above the whole of NSW unemployment rate of 4.9%.

Aboriginal unemployment rate: Far West	2011	22.7%
	2016	22.1%
	2021	11.5%
NSW Aboriginal unemployment rate	2021	9.8%
NSW unemployment rate	2021	4.9%

Source: ABS Census, 2021

Economic and social outcomes for Aboriginal people in the Far West continues to be a strong focus for the region. This includes a focus on providing ongoing support and opportunities to Aboriginal communities including training and upskilling to increase pathways to fulfilling employment.

Looking forward, there is a need to ensure increased collaboration between key organisations and the Aboriginal community continues to be a key focus. In particular, significant opportunity exists to support prosperity by ensuring the design and delivery of government support programs is locally led by Aboriginal communities and representatives.

Significant economic development opportunities may also exist related to the region's wealth of Aboriginal cultural heritage, which could support the development of cultural tourism as part of the broader visitor economy.



Figure 15: Men from the Barkindji Nation dancing beside the Darling River, Wilcannia. Photo credit: Destination NSW.

## Far West region 2023 engine and emerging industries

The Far West has a \$1.4 billion economy driven by key engine and emerging industries. Despite significant shocks since 2018, the Far West region's 2018 engine industries have remained a source of economic stability and growth. The relative strength of industries is highlighted through Location Quotient (LQ) analysis<sup>1</sup> as displayed in Figure 16, in which the size of the bubbles correlates with industry size.

### Engine industries

The **mining** sector (LQ of 5.27), despite a 0.1% average annual decrease in GVA between 2011 and 2020 remains the Far West's most valuable sector, adding \$346 million to the local economy in 2020.

**Agriculture** generated \$90 million in GVA in 2020, having grown by 11.8% per year between 2011 and 2020, despite the impacts of prolonged drought. The key subsector is sheep, grains, beef and dairy, which generated 84% of the sector's output, largely concentrated in grazing and rangeland farming.

Since 2018, **electricity and water services** have also emerged as an engine industry for the region, due to major infrastructure investments such as the Broken Hill Water Pipeline. This sector accounted for \$88 million in GVA to the regional economy in 2020, and with significant energy related investments at advanced stages of development, this sector is likely to continue to grow in future.

The **tourism** sector is also strong driver of economic output in the Far West region bringing in \$161 million in visitor spending in 2019. Whilst COVID-19 lockdowns saw a \$93 million reduction in expenditure in 2021, highlighting the sector's volatility, tourism still demonstrates strong performance in recent years.<sup>[19]</sup>

Although considered to be an enabling industry rather than an engine industry, the **health care** sector also remains a key contributor to the regional economy, adding \$138 million in 2020. Enabling further growth in this industry is particularly important given the current ageing demographic profile of the population, and ambitions for positive population growth in coming years.

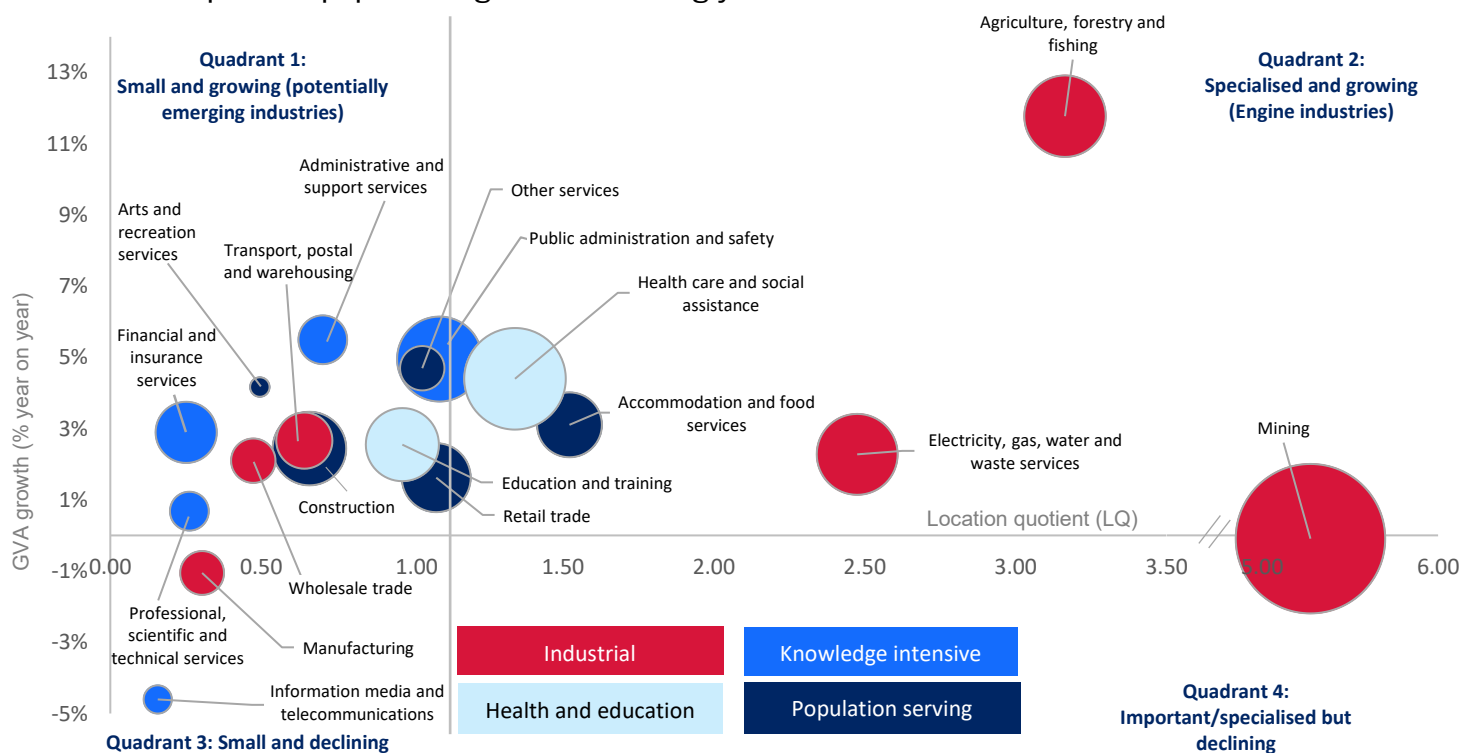


Figure 16: Location Quotient (LQ) Analysis by GVA, 2011-2020 (REMPLAN, 2020)

\*While the 2018 REDS used employment data as the basis for LQ analysis, the 2023 Update has used GVA data. This allows for a clear demonstration of the changing economic impact of both engine and emerging industries across the regions.

<sup>1</sup> 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 17), reflecting the impact of the COVID-19 pandemic on key emerging industry sectors.

**Information Media and Telecommunications** was highlighted as a key industry for potential growth in the 2018 REDS. While the industry has shrunk annually by an average rate of 4.6% between 2011 and 2020, there is scope for the sector to rebound significantly, particularly since the unique landscapes remain as an endowment.

Service-sector offerings in the region have demonstrated significant growth over the past decade, with **repair and maintenance** a strength for the region, adding \$12 million to the economy in 2020 and growing 4.7% year-on-year since 2011. This growth is likely attributed to the maintenance needs of the Far West's substantial mining and industrial sector.

Meanwhile, the **arts and recreation** sector increased its value-add by approximately 50% between 2011 and 2020. Though still a relatively small sector, contributing \$6 million in 2020, its complimentary role associated with the visitor economy and information media and telecommunications can help the sector growth in future years so to develop a strong integrated creative offering.

While the region's **education and training** industry has shown lower average annual growth compared to the rest of NSW, its annual value add has increased by \$14 million since 2011, to reach GVA of \$72 million in 2020. Investments such as the Country Universities Centre demonstrate potential avenues for enabling growth in the sector, with skills development and uplifting workforce capacity an enabler of ongoing growth in the Far West.

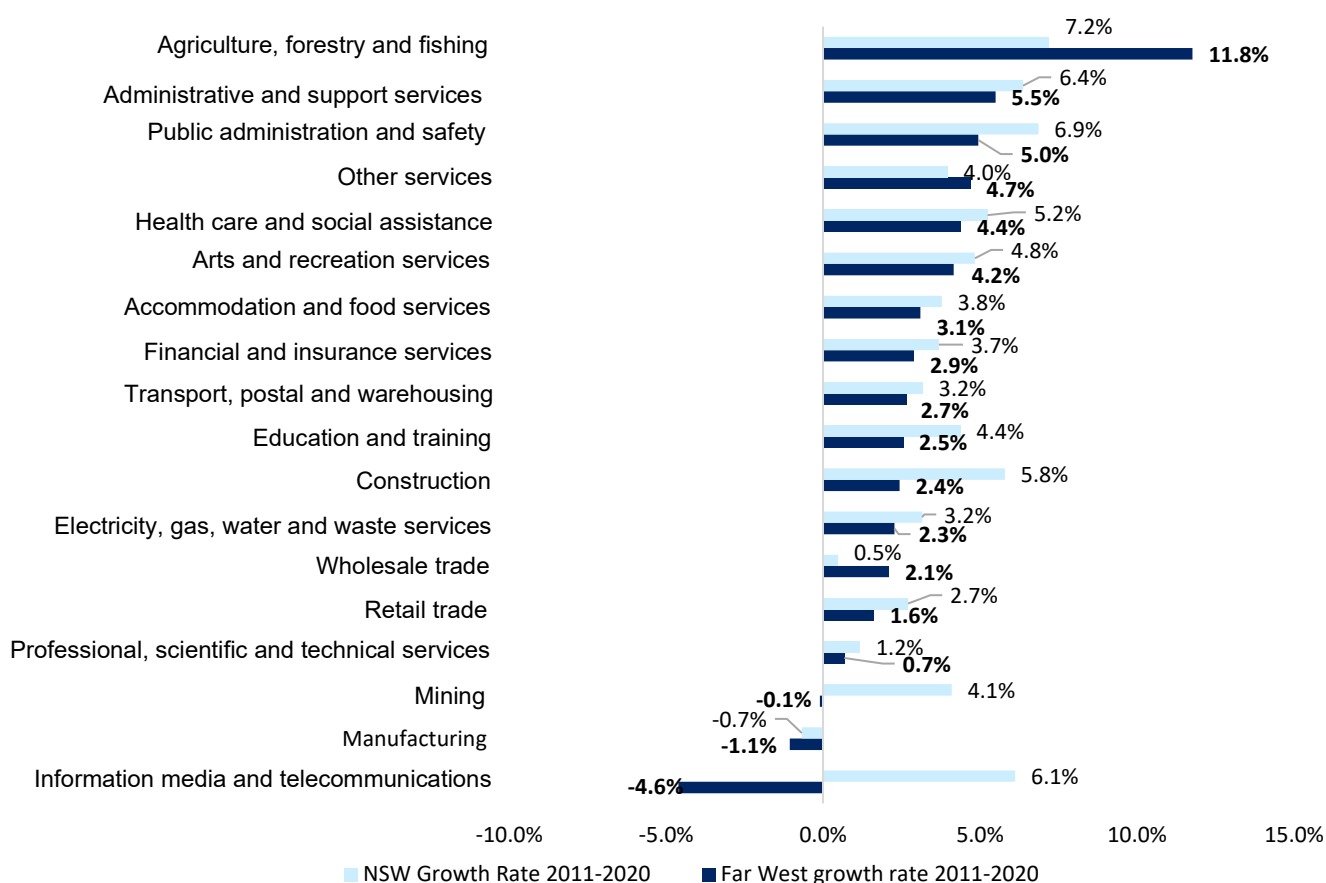


Figure 17: Change in GVA by industry (% YOY), 2011-2020 (REMPLAN, 2020)



## Far West region 2023 endowments

### Review of the 2018 endowments

The 2018 REDS identified a range of endowments underpinning the Far West's economy and regional competitiveness (see page 11). Despite recent shocks impacting many of these key endowments, consultation confirmed they remain valid for the region, with key endowments including:

- Ferrous and non-ferrous ore mining
- Agricultural land (and water resources)
- Sun, sky, open spaces and landscape
- Heritage and culture

### New endowments

While not yet reflected in the employment and industry specialisation (LQ) analysis, recent investments and policy efforts have supported the creation or emergence of new endowments that can underpin new economic opportunities and future specialisations.

+ Mining voids	There are emerging opportunities in the revitalisation and re-use of mining infrastructure, with proposed investment like the Compressed Air Energy Storage Project demonstrating the potential contribution of this endowment to energy security and economic diversification.
+ Education infrastructure - Country Universities Centre Far West	The opening of this education facility offers significant potential in promoting skills development and the retention of youth in the Far West, both key economic priorities for growth.
+ Energy storage infrastructure	New assets such as the Broken Hill Battery Energy Storage System and the upcoming Compressed Air Energy Storage Project will significantly improve energy security in the region and help enable further opportunities for investment into renewable energy projects in the region.

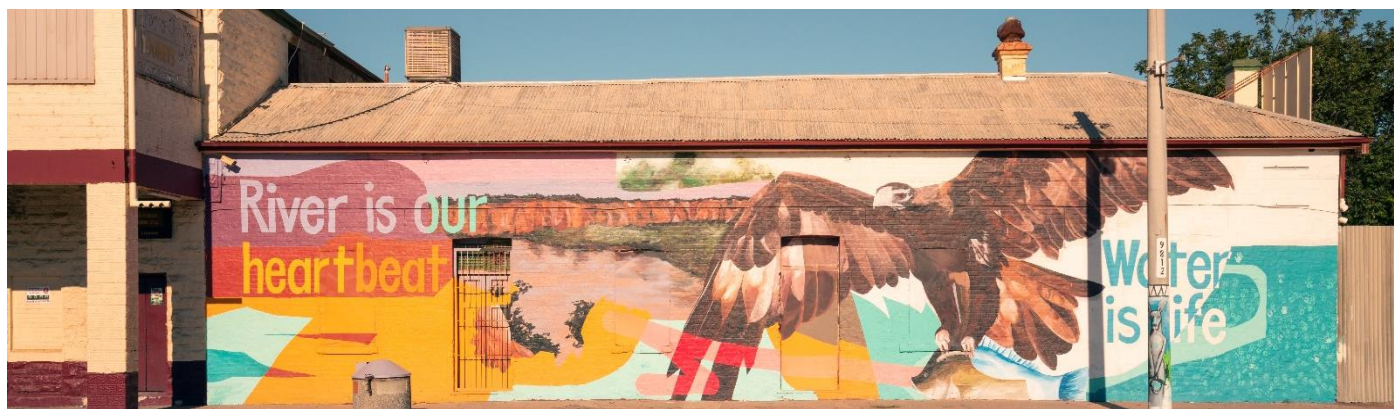


Figure 18: River is our heartbeat mural in Wilcannia. Photo credit: Destination NSW.

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

### Opportunities and vulnerabilities in engine and emerging industries

#### Mining

Although the industry faces challenges around climate change impacts and land availability, mining remains a strong economic performer for the Far West region.

GVA (2020, \$m)	346
Employment (2021)	799
LQ score (2020)	5.27
LQ Iron ore mining (2020)	36.2
LQ Non-ferrous metal ore (2020)	54.69

#### Strengths

- In 2020, Mining contributed 27% (\$346 million) of the region's total GVA, demonstrating that it remains the leading driver of economic prosperity in the Far West.
- The region has an abundance of ferrous and non-ferrous ore, with emerging capabilities in critical minerals that supplement these core specialisations and provide significant future opportunities for growth in the sector.

#### Vulnerabilities

- Given the significant level of emissions generated by intensive mining activity, the industry is highly susceptible to the impacts of decarbonisation and net zero targets.
- The growing need for land to support industrial and residential development can cause land use conflict with mining operations. National parks and Native Title are also perceived by residents to restrict potential locations for future expansion of mining activity.

#### Opportunities

- The Far West's manufacturing sector has recorded a decline over the past decade, with combined iron, steel and non-ferrous manufacturing activities contributing \$4 million to the local economy in 2020. There may be opportunities to support the revitalisation of this sector by a focus on increasing its role in value-add activities for the mining sector.
- The region is home to significant deposits of key critical minerals including cobalt, lithium and scandium. Investment into key transport infrastructure to support development of the critical minerals sector will be important to unlocking the economic potential of this sector in the Far West.

## Energy (including renewables) and water supply

The energy sector shows strong potential for growth in the Far West region, but requires a clear focus on delivering sufficient supporting infrastructure to unlock potential projects. Improved water security delivered by the Wentworth to Broken Hill Pipeline will benefit both the community and key industry sectors in the Far West.

GVA (2020, \$m)	87
Employment (2021) <sup>a</sup>	138
LQ score (2020)	4.22
LQ Electricity distribution (2020)	2.7
LQ Water supply, sewerage & drainage (2020)	30.6

<sup>a</sup> ANZSIC 1 digit, Electricity, gas, water and waste services.

### Strengths

- Recent commitments to, or investments already made into major energy storage capacity, such as the Silver City Storage Centre compressed air energy storage project and the Broken Hill Battery energy storage system, demonstrate the growing significance of the energy sector to the region.
- The region also benefits from a natural endowment of reliable solar radiation and large, flat open spaces, which could be ideal grounds for significant expansion into significant renewable energy generation.
- The Broken Hill Water Pipeline has significantly boosted the region's water security, by supplying up to 37.4 megalitres of water per day to Broken Hill.<sup>[20]</sup>

### Vulnerabilities

- Large-scale energy generation or storage projects are contingent on access to a large amount of developable land, which can be challenging given competing industrial and residential demands.
- The existing transmission line between Broken Hill and Buronga is an ageing piece of infrastructure that may constrain sector growth capacity, and will likely need upgrade to support significant renewable energy generation in the region.
- Wilcannia and Menindee's water security is likely to come under further strain in the face of a hotter and drier climate in coming decades.<sup>[14]</sup> Investment in infrastructure such as the Wilcannia Weir can help to address this vulnerability.

### Opportunities

- A focus on leveraging the reliable solar radiation of the region to develop significant further solar energy generation and storage projects can enhance energy security in the region, and increase reliability of supply for major industries such as mining.
- The draft Western Regional Water Strategy puts forward several opportunities for securing a more reliable water supply in the region beyond Broken Hill, including improving access to groundwater, investigating managed aquifer recharge and exploring opportunities for water recycling.<sup>[21]</sup>
- Repurposing of land and infrastructure from non-productive mine sites to support projects in emerging industries such as renewable energy production and storage presents an opportunity to maximise value of existing infrastructure in the Far West.

## Health care and social assistance

The health care and social assistance sector has continued to grow strongly in the Far West region. Improving digital connectivity in the region can help support service provision to more remote communities in the region, and a focus is needed on filling critical skilled worker shortages.

GVA (2020, \$m)	138
Employment (2021)	1,638
LQ score (2020)	1.34
LQ Health care services (2020)	1.4
LQ Residential care & social assistance (2020)	1.2

### Strengths

- Broken Hill Base Hospital provides health care services to Broken Hill and the surrounding area, including 24-hour emergency and maternity services. The Hospital also acts as a teaching base in rural health through the Broken Hill University Department of Rural Health.
- Although not an export-driven sector, health care and social services is the second-highest value-add industry in the region, contributing \$138 million in 2020.

### Vulnerabilities

- An ageing population demographic and the additional demand for critical health services this brings will continue to present challenges for the region's health system.
- A shortage of skilled workers is a key constraint for the health sector, with the region struggling to find medical practitioners and nurses.
- The remote nature of many communities in the region makes accessing health care a key challenge, with long travel times required to access major health infrastructure.

### Opportunities

- The region's emerging strengths in the education and training sector provides an opportunity for closer collaboration with health service providers, as a mechanism to grow the sector's local skilled worker base.
- Investing in the continued availability of telehealth services post-pandemic can aid remote settlements and communities to access health care services. Enhancing digital connectivity can support improved service provision to the more remote parts of the Far West.
- Improving physical connectivity through enhanced transport links offers potential to improve access to services for remote communities. This should include a focus on enhancing links to South Australia, which offers the closest major health care infrastructure for many parts of the Far West region.

## Agriculture

The agriculture sector has continued to record rapid growth in recent years in the Far West, highlighting its continued role as a key strength for the region. Improving physical and digital connectivity represents a key priority going forward for supporting ongoing growth in the sector.

GVA (2020, \$m)	90
Employment (2021)	431
LQ score (2020)	3.16
LQ Sheep, grain beef & dairy (2020)	5.3
LQ Agriculture support services (2020)	3.7

### Strengths

- Agriculture has long been a specialisation for the region, and average annual GVA growth of 11.8% over the past decade (see page 23) was well above the NSW rate of 7.2%, demonstrating its continued strength in the Far West.
- Natural endowments supporting the sector including prime pastoral land and a warm climate to aid in early harvests.

### Vulnerabilities

- The industry relies upon the favourable climatic conditions for production, which may present challenges in the face of projected impacts of climate change on the region including longer, harsher droughts.<sup>[14]</sup>
- Macroeconomic factors beyond the control of producers may influence supply chains and commodity prices and therefore have an influence on the value of outputs.
- While the sealing of the Cobb and Silver City Highway (to Tibooburra) has benefitted the industry's export capacity, other unsealed roads remain a key constraint to the sector's export capabilities.

### Opportunities

- Investing in enhanced digital connectivity can support the uptake of agtech in farming processes and aid industry resilience, particularly in light of ongoing climate change impacts.
- Improving physical connectivity through ongoing investment into transport infrastructure can increase export efficiency and access to markets.
- Exploring opportunities to reduce barriers to the purchasing of Western Land Leases (Crown Land) could help enable expansion of pastoralist properties in the region.

## Tourism

The Far West region has maintained its specialisation in tourism since 2018 despite movement restrictions associated with pandemic lockdowns. Enhancing connectivity by air, rail and road to the region needs to remain a key priority to support future expansion of the sector in the Far West.

Visitor spend (2021, \$m) <sup>[19]</sup>	93
Employment (2021) <sup>a</sup>	1,644
LQ score (2020) <sup>b</sup>	4.54
LQ Accommodation (2020)	2.8
LQ Food & beverage services (2020)	1.2

<sup>a</sup> Summation of ANZSIC 1 digit Retail trade, Accommodation and food services, Arts and recreation services

<sup>b</sup> LQ score is for the Accommodation and food services industry.

### Strengths

- The Far West region's unique natural endowments, such as desert landscapes, rangeland, and wide-open spaces, benefit its visitor economy.
- Cultural and industrial heritage, as well as a growing arts scene diversifies the region's offering.
- Broken Hill Airport enables direct access to the region with flights from major population centres including Sydney and Adelaide.

### Vulnerabilities

- Uncontrollable externalities can strongly influence tourism levels in the region. For example, COVID-19 restrictions reduced visitation by 48% between 2019 to 2021, with visitor spending in the region down by 42% (from \$161 to \$93 million) over the same period.<sup>[19]</sup>
- Climate change impacts also present challenges, with projections of more extreme weather potentially impacting destination attractiveness and access.
- Physical and digital connectivity represent key challenges for the sector in the Far West. Poor digital connectivity acts as a constraint on visitor safety, while poor condition of some local roads and unsealed stretches of arterial routes can make travelling by road challenging for visitors.<sup>[22]</sup>

### Opportunities

- There is opportunity to enable growth in niche tourism sectors such as big sky and agritourism through leveraging endowments, such as open spaces, in collaboration with key stakeholders such as pastoral lease holders.
- The region's wealth of Aboriginal cultural heritage provides significant opportunities for Aboriginal-led cultural tourism, which can also aid Aboriginal economic development.
- Continued investment into key transport infrastructure, including ongoing improvements to road networks and investment to enhance Broken Hill Regional Airport will be critical to supporting further industry growth in the region.

## Key themes in stakeholder consultation

Stakeholders from the Far West region noted that the area is facing challenges but remained optimistic that, given adequate enabling infrastructure and support, the region has potential to grow its economy and population in coming years.

Concerns around connectivity, both digital and physical, as well as achieving long-term water security were also high priority issues. Improving the quality of key enabling infrastructure was recognised as an important means of developing local amenity that can support the attraction and retention of skilled workers to the Far West region.

### **Housing availability**

Stakeholders outlined that current housing market challenges are a significant constraint on growth in the Far West. This includes not just availability of housing, but also the suitability and condition of housing. Some business owners reported that an inability to provide housing had been the cause of employment contracts falling through after skilled workers had accepted a job offer in the region.

### **Land availability**

Land accessibility for development (industrial and residential) was consistently reported as a significant issue in the region (in particular around Broken Hill) constraining both economic and population growth. Stakeholders noted that significant challenges exist in accessing and making use of Crown land, national parks and Native Title land, and this was creating further challenges associated with unlocking potentially productive land in the Far West.

### **Improving digital connectivity**

The need to boost digital connectivity and mobile phone coverage in the region for both business and community use was highlighted as a key priority by many stakeholders. Improved digital connectivity was seen as critical in supporting improved community amenity to assist with skilled worker attraction and retention, and as a key need to support the uptake of technology in the engine industry of agriculture and the expansion of the visitor economy.

### **A need for greater support and collaboration**

Representatives of local government, businesses and communities expressed concerns over difficulties in navigating complex government funding and support mechanisms with limited resources. This was noted as a particularly acute issue for small communities in the Unincorporated Area, where local services and economic development initiatives are often run by volunteers.

## Far West REDS -2023 Update strategies

The 2018 Strategies broadly remain relevant to the Far West region. However, a range of changes have been made to reflect new opportunities and challenges facing the Far West. Changes to the strategies have been made to:

- widen the growth focus to incorporate both the engine industries of mining and agriculture and also broader industrial development opportunities,
- reflect the growth of the arts and recreation sector as a potential emerging specialisation and this sector's close linkages to the visitor economy,
- create a focus on activating industrial land in the region to support growth in key sectors including renewable energy generation and storage, and
- introduce a new strategy focused on the need to prioritise local skills development and enhance liveability to support workforce attraction and retention.

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

Amended	<b>Support engine industry growth</b> by developing regional connectivity and transport <b>links</b> .
Amended	Grow the <b>arts and recreation</b> , film and television, and visitor economy sectors by capitalising on the region's heritage, cultural, seasonal and natural endowments.
Amended	Facilitate <b>industrial</b> growth through <b>activation of industrial land</b> to grow economies of scale around urban centres and <b>renewable</b> energy generation and storage.
Amended	<b>Deliver</b> telecommunications infrastructure to empower businesses and residents through improved connectivity in the digital economy.
New	<b>Grow the region's workforce by developing local skills capacity and enhancing liveability to support workforce attraction and retention.</b>

## 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
<b>Support engine industry growth by developing regional connectivity and transport links.</b>	Infrastructure	Improve producers' access to markets through continual improvements to the region's road network and associated infrastructure.	<b>Local Council</b> , Transport for NSW (TfNSW), Department of Regional NSW (DRNSW), Office of the Cross Border Commissioner (OCBC)	Greater physical connectivity improves the productivity and supply chain efficiency of engine industries.
		Facilitate improved movement of people and freight through upgrades to air connectivity services and infrastructure such as the Broken Hill Regional Airport.		



Strategy	New Enablers		Lead and support	Rationale
<p><b>Grow the arts and recreation, film and television, and visitor economy sectors by capitalising on the region's heritage, cultural, seasonal and natural endowments.</b></p>	<p>Infrastructure</p>	<p>Provide training pathways and ongoing support for Aboriginal communities to develop the skills required to support the growth of cultural tourism in the region.</p>	<p><b>Training Services NSW,</b> Local Councils, Local Aboriginal Land Councils (LALCs), Murdi Paaki Regional Assembly, Destination NSW, NSW National Parks and Wildlife Service (NPWS), TAFE NSW, Registered Training Organisations</p>	<p>Diversification of the region's tourism industry with Aboriginal-led initiatives to address a gap in employment outcomes.</p>
	<p>Infrastructure</p>	<p>Support investment in arts and recreation infrastructure to develop the arts and film industries in and around Broken Hill and Silverton.</p>	<p><b>DRNSW,</b> Local councils, Create NSW, Regional Arts Development Organisations</p>	
<p><b>Facilitate industrial growth through activation of industrial land to grow economies of scale around urban centres and renewable energy generation and storage.</b></p>	<p>Government, Regulation &amp; Information</p>	<p>Activate existing industrial land (including by connecting and consolidating under-utilised industrial zoned areas), and consider opportunities to activate new industrial land by converting former mine sites into commercial and/or industrial uses.</p>	<p><b>Local Councils,</b> DRNSW, Registered Native Title bodies corporate, NSW Land Registry Services, Department of Planning and Environment (DPE)</p>	<p>Availability of development-ready industrial land identified as a current barrier to growth, while disused mining sites present a significant diversification opportunity.</p>

Strategy	New Enablers		Lead and support	Rationale
<p><b>Deliver telecommunications infrastructure to empower businesses and residents through improved connectivity in the digital economy.</b></p>	<p>Infrastructure</p>	<p>Support councils to use the Connectivity Index Tool following its 2023 release to identify priority locations for upgrades to telecommunications infrastructure, and support delivery agencies to embed minimum connectivity standards into infrastructure programs.</p>	<p><b>NSW Telco Authority</b>, Local councils, DRNSW</p>	<p>Poor connectivity was widely reported as being a key growth constraint during consultation.</p>
<p><b>Grow the region’s workforce by developing local skills capacity and enhancing liveability to support workforce attraction and retention.</b></p>	<p>Infrastructure</p>	<p>Implement recommendations from the draft Western Regional Water Strategy to improve water security in the region.</p>	<p><b>DPE Water</b>, Water Infrastructure NSW, Local Councils, DRNSW</p>	<p>Improving water security is a high priority in developing more resilient communities and economies in the face of climate uncertainty.</p>
	<p>People and skills</p>	<p>Develop a workforce strategy focused on developing insights and actionable strategies to attract workers to the region, including consideration of key service provision and ensuring that training initiatives match local skills needs.</p>	<p><b>DRNSW, Training Services NSW</b>, Local councils, Office of Regional Youth, TAFE NSW</p>	<p>A skills gap is evident in the region and developing local workforce capacity will aid in reducing unemployment and enabling business growth.</p>

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Figure 19: An emu wanders in the scrub near Broken Hill. Photo credit: Annabel Laing.