

THE VISION

To continue to grow a sustainable long term economy based on diversity, efficiency, collaboration and vibrancy, through leveraging the Region's current and anticipated advantages in construction, manufacturing, logistics, tourism, agriculture, and mining.



CENTRAL ORANA

Regional Economic Development Strategy

2018 – 2022

PREFACE

The NSW Government has assisted local councils and their communities to develop 37 Regional Economic Development Strategies across regional NSW. Each strategy is designed around a group of local government areas that form a functional economic region as defined by economic data and community input. While the strategies have been developed using consistent methodology, each is a product of detailed data analysis and local community consultation to ensure ownership through a 'bottom-up' process: it sets out a vision for the region, the strategies, and early stage actions required to achieve the vision.

Regional Economic Development Strategies articulate a framework for identifying actions crucial to achieving the regional vision. Projects listed within this strategy should therefore be viewed as example projects that have emerged from the initial application of the framework. Adoption of these projects would be subject to further evaluative processes.

The power of the strategy is its ability to be used on an on-going basis to identify additional high value projects over time. By complimenting existing funding processes, these strategies present new opportunities to strengthen and increase investment in regional development across NSW.

Importantly, the strategy should be viewed as the first stage of a process that will assist those with an interest in the economic development of the region, particularly

councils, communities and local businesses, in planning their future economic activities. It provides a vehicle for engaging the community in a 'conversation' about regional needs and priorities, assists in bringing together key stakeholders and mobilising resources, and in so doing, can facilitate faster access to dedicated NSW Government funding, such as the Growing Local Economies Fund, and other types of government grants.

This Strategy, prepared by The Balmoral Group Australia, on behalf of the region and was formed in collaboration with the Dubbo Regional and Narromine Shire Councils, key stakeholders and the broader regional community, which benefited from economic-analytical assistance from the NSW Government's Centre for Economic and Regional Development (CERD).

It is presented in two documents: the *Central Orana Regional Economic Development Strategy 2018-2022* allows the reader to quickly and easily determine key content; while the accompanying *Central Orana Regional Economic Development Strategy – Supporting Analysis 2018-2022* details the Strategy methodology, evidence and development process.

For further information about the Regional Economic Development Strategies program please contact the CERD on 02 6391 3025 or CERD@dpc.nsw.gov.au.



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INTRODUCTION

The Central Orana Regional Economic Development Strategy (Strategy) was developed to identify economic development opportunities that capitalise on its functional economic region. The Central Orana Region Functional Economic Region (Central Orana or the Region) comprises the Dubbo Regional and Narromine Shire Local Government Areas. Dubbo is the main economic centre of the Region and is a successful regional urban centre as a transport crossroad in western New South Wales.

The Region is renowned for its many natural and heritage tourism destinations. It also has a diverse economy with almost 6,000 businesses; manufacturing, agriculture and health care are the most important industries of the Region, while mining is growing rapidly. By continuing to capitalise on the Region's location as a significant natural endowment by promoting strong community cohesion, and a pro-business environment, it will continue to be a place that people seek out for investment, recreation, education, and care. By investing in transport infrastructure, the competitive potential of the Central Orana's strategic location can be harnessed to a greater extent, supporting the Warehousing, Postal & Freight sector, which can assist growth in the Manufacturing and Agriculture sectors by opening up export markets; as well as developing the local Food and Accommodation sectors by improving inward access to Tourists. These sectors can be further supported by taking full advantage of the Region's natural features which provide the basis for agricultural, mining, and tourism.

Long term population and economic growth can be specifically supported by providing a desirable and competitive standard of living, embodied by improvements in health care facilities and services, and the available education opportunities that entice new residents and businesses. Combined, economic development and an improving standard of living will help to retain the younger workforce in the Region by providing them with the jobs they need and lifestyle they desire, contributing to a stable community with sustainable prospects of long-term development.

This Strategy aims to:

- Establish Central Orana as an Agricultural Research Centre of Excellence to underpin the Region's strength in the agricultural sector.
- Develop the Logistics cluster to accompany anticipated growth in export-oriented sectors
- Establish Central Orana as an effective and interconnected Business Destination
- Capitalise on the growth potential of the Mining and Construction sectors to boost related clusters in Energy, Manufacturing and Transportation
- Develop a mature and diversified tourism sector

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

This Strategy is the culmination of data analysis along with collaboration between the Dubbo Regional and Narromine Shire Councils, and consultation with the local business community, and Balmoral Group Australia Pty Ltd.

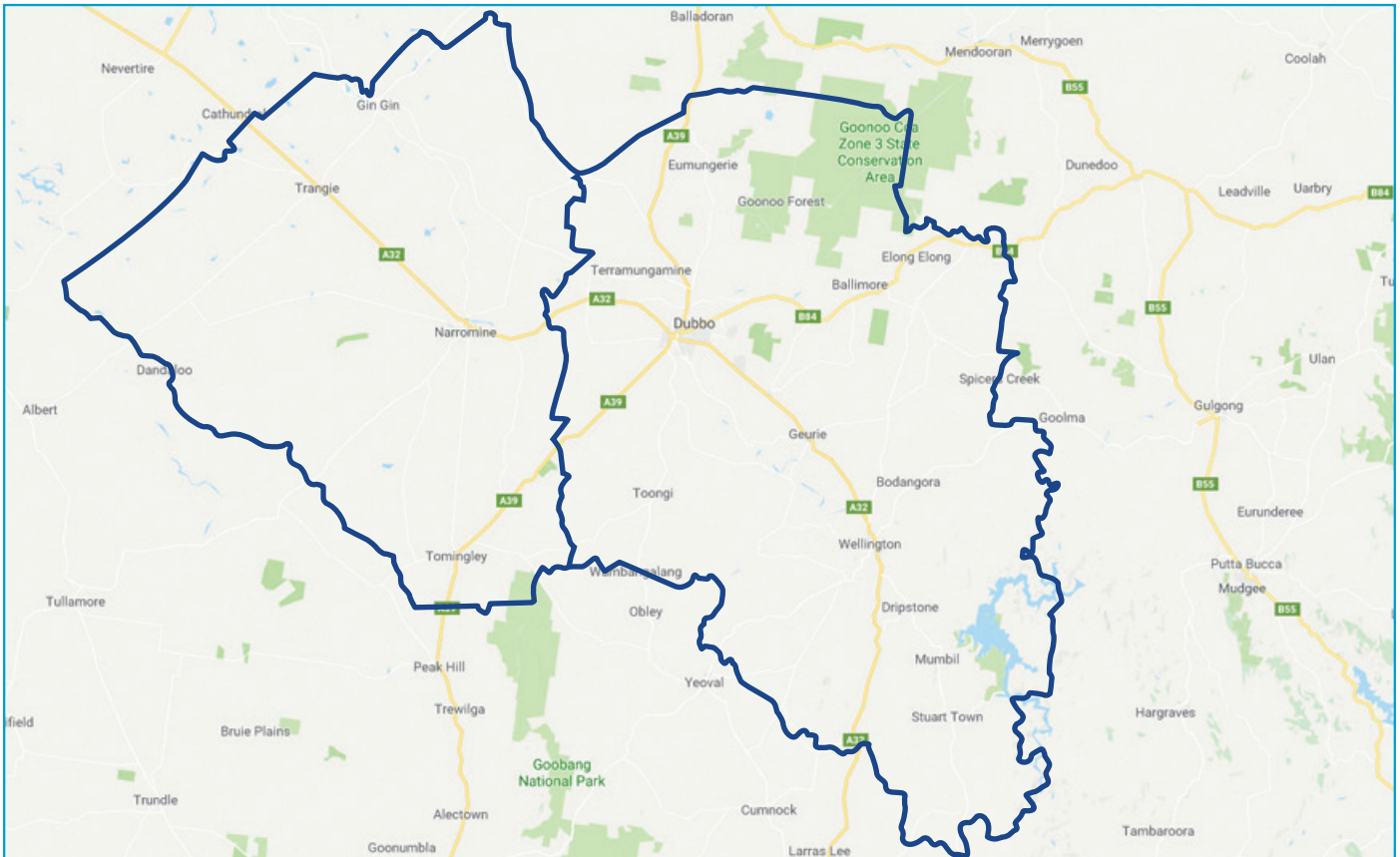
The Strategy's development process successfully identified several core strategies to achieve a prosperous economic future. For each strategy, primary action steps and infrastructure priorities have been identified, as well as appropriate implementing parties for lead, support and stakeholder roles. A concerted focus and effort will be required to achieve all of the intended outcomes for the strategy. At the same time, considerable vetting of each aspect of the recommended strategies has determined that the strategies are viable, compatible with available resources, and promising opportunities to leverage Central Orana's demonstrable economic strengths and specialisations.

BACKGROUND

The Region comprises the Dubbo Regional and Narromine Local Government Areas (LGA) as shown in Figure 1. Dubbo is the largest population centre followed by Narromine and Wellington. Approximately 93% of workers in the Region are also residents, indicating the Central Orana's relative self containment.

Figure 1: Central Orana Functional Economic Region

Source: NSW Government Spatial Services and Open Street Maps



The NSW Department of Planning and Environment (DPE) produced population projection figures to 2036 by LGA. The low, main, and high population projection estimates for the Region are depicted in Figure 2. In 2016 the Region's population was 56,521 a 5% increase from 2011. Between 2016 and 2021, the population of Central Orana is expected to grow 2% (to 58,000) under the low estimate, to as high as 4% (to 60,450) under the high estimate. By 2036, Central Orana's population is expected to grow by 8.6% (to 62,800) under the main growth estimate.

As of the 2016 Census of Population and Housing, the median age in Central Orana was 39, marginally higher than that of NSW (38). However, while the Region possesses a higher percentage of people aged 0-19 years old, NSW has a higher ratio of people aged 20-54; this may be indicative of the working age population leaving Central Orana to find employment opportunities at all levels. In comparison to NSW, the Region has slightly more Lone Person Households, One parent families and couple family with no children and has less couples with family with children and group households as a percentage.

BACKGROUND CONTINUED

Figure 2: Central Orana Population Projections

Source: NSW Department of Planning and Environment (DPE)

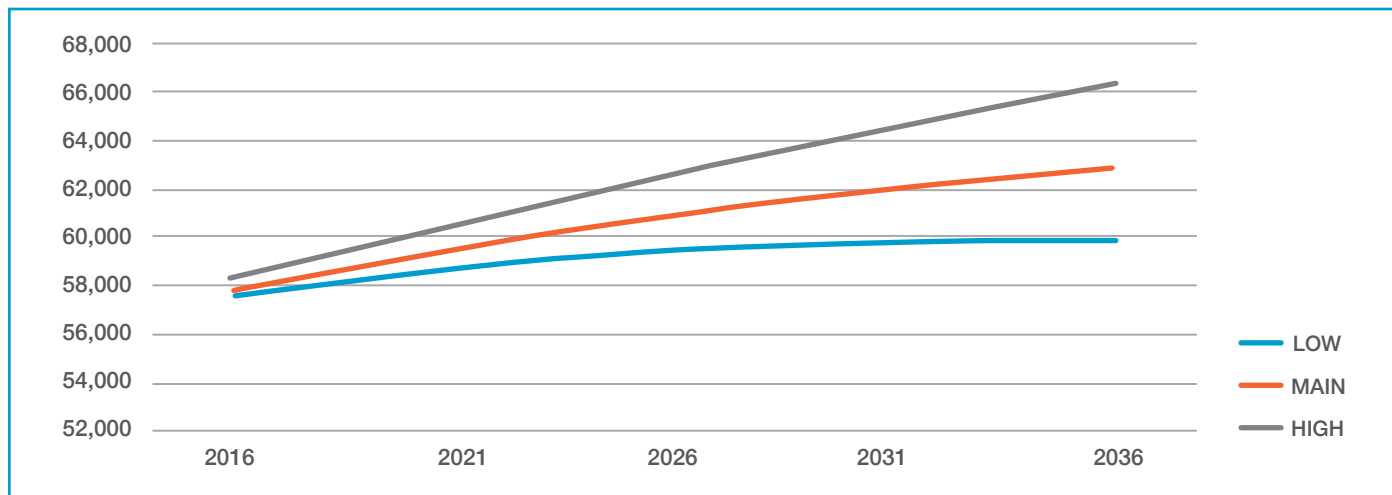
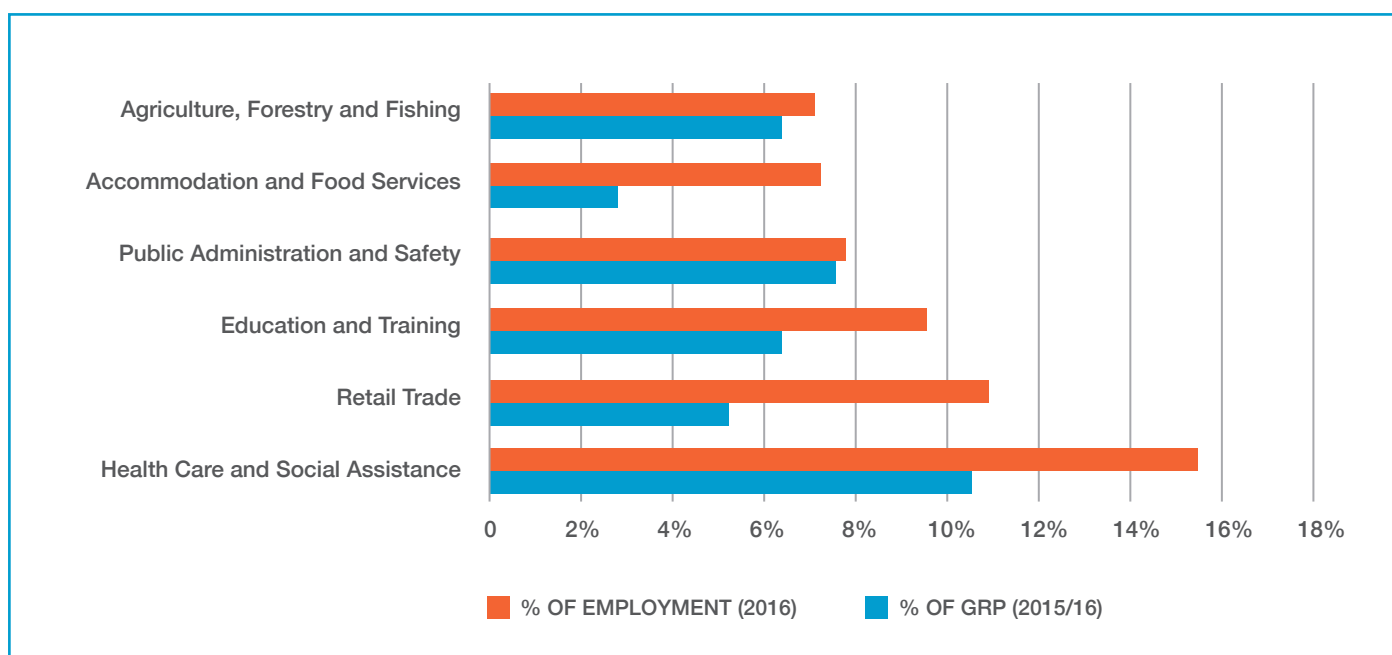


Figure 3 below, provides a snapshot of the Regional economy composition by employment and GRP. Generally, the share of GRP for the highest employing sectors is less than their share of employment, suggesting that GRP per capita in these sectors is less than the overall mean. Strategies that lead to value-adding into these industries are therefore likely to lead to benefits for a significant part of the workforce. Healthcare and social assistance is the largest employer by sector, providing the necessary services for an ageing population as well as highlighting Dubbo's importance to neighbouring LGAs as a provider of healthcare services through the Dubbo Base Hospital and allied facilities, which is underpinned largely by public sector investment. The sector has experienced continual growth since 2001, and in 2011-16 it grew 15.5% to a workforce of 3,719 people; with a location quotient of 1.24 it is a significant pillar of the local economy.

The Education and Training sector has similarly experienced continual growth in the Region growing 9.6% in 2011-16 to 2,290 people. With a location quotient of 1.15 it represents an important sector that provides the skills required not only in the local economy but in the greater Orana region as well. A more detailed analysis of the demographics, employment and macroeconomic trends represented by Central Orana's main industries are given below in the Endowments and Specialisations sections and in the accompanying *Central Orana Regional Economic Development Strategy – Supporting Analysis 2018-2022*.

Figure 3: Major Employment Sectors and Contribution to Gross Regional Product

Source: CERD and Balmoral Group Australia



ENDOWMENTS

Endowments are resources and strengths that a region and its economy possesses and capitalise on. Economic principles suggest that endowments play a key role in the economic development of regions. The CERD in its *Regional Economic Growth Enablers Report (2017)* found that:

*‘the future of individual regional economies is inexorably linked to their natural endowments and attempts to retain or establish industries without an underpinning endowment are unlikely to succeed’.*¹

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

Natural

Water – Macquarie River and Burrendong Dam

The Macquarie River is one of the main rivers in NSW and is an important resource as it travels through the main towns of Central Orana. The river provides 70% of the potable water in Dubbo and Wellington and is also a major endowment for agriculture, tourism and fishing. The Macquarie River is a source to the Burrendong Dam in Wellington, which acts as a flood mitigation plant, a water supplier for irrigation and a power generator for nearby communities. In addition to these sources of water, the Region’s mean rainfall ranges between 500 and 600 mm with up to 62 days of rain in a year. Annual temperatures range from mean minimum of 10°C and mean maximum of 25°C, according to the Australian Bureau of Meteorology.

Lachlan Orogen Resource Area

Central Orana is endowed with natural metal ore deposits used for construction materials as it is a part of the Lachlan Orogen geological formation. According to the Resources and Energy Department within the New South Wales Government, there is an opportunity for further, extensive excavation of these metal ore minerals. This is a potential asset for Central Orana as mining can be developed into a larger exporting industry and bring new wealth into the Region.

Geographic Location

Central Orana is located in close proximity to the geographic median of Sydney, Melbourne, Brisbane and Adelaide. With the pre-existing transport infrastructure noted in the ‘Physical Infrastructure’ section on the following page and the investments coming from the Inland rail, the Region has the potential to become a major freight/transport hub.

Institutional and Industry

Arts and Recreation Services

Heritage activities, zoological and botanical gardens operations and other recreational services are all considered as potential growth industries. Central Orana is well endowed with recreational and tourist attractions to bring visitors to the area. Attractions include: the Taronga Western Plains Zoo, Old Dubbo Gaol, Wellington Caves and the Dubbo Observatory. As this sector is further developed, other complementary industries such as Accommodation and Food Services and Retail Trade sectors may grow. Continued investment in tourism infrastructure, particularly in cultural tourism infrastructure which have lower seasonal influences, will provide anchors for year-round tourist visitation.

Mining

This industry is growing in Central Orana with a number of projects in initial stages. Evidence suggests there are further deposits that are yet to be developed. As activity in the mining sector expands, the Construction, Structural/Metals Manufacturing, Professional, Scientific and Technical Services and the Transportation sectors will likely experience elevated demand. In order to facilitate this growth in the mining sector and its related industries, a skilled workforce must be resourced, either by attracting skilled workers from outside the Region, or by training or reskilling the current workforce.

Human Capital

The Central Orana population is relatively evenly distributed across age groups with a skew towards family units and a higher fertility rate than the State average. This suggests that the Region has a balanced workforce that can continue to sustainably support industry over the medium-term. However, forecasts show an ageing trend in the population of Central Orana. Based on survey responses and interviews, Central Orana is lacking on availability of skilled workers. 59% of survey respondents ranked this item as poor or very poor in the Region. Free-responses throughout the survey provided further insights on this vulnerability in Central Orana.

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

ENDOWMENTS CONTINUED

Physical Infrastructure

The Region is endowed with major road and air infrastructure. Newell Highway is the most advantageous road infrastructure. It runs directly through Dubbo Regional LGA at a point that is equal distance from Wellington and Narromine and is a direct link to Melbourne and Brisbane. This is a major asset for transporting the Region's agricultural goods to markets and also allows easier visitor access. Additionally, Dubbo City Regional Airport is the largest in Central Orana in terms of passenger number and is a central refuelling and connection point for the Region.

Institutional Audit

Table 1, below, summaries the underlying institutions that are important for Central Orana's economic future. They have been identified as key factors for the implementation of the strategies detailed in this document. Detailed descriptions of them and their roles in the Region are supplied in the *accompanying Central Orana Regional Economic Development Strategy – Supporting Analysis 2018-2022*.

Table 1: Institutional Audit

Source: Balmoral Group Australia

| Institution | Role in the Region |
|---|--|
| Dubbo Regional and Narromine Shire Councils | Local Government Bodies representing the Region. |
| NSW Department of Premier and Cabinet | The NSW Department of Premier and Cabinet (DPC) is a state organisation that leads the NSW public sector in fulfilling its commitments and priorities. |
| Dubbo Chamber of Commerce and Industry | Organisation that seeks to build a business network in Dubbo to facilitate business growth, increase job opportunities and represent businesses. |
| Orana RDA | Organisation responsible for promoting economic development in the Orana Region. |
| NSW Farmers Association | Association representing farmers' interests. |
| NSW Minerals Council | Represents the mining industry sector interests in NSW. |
| Charles Sturt University | Provides educational opportunities for Dubbo's workforce. |
| Dubbo Aboriginal Land Council | Branch of the NSW Aboriginal Land Council |
| Fletcher International Exports Pty. Ltd | Largest manufacturing company in Dubbo that employs more than 500 people. |
| Alkane Resources Ltd | Mining and exploration company. They are responsible for the Tomingley gold operations and the \$1 billion Dubbo Project. |
| TAFE Western | Dubbo and Wellington colleges provide training programs/opportunities in areas such as agriculture, construction, nursing, among others. |



SPECIALISATIONS

A simple form of analysis that can be used to gain an understanding of a region's competitive advantages² is the Location Quotient (LQ) which measures the employment concentration in industry sectors within a regional economy, compared with the same sectors across NSW³. The higher the LQ, the more specialised a region is in that industry relative to the rest of NSW⁴. For the purpose of this analysis, specialisations as defined by LQs, are in turn used as a proxy measure for those sectors and industries that represent a region's true competitive advantage.

Importantly, while LQs are used in this document for that purpose, they are only a partial measure of those competitive advantages. Hence, they have been considered alongside additional qualitative evaluations and data analysis, such as Input-Output analysis, to arrive at the findings for the Central Orana Strategy.

Agriculture, Forestry and Fishing

Employment in the Agriculture, Forestry and Fishing industry is highly variable, with the sector employing 1,714 people in 2016 after falling to a low of 1,622 in 2011 from 2,382 in 2001. These broad employment patterns have been driven by an increase in employment in the Specialised Beef and Sheep Farming Sectors and a shift away from mixed Grains-Cattle enterprises.

Despite being the Region's 6th largest employer it has the second largest share of total output, totalling \$443.5 million worth of goods and services consumed within the Region, and \$221.8 million exported. This suggests that the agricultural supply chain is well concentrated in Central Orana, with value-adding in other industries in the region taking many of the sector's products.

Continued specialization in the Agriculture sectors can benefit from synergies with Trangie's Agricultural Research Centre, which has a long history of research in sheep and beef genetics, particularly Merino sheep and Angus beef.

2. A region's competitive advantage for an industry includes its ability to produce goods and services at a lower cost or differentiate its product from other regions, along with access to external factors which enhance business and operations/minimize risk (Stimson, Stough and Roberts, 2006)
3. For further details on Location, please refer to the "Location Quotients" section of the Supporting Analysis:

Mining

Mining is growing rapidly in the Region as most projects are in their initial stages, contributing to the rapid growth of the Construction sector over the past 10 years. In 2015-16 the Mining, Exploration and Mining Support Services Sector consumed \$15.7 million of intermediate inputs within Central Orana. Out of this, \$2.8 million came from the Professional, Scientific and Technical Services sector, suggesting that mining is reliant upon access to skilled labour for future growth.

In 2016, Gold Ore Mining had most of the employment of the mining industry. Open cut mining at the Tomingley Gold mine is expected to continue until late 2018; a mining study has determined that further deposits (mineral resources and ore reserves) "can be viably mined using standard long hole stoping with rib pillars and long hole stoping using cemented rock fill"⁵.

The most important mining project for Central Orana over the coming years will be Alkanes Resources Ltd Dubbo Project, a \$1 billion project that seeks to mine rare metals like zirconium, hafnium, niobium and yttrium. Alkanes Resources Ltd estimates that construction will be during 2018-19 with a lifespan of at least 70 years. As a share of employment in the Region, mining is a small but rapidly growing sector increasing from 40 jobs in 2001 to 226 in 2016. Employment in Mining and its cluster could experience further growth as the pipeline of developments mentioned above, and others, come online in the near future.

4. An LQ of 1.25 is identified in the literature as denoting a regional specialisation.
5. Alkanes Resources Ltd (2018), Tomingley Underground Resource, Reserve & Development, ASX and Media Release, 4 June, Alkanes Resources Ltd., viewed 13 June 2018, < https://alk.irmau.com/site/PDF/1972_0/TomingleyUndergroundResourceReserveandDevelopment >



Manufacturing

The Manufacturing sector has the largest share of Central Orana's total output, despite only being the 8th largest employer, sitting at 1,348 people in 2016. Due to factors including replacement of labour by capital, the number of people employed in the sector has seen a gradual decrease over the 2001-2016 period. However, the percentage decrease in employment for the Manufacturing sector inside the Region was less significant than that of NSW as a whole.

Although Manufacturing itself is not a specialisation of Central Orana, some sub-sectors inside Manufacturing possess LQs of above 1.25. These include Meat and Meat Product Manufacturing (LQ of 4.45), Other Food Product Manufacturing (2.21), Grain Mill and Cereal Product Manufacturing (1.98), Bakery Product Manufacturing (1.42) and Structural Metal Product Manufacturing (1.86). On top of having high LQs, the 'food-related' sub-sectors listed above also showed growth in absolute employment from 2011 to 2016; this reflects favourable conditions with respect to the supply of raw agricultural materials and access to consumer markets due to the Region's location.

As a sector, Manufacturing sources most of its inputs from within the Region, consuming a total of \$490.7 million worth of goods and services internally and \$115.5 million imported. It is a significant exporter for the Region, contributing to \$379.8 million of consumption within Central Orana, and exporting \$266.6 million in 2015-16. The largest subsector was Meat and Meat Product Manufacturing, which exported \$134.2 million, representing a significant value-add for the Agriculture product supply chain.

The improving strength and reliability of these factors has seen the location quotient of this sector rise in competitiveness from 0.68 in 2011 to 0.96 in 2016. As market access improves, embodied by synergies with the Transport, Postal and Warehousing sector, the LQ for the Manufacturing sector can be expected to exceed 1.25 in the future. An example of this cross-sector relationship is given by Fletcher International Inc., a large exporter of lamb and sheep meat that has its own intermodal facility and trains for transportation, which allows it to be more effective in distributing goods to market.

Transport, Postal and Warehousing

Central Orana's strategic location in regional NSW gives good access to road, air and rail transport, at a convenient point between Melbourne, Sydney and Brisbane. Access to these forms of transport is not readily available to many other regions and is a considerable endowment to Central Orana and its major industries. Freight transportation is mostly by road, and Central Orana has direct access to the Mitchell, Golden and Newell Highways. The Transport, Postal and Warehousing sector provided \$92.4 million worth of goods and services within the Region and \$59.2 million of exports in 2015-16. Of these, Road Transport and Transport Support and Storage were the largest contributors to economic activity. The sector provided \$12.2, \$0.5, and \$21.3 million dollars' worth of inputs into the Agriculture, Mining and Manufacturing industries respectively in 2015-16.

Despite being an integral sector to the economic function of Central Orana and neighbouring regions, employment has remained fairly stable, sitting at 944 people in 2016. The sector's Location Quotient is also only 0.84, suggesting that it is not yet a significant hub for freight forwarding or transport for the whole of NSW. Given the significant existing transport endowments and anticipated growths in the Agriculture, Forestry and Fishing, Mining and Manufacturing industries, and investment in the inland rail project, this sector can be expected to grow in the future and emerge as an economic specialisation in its own right provided the necessary support.

Tourism

Central Orana is recognized for its eco-tourism attractions and gliding events. Taronga Western Plains Zoo is the biggest attraction in the Region, attracting 228,092 paid admissions in 2016-17. Other known attractions are Wellington Caves, Lake Burrendong, Old Dubbo Gaol and heritage gardens. Narromine is an internationally regarded gliding centre and since 2012 Narromine airport has hosted the Two Seat National Gliding Championship.

Tourism employs 11% of Full-time equivalent jobs in Central Orana (CERD I/O 2016). In the accommodation and food services, and retail trade sectors (two of the top five employers in the Region), tourism accounts for 65% and 24% of jobs, respectively. Employment in Accommodation and Food Services has been buoyed in the five years to 2016, jumping to 1,738 from 1,483 after a period of relative stagnation. This was underpinned by an 18.6% increase in Cafes, Restaurants, and Takeaway Food Services and a modest 3.9% increase in Accommodation, suggesting that value growth in the sector as a whole is being driven by an increase in demand for food and drink but not a commensurate increase in the demand for tourist beds.

SPECIALISATIONS CONTINUED

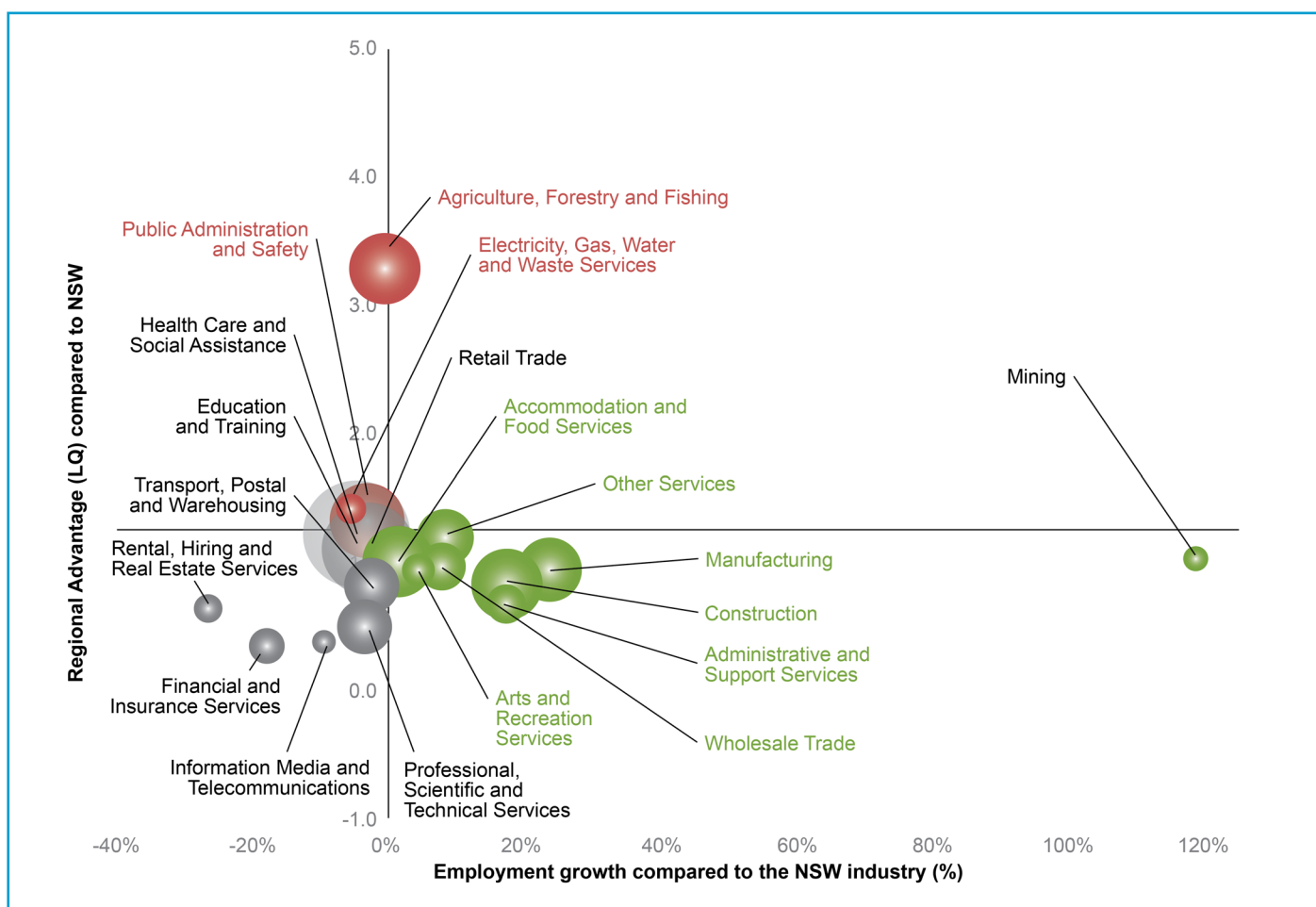
Figure 4 charts industries in Central Orana at the Australian and New Zealand Industry Classification (ANZIC) level 1:

- Industries with a larger 'bubble' employed more people at the time of the 2016 Census
- Industries further above the horizontal axis are more specialised when compared to regional NSW, industries below the axis are less specialised when compared to regional NSW.
- Industries to the right of the vertical line grew faster between 2011 and 2016 (in terms of employment) than comparable industries across NSW.

Agriculture is the largest industry within Central Orana, while mining has experienced the fastest employment growth (in %, compared to NSW).

Figure 4: Major Employment Sectors 2016 (ANZSIC L1)

Source: CERD and Balmoral Group Australia



STRATEGY

The Strategy intends to build upon and enhance the opportunities presented by the Region's endowments, demonstrable economic strengths and specialisations. It is a product of economic data analysis and inputs from community consultation that also aims to address some of the key risks identified in the Region.

The five elements to the Strategy are given below in order of relative importance, determined through identification of existing council priorities, linkages with ongoing infrastructure projects and the extent to which each item is immediately actionable by council, Business Chamber and other relevant institutions.

Each element is accompanied by a set of early actions, which should be interpreted simply as example actions derived from the preliminary application of the Strategy framework. It is therefore expected that there will be other actions capable of contributing to the attainment of the Region's vision that are yet to be identified. Consequently, an action's alignment with the Strategy is the primary strategic consideration, rather than it being listed in this document, and all proposed actions will be subject to further qualitative and quantitative evaluative processes.

The Five Elements of the Strategies

| | |
|---|---|
| 1 | Establish Central Orana as a Centre of Excellence for Agricultural Research to underpin the Region's strengths in the Agricultural sector Establish Central Orana as a centre of excellence for agricultural research, including the development of water focused research |
| 2 | Develop the Logistics cluster to accompany the anticipated growth in export-oriented sectors Establish a functioning intermodal logistics hub servicing the western catchment area and providing access to the eastern seaboard markets |
| 3 | Establish Central Orana as an effective and interconnected business destination Increased number of businesses and workers and increased business retention |
| 4 | Capitalise on the growth potential of the Mining and Construction sectors to boost related clusters in Energy, Manufacturing, and Transportation Develop a healthy marketplace for agriculture, manufacturing, mining, transportation and logistics businesses to increase employment, output and revenue in each of these industries |
| 5 | Develop a mature and diversified Tourism sector A fully developed tourism experience utilising the existing endowments of the Region |

1 | Establish Central Orana as a Centre of Excellence for Agricultural Research to Underpin the Region's Strengths in the Agricultural Sector

Agriculture is one of the main industries in the Region, constituting nearly 30% of the registered businesses and providing more than 2,000 full-time equivalent jobs. Taking advantage of existing agricultural research facilities such as Trangie's Agricultural Research Centre (TARC) and the Charles Sturt University supports the sector not only in the local economy but across regional NSW as a whole. Extensive research in partnership with producers will increase innovation and provide new cost saving or value adding processes to the agriculture industry.

Early Stage Infrastructure Priorities

The goal of increasing agricultural productivity and profitability is hindered by the lack of adequate telecommunications infrastructure. Investment in technologies that expand internet and mobile services throughout the Region will allow farmers and agronomists to have access to online information exchanges as well as take advantage of technologies that require internet access. The provision of these services will also allow more of these internet dependent tools to be developed in Central Orana, offering another avenue of potential growth and value-add.

The provision of overtaking lanes between Dubbo and Narromine on the Mitchell Highway has been identified as a priority to developing Central Orana as an Agricultural Centre of Excellence as this road is the major point of traffic to the TARC. Furthermore, as research continues to progress and expand, research facilities will require the continuing support for future maintenance and growth.

Organisational Priorities

While research is a fundamental part of this exercise, the distribution of technology and advancements in best practise is equally important if theoretical improvements in productivity and quality are to be realised on farms. Cooperation between agricultural businesses, research centres and hubs, educators, and government institutions such as the Local Land Service will ensure that research is calibrated to the industry's needs. Identifying these stakeholders and forming a communication network between them must be a priority. Their collaboration is critical to the formation and success of this strategy.

Central Orana is endowed with water bodies that are important suppliers not only for users in the Region, but those downstream. As such, Central Orana has the opportunity to lead water focused research, which will enable Central Orana to optimise water allocation for agricultural activities, and other competing users. This research is very important to existing industries like mining and agriculture all over New South Wales, especially as recent droughts have negatively impacted these industries.

Goal Outcome

Establish Central Orana as a centre of excellence for agricultural research

Intermediate Outcome

- Development of water focused agriculture research hub based at the Trangie Agricultural Research Centre
- Additional capital investment in agriculture, research and distribution facilities

Outputs

- Partnership program between TARC, local education facilities and farmer in the community
- Improved distribution and logistics networks for producers

Activities

- Facilitate research partnerships between industry, educators and government representatives
- Support the development of a water focused Agriculture Research Hub through capital investment in telecommunications infrastructure
- Upgrade the Dubbo Regional Livestock Market Rail Crossing
- Conduct road maintenance and expansion between Narromine, Dubbo, and Wellington.

Inputs

- Coordinate with key actors within the agricultural and academic communities
- Coordinate with Charles Sturt University to identify research strengths and programs to be implemented in the region

2 | Develop the Logistics cluster to accompany the anticipated growth in export-oriented sectors

While the Transport, Postal and Warehousing sector is currently not a specialisation in the region, Central Orana's strategic location (between Melbourne and Brisbane and between Sydney and Adelaide) and the variety of transport method it offers makes it an ideal location to develop a logistics hub. A successful development of a logistics hub will allow the region to meet the increased demand arising from both the anticipated growth of the Agriculture, Forestry and Fishing, Mining and Manufacturing sectors and the Inland Rail Project in the near future.

Early Stage Infrastructure Priorities

Making the Region a logistics hub will require transport infrastructure upgrades to meet future traffic demands. These include upgrades to the Dubbo City Regional Airport, the provision of overtaking lanes between Narromine, Dubbo and Wellington, and the development of the heavy vehicle freightways. During and after the construction of the Inland Rail Project, traffic through regional centres around Narromine will increase; therefore, investment in supporting infrastructure including truck stops, maintenance facilities and refuelling stations should be seen as a priority.

Central Orana's natural endowment as a centrally located region with a skilled manufacturing workforce makes it an ideal place for transport and logistics investment. For example, the development of the Regional Fleet Maintenance Facility in Dubbo will bring long-term economic activity to the Region. As transport maintenance becomes a more important sub-sector of the economy it will be important to ensure that the workforce and skills are present to support it in the future.

Better communications infrastructure is crucial for improving efficiency during the distribution process. As the Region continues to emerge as a critical logistics hub, coordination between existing and developing intermodal facilities will be of utmost importance.

Organisational Priorities

Increasing the efficient use of existing infrastructure should be an immediately actionable priority for Central Orana, allowing it to maximise its potential as a regional logistics hub. For instance, removing barriers to, and increasing cooperation between freight forwarding businesses to ensure that trains are used to their full capacity, whether importing or exporting goods. This will allow businesses to take advantage of economies of scale. As use of the existing network increases, infrastructure upgrades may be needed at some point to support future growth.

Establishing a logistics hub requires identifying and developing storage and distribution areas. This may require the expansion of an existing intermodal facility such as the ones in Dubbo and Narromine, or it could be the establishment of a new facility to expedite the movement of goods through the Region. Either way, constant communication between councils and businesses will be crucial to establish a well-functioning intermodal facility.

Goal Outcome

Establish a functioning intermodal logistics hub servicing the western catchment area and providing access to the eastern seaboard markets

Intermediate Outcome

- Additional capital investment in product processing/distribution and logistics management.
- New entrants to logistics sector
- Improved utilisation of existing transport/distribution networks

Outputs

- Central Orana becomes a best practise logistics hub due to proximity to rail manufacturing and maintenance facilities, its central location to Melbourne, Sydney and Brisbane, and location as a hub for the Western NSW Region

Activities

- Develop an intermodal processing and storage facility
- Develop a concise marketing strategy for an intermodal logistics hub in the Central Orana region
- Establish a network of producers with logistic synergies
- Invest in the delivery of transport linkages in and around the Region
- Invest in delivery of supporting transport infrastructure including truck stops, maintenance facilities and fuelling stations

Inputs

- Coordinate with key actors in the freight transport industry
- Coordinate with producers utilising the Region's logistics supply chain to anticipate future demand.
- Conduct a feasibility and concept design for an intermodal facility

3 | Establish Central Orana as an effective and interconnected business destination

Despite Dubbo's status as a major inland regional growth centre, business owners participating in the online survey or phone interviews reported that the business environment in Central Orana needed improvement. For Central Orana to increase its appeal as a favourable business destination, the Region will have to conduct improvements to physical inputs (such as electricity and communication) and become a 'Smart City', while increasing support from local government/the general business community and improving access to skilled labour. The proposed infrastructure improvements, along with the actions proposed in the previous strategy, will set a basis for the 'Silicon Plains' with high-standard transport links, land availability and telecommunication systems.

Early Stage Infrastructure Priorities

Encouraging new and existing businesses in the Region to establish and expand, and making the Central Orana an attractive place to live and work for skilled people requires delivering essential services to the business community. These include upgrades to internet and telecommunication services, improved road network, upgrades to the Dubbo City Regional Airport, and improved spaces for networking and events. As the Region's population grows, government must ensure that adequate residential land is zoned, serviced by utilities, and appropriate houses are built.

Investment in business-supporting infrastructure should ideally be targeted at projects that build on local strengths and endowments. For example, the development of the Narromine Aerodrome Industrial Park capitalises on the naturally occurring thermals, local expertise, and the significant cultural capital associated with international recognition. As an industrial, residential, and tourism development it demonstrates how individual projects can contribute to diversifying the economy. Investment in enabling infrastructure, such as roads and utilities, and streamlined regulatory processes will allow businesses to take advantage of local economic specialisations & endowments in similar developments. The Dubbo City Regional Commercial Precinct has also been identified as a possible project which targets local economic specialisations and endowments.

Organisational Priorities

Initiatives that address the goal of making Central Orana an attractive place to live, work, and do business are currently actioned through programs such as Evocities, and the RDA's Love the Life We Live. Continued support and funding for these is an imperative step in ensuring that gaps in the labour market are closed. In order to ensure that the comparative advantage of the Region's lifestyle continue to attract and retain skilled labour, essential services must continue to be delivered, including education, healthcare, affordable housing, public transport, recreational activities, and law and order. The presence of a strong aged care and social assistance industry is an endowment that improves the image of the Region as a community that has the ability to meet a person's needs throughout their life, making it more likely that they will choose to stay in the area over the long term. Supporting this industry is therefore a priority for sustainable economic development.

To foster a healthy economy, business support is needed to retain and promote local businesses, and to attract business investment from outside Central Orana. As noted previously in the report, addressing communication barriers between local government and businesses represents a simple but significant opportunity to improve the business environment. Many business owners are not aware of the paperwork or processes required to seek assistance, the funding opportunities available, or of what other businesses are doing to coordinate mutually beneficial activities.

Local government has a role in designating resources to revisit local zoning, streamlining regulatory processes and establishing an information "hub" so that there is a friendlier, less time consuming business environment. Effective programs such as business mentoring, facilitating businesses co-working and incubator and share spaces, establishing a business ombudsman that advocates for businesses and proper marketing of these opportunities supports the goal of encouraging business growth and activity. Although businesses, many business stakeholders reported some kind of innovation in the past year, these actions will improve this outcome. Engaging business and related discipline graduates from CSU in these initiatives can lead to long-term skill retention in the Region as they use their skills to start and build their careers locally.

Goal Outcome

Businesses invest in growth opportunities and skilled workers find employment opportunities in the Region

Intermediate Outcome

- Increased employment, number of businesses and business retention
- Increased interaction between existing and new business community
- Clearly defined and easily accessible information (and guidance) on available grants, funding and approvals process

Outputs

- Raised awareness among businesses of funding, mentoring programs and training opportunities
- Regularly scheduled information-sharing events
- Formation of a Central Orana Business Innovation Directorate
- Streamlined business processes

Activities

- Set up an 'information hub' website giving information on grants/funding available for businesses
- Provide shared spaces programs
- Infrastructure upgrades, targeting local economic specialisations and endowments

Inputs

- Coordinate with leaders in the business community
- Resource funding for infrastructure upgrades that support business growth.
- Resource facilities and staff for shared spaces programs and information hubs.

4 | Capitalise on the growth potential of the Mining and Construction sectors to boost related clusters in Energy, Manufacturing, and Transportation

Over the 2011-2016 period, the Mining sector in Central Orana grew at a faster pace (as a percentage) than New South Wales. With this, the local Construction sector has also expanded significantly. Although the open cut mining at Tomingley Gold mine is expected to be completed in the September quarter of 2018, employment in the Mining sector is expected to increase from a number of opportunities. One such opportunity includes the Alkanes Resources Ltd Dubbo project, which is a billion-dollar rare metals project with an expected lifespan of at least 70 years. Along with current and expected projects, continued mineral exploration will ensure that the mining industry has the scope to continue to expand and bring skilled workers and high paying jobs into the Region. Growth in the mining industry will also present flow-on growth opportunities to other sectors such as manufacturing, energy, and transportation & logistics.

Early Stage Infrastructure Priorities

Multiple renewable energy projects throughout Central Orana are in various stages of feasibility exploration, approval, construction, and operation. These include solar farm opportunities near Dubbo and Narromine and wind farm developments near Wellington. Supporting renewable energy projects will provide a broad economic base for the construction and manufacturing industry to continue to grow. Where possible projects should incorporate small-scale co-generation measures in the design.

While competition for skilled labour in the construction sector remains tight due to high demand, the presence of a skilled and growing workforce presents opportunities for other sectors to access development, especially during periods of relatively low growth in the mining sector. Taking advantage of the increased workforce employed in the construction and manufacturing industry will allow for additional projects such as the redevelopment of Trangie Agricultural Research Centre, the upgrade of Dubbo Regional Livestock Market Rail Crossing, the development of intermodal freight facilities and The Inland Rail project to benefit the clusters that they serve.

Organisational Priorities

The existing manufacturing industry uses mined minerals for structural and metals production, pointing to potential growth and expansion of the sector as more raw materials become available for productive use within Central Orana. Supporting mineral exploration and high value manufacturing will stimulate new professional, scientific and technical employment opportunities in the Region. As the construction sector workforce expands to accommodate growth in demand for skilled labour, it will become important to establish a consistent pipeline of suitable projects to manage the fluctuations in mining activity over time. Government should therefore undertake to identify and fund feasibility studies into capital infrastructure projects that will be important for future economic growth beyond the timeframe of this Strategy.

Adequate training and educational programs, combined with business incentives to hire and train locally based staff, will be critical to meet the production needs of each industry, reduce any existing supply chain gaps and increase servicing of Orana Juvenile Justice Centre, Wellington Correctional Centre, Dubbo Hospital and aged care facilities.

Goal Outcome

The Region experiences increased employment, output in the Energy, Manufacturing and Transportation industries as economic activity in the Mining and Construction sectors flows through the economy.

Intermediate Outcome

- Excellent infrastructure in place to support growth in each cluster

Outputs

- Increased locally trained staff
- Increased servicing of and supply to the main industries in the region

Activities

- Provide training opportunities suited to the Region's needs
- Develop an incentive scheme to hire and train local staff
- Leverage increased activity in construction and the inland rail to provide growth supporting infrastructure in target industries
- Re-zone areas of the Region to industrial

Inputs

- Coordinate with industry to target needs-based skills training
- Resource the development of existing and potential infrastructure opportunities

5 | Develop a mature and diversified Tourism sector

Tourism is a key sector for the region. During the stakeholder engagement process, it was noted by stakeholders that many tourist destinations have adequate facilities or are going through a redevelopment process, but that these are not being fully utilised because of poor organisation and lack of awareness. Continuing to invest and improve the infrastructure taking advantage of Central Orana's significant endowments should be a consistent infrastructure priority. Furthermore, gaps in the availability of accommodation during peak seasons should be addressed to maximise value capture during these periods.

Early Stage Infrastructure Priorities

Transport infrastructure like Mitchell Highway and Burrendong Way will require upgrades and maintenance to support visitation to Central Orana.

Expansion of accommodation facilities is needed to service demand during peak season or during major events. This includes increasing motel capacity and increasing available spaces for carparks.

Ecotourism, natural adventure, and Indigenous attractions of the Region should be supported by government through the resourcing of adequate infrastructure where they are identified by the business community. This may involve providing utilities to campsites, or maintaining adequate signage along the Region's important highways.

Government should continue to support projects such development of the new Visitor Experience Centre at Wellington Caves or the refurbishment of the Old Dubbo Gaol in order to improve the overall tourism experience in the Region. As discussed in previous sections, the Narromine Aerodrome Industrial Park is an example of a development that successfully capitalises off the Region's significant endowments to deliver benefits across sectors of the economy.

Organisational Priorities

Central Orana is endowed with natural areas, water bodies, and cultural and heritage activities/opportunities that many visitors are not aware of. Providing tourism experience packages, increasing the frequency of the events and improving marketing of attractions in the Region will develop its reputation as a mature and high-value tourist destination. Funding for cultural tourism offerings, as supported through the Destination Network Country and Outback, is another priority for the region. Developing tourist packages requires consultation with event organisers, food and beverages producers, the accommodation sector, facilities owners and the councils to take advantage of mutually beneficial synergies between businesses.

As the Tourism industry strategy develops it will need to operate consistently with a concurrent business strategy, as outlined earlier in the report. As businesses expand to take advantage of the growing opportunities to market to visitors, the Region will need to ensure that they can seamlessly overcome any barriers to market entry, and integrate themselves within the existing tourism framework and business community.

Goal Outcome

A fully developed tourism experience utilising the existing endowments of the Region

Intermediate Outcome

- Increased tourism market in Central Orana, based on a diverse offering of aviation, gastronomical, agricultural, natural, adventure, and Indigenous products.

Outputs

- Raise awareness of Central Orana as a tourism destination and as a fly-in holiday
- Increased motel capacity and standards
- State branding strategy
- Regional Cooperative marketing support

Activities

- Encourage investment in higher accommodation capacity and standards
- Advocate for a State branding and regional cooperative marketing support strategy
- Support the development of a year round calendar of high yield events

Inputs

- Resource the development of underutilised endowments to fill gaps in the tourism marketplace
- Coordinate with events, locations and food businesses to develop packaged tours
- Resource infrastructure developments needed to support tourism growth

Table 2: Actions for Growth

| Enablers | Table 2: Actions for Growth | | | | |
|--|---|--|--|---|---|
| | Central Orana Agricultural Research Centre of Excellence to Underpin the Region's Strength in the Agricultural Sector | Develop the Logistics cluster to accompany the anticipated growth in export-oriented sectors | Establish Central Orana as an effective and interconnected business destination | Capitalise on the growth potential of the Mining and Construction sectors to boost related clusters in Energy, Manufacturing, Agriculture and Transportation | Develop a mature and diversified regional tourism sector |
| People and skills | <ul style="list-style-type: none"> ➤ Research partnerships between TRAC, educational institutions and agribusinesses | <ul style="list-style-type: none"> ➤ Establish a network of producers with logistic and product synergies | | <ul style="list-style-type: none"> ➤ Identify workforce training needs and provide additional training opportunities to increase local trained staff ➤ Develop incentive scheme to hire and train local workforce | <ul style="list-style-type: none"> ➤ Partnerships between businesses owners and organisation to create 'tour packages' |
| Government, regulation and information | | <ul style="list-style-type: none"> ➤ Feasibility design for an intermodal facility ➤ Coordinate with producers utilising the Region's logistics supply chain to anticipate future demand | <ul style="list-style-type: none"> ➤ Regularly scheduled information-sharing events ➤ Streamlined business processes ➤ Set up an information hub and raise awareness of available funding, mentoring programs and training opportunities | <ul style="list-style-type: none"> ➤ Development of education and recreation cluster groups to support infrastructure development ➤ Rezone land to industrial to allow businesses to expand. | <ul style="list-style-type: none"> ➤ Raise awareness of Central Orana as a tourism destination and as a fly-in holiday ➤ Encourage investment in higher accommodation capacity and standards. ➤ Advocate for a State Branding and Regional Cooperative marketing support strategy |
| Infrastructure | <ul style="list-style-type: none"> ➤ Capital investment on agriculture, research and distribution facilities ➤ Dubbo Regional Livestock Market Rail Crossing Upgrade ➤ Road maintenance and expansion between Narromine, Dubbo and Wellington ➤ Invest in telecommunications infrastructure to allow farmers to integrate new technology into their business. | <ul style="list-style-type: none"> ➤ Dubbo City Regional Airport Upgrade ➤ Dubbo Regional Livestock Market Rail Crossing Upgrade ➤ Road maintenance and expansion between Narromine, Dubbo and Wellington ➤ Invest in the delivery of transport linkages throughout the Region to support traffic to the Narromine intermodal, such as truck stops, maintenance facilities and refuelling stations. | <ul style="list-style-type: none"> ➤ Dubbo City Regional Airport Upgrade ➤ Road maintenance and expansion between Narromine, Dubbo and Wellington ➤ NBN or mobile technology and connectivity across the Region to be of a metropolitan standard ➤ Invest in infrastructure that targets local specialisation and endowments such as the Narromine Aerodrome Industrial Park and the Dubbo City Regional Commercial Precinct. | <ul style="list-style-type: none"> ➤ Road maintenance and expansion between Narromine, Dubbo and Wellington | <ul style="list-style-type: none"> ➤ Dubbo City Regional Airport Upgrade ➤ Old Dubbo Gaol Refurbishment ➤ Development of a Regional Sports Hub ➤ Narromine Aerodrome Industrial Park ➤ Development of the Wellington Caves Visitor Experience Centre |
| Utilities | | <ul style="list-style-type: none"> ➤ Water, electrical and stormwater upgrades at Dubbo City Regional Airport | <ul style="list-style-type: none"> ➤ Water, electrical and stormwater upgrades at Dubbo City Regional Airport | <ul style="list-style-type: none"> ➤ Encourage investment in renewable energy projects with small scale co-generation in design to feed into the local economy. | <ul style="list-style-type: none"> ➤ Water, electrical and stormwater upgrades at Dubbo City Regional Airport |

IMPLEMENTATION

This document sets out a vision for Central Orana as well as the strategies and actions that can enable it to achieve this vision. This Strategy was formed in collaboration with Dubbo Regional and Narromine Shire Councils, the business community and Balmoral Group Australia. The completion of this document is intended to be the first stage of an ongoing process where new specific actions to further progress towards the Vision are identified through application of the framework. Further detail about the strategy, actions, economy and endowments of the Region can be found in the *2018–2022 Central Orana Regional Economic Development Strategy Supporting Analysis*.

Regional Action Plan Implementation Review Process

This document includes strategies and actions that will be operated by the Dubbo Regional Council, the Narromine Shire Council, other organisations, as well as private businesses.

The Councils may wish to appoint an “Advisory Committee” comprising representatives of both Councils, other institutions and industry to monitor the progress of the Regional Action Plan and to apply the strategy’s framework to identify new actions to be added to the Action Plan. This “Advisory Committee” will meet quarterly to track the progress of actions identified in the Action Plan.

After two years, the “Advisory Committee” will conduct a formal review of the Action Plan and produce a brief report card to be published as an addendum to the Economic Development Strategy. This will also provide an opportunity to update the Action Plan for new or modified actions.

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



| Strategy | Task | Council | Business Chamber | Educational Institutions | Other |
|--|--|---------|------------------|-----------------------------------|---------------------------------------|
| Central Orana Agricultural Research Centre of Excellence | Coordinate with Charles Sturt University and key actors within the agricultural and academic community to identify research strengths and programs | | | Charles Sturt University; support | Agriculture business community ; Lead |
| | Facilitate research partnerships between industry, educators, and government representatives | | Lead | Support | |
| | Support of proposed water focused Agriculture Research Hub through capital investment in telecommunications infrastructure | Lead | | | Support |
| | Conduct Road maintenance and expansion between Narromine, Dubbo, and Wellington | Lead | | | |
| | Improve distribution and logistics networks for producers by upgrading roads and the Dubbo Regional Livestock Market Rail Crossing | Lead | | | |
| Develop the Logistics cluster to accompany the anticipated growth in export-oriented sectors | Conduct a feasibility and concept design for the development of an intermodal facility | Lead | | | Support |
| | Coordinate with producers utilising the Region's logistics supply chain to anticipate future demand | Lead | Support | | Support |
| | Coordinate with key actors in the freight transport industry to establish an integrated network of producers with logistic synergies | Lead | Support | | |
| | Invest in the delivery of transport linkages around the Narromine intermodal to facilitate transport through the Region | Lead | | | Co-lead |
| | Invest in the delivery of supporting transport infrastructure such as truck stops, maintenance facilities and fuelling stations | Support | Support | | Businesses; Lead |
| | Upgrade the Dubbo City Regional Airport to facilitate the development of an air freight economy | Lead | | | |
| Establish Central Orana as an effective and interconnected Business Destination | Coordinate with key business contacts and delegates to develop a healthy business ecology | Support | Lead | | |
| | Resource facilities and staff for shared spaces programs and an online information hub | Lead | Co-Lead | | |
| | Develop and provide shared places for businesses to interact and encourage innovation | Lead | Co-lead | | |
| | Set up an online hub that provides information on grants, funding, and business networking events | Lead | Support | | |
| | Resource funding for infrastructure upgrades that support business growth | Lead | Co-lead | | |
| | Support delivery of infrastructure upgrades, targeting local economic specialisations and endowments such as the Narromine Aerodrome Industrial Park and the Dubbo City Regional Commercial Precinct | Lead | Co-lead | | Support |
| | Streamline government regulatory process for business to encourage investment | Lead | | | |

| Strategy | Task | Council | Business Chamber | Educational Institutions | Other |
|---|--|---------|------------------|--------------------------|---------|
| Capitalise on the growth potential of the Mining and Construction sectors to boost related clusters in Energy, Manufacturing and Transportation | Resource the development of existing and potential infrastructure opportunities that capitalise on the Region's strengths in mining, construction, and manufacturing | Lead | Support | | |
| | Coordinate with industry to target needs-based skills training and develop incentives to hire and train the local workforce | Co-Lead | Co-lead | Support | |
| | Coordinate with education institutions to provide training opportunities to the local workforce | Co-lead | Support | Co-lead | |
| | Leverage increased activity in construction and the inland rail to provide growth supporting infrastructure to target industries | Lead | Support | | Lead |
| | Re-zone areas of the Region to industrial as the needs of industry increase | Lead | | | |
| Develop mature and diversified regional tourism sector | Resource the development of underutilised endowments to fill gaps in the tourism marketplace, such as the proposed Wellington Caves Visitor Experience Centre | Lead | | | Support |
| | Coordinate with events, locations, and food businesses to develop packaged tours | Support | Lead | | Support |
| | Resource the infrastructure developments needed to support tourism growth, such as the Narramine Aerodrome Industrial Park and the Taronga Western Plains Zoo | Lead | Support | | Lead |
| | Support the development of a year round calendar of high yield events | Support | Lead | | Support |
| | Advocate for a State branding and regional cooperative marketing support strategy | Lead | Lead | | Support |
| | Encourage investment in higher accommodation capacity and standards | Support | Support | | Lead |

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