

Preparing for Prosperity

*Snowy Valleys Council Region
Economic Development Strategy, 2018-2022*



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Acknowledgement of Country

We acknowledge the Traditional Owners and custodians of the land within the Snowy Valleys Council local government area and we pay respect to their Elders past, present and future.

Disclaimer

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Executive Summary

A Blueprint for Prosperity

The Snowy Valleys Council (SVC) region, located in the western foothills of the Snowy Mountains and bordered by the Kosciuszko National Park and Murray River, covers 8,960 square kilometres. With a population of 14,395, the Snowy Valleys is home to 5,895 jobs.

Preparing for Prosperity: Snowy Valleys Council Region Economic Development Strategy, 2018-2022, is a blueprint for enhancing the vibrancy, diversity and sustainability of the Snowy Valley Council region's economy and its influence on the liveability of the local government area as a whole. The Strategy has been prepared to support the communities of the Snowy Valleys Council area in accordance with Council's vision of "leading, engaging and supporting strong and vibrant communities".

Preparing for Prosperity articulates Council's role in facilitating, supporting and promoting business activity to develop and secure a sustainable employment base and a strong economic future for the Snowy Valleys Council area. Informed by targeted stakeholder consultation, research and analysis, it builds on the community engagement process undertaken by Council to prepare the *Snowy Valleys Community Strategic Plan: Snowy Valleys 2028: Our Vision, Our Future*.

Capitalising on Competitive Advantage

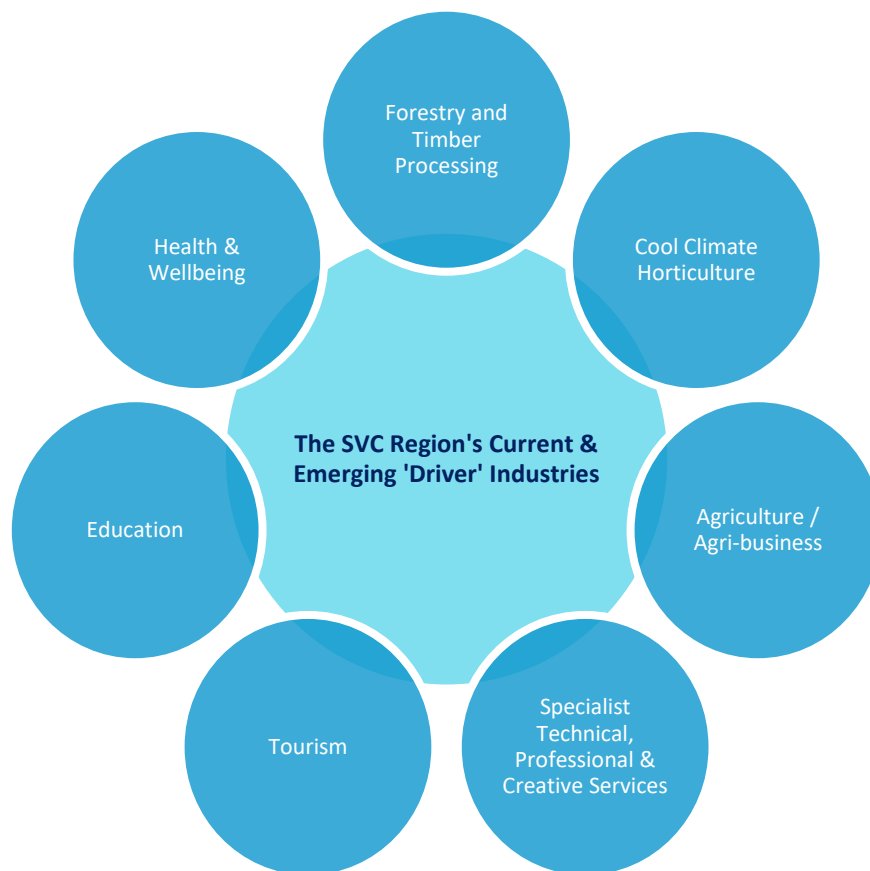
The Snowy Valleys has a diverse human resource base, a good climate, affordable quality housing, an abundance of water, exceptional community services and facilities, quality physical infrastructure and a supportive business environment. This means the Snowy Valleys is well-placed to attract prospective investors, businesses and residents looking for a vibrant rural lifestyle with a diversity of working and living opportunities.

The agriculture and softwood timber industries, including Australia's largest softwood processing mill, underpin the SVC region's economic base. Beef cattle farming (specialised) employs more working residents of the Snowy Valleys than any other industry. The softwood timber industry is the Snowy Valleys' largest employer, centred around the Visy and Carter Holt Harvey softwood processing mills in Tumut and the Hyne mill in Tumbarumba.

Other key industries include viticulture, retail, hydro-electricity generation and horticulture. The tourism industry also offers potential for growth in the region while the Federal Government's announcement of a \$2 billion expansion of the Snowy Hydro Scheme is also likely to provide an economic boost to the SVC region.

Based on the region's comparative and competitive advantages, emerging opportunities in the Snowy Valleys Council area include **apple cider, premium cool climate wine, cool climate horticulture** (such as chestnuts and blueberries), **biomass energy** using plantation timber residues, **hydro-electricity generation, aged care** and **tourism**.

The Snowy Valleys' Current and Emerging Economic Drivers



Source: SC Lennon & Associates

A Vision of Prosperity

Preparing for Prosperity articulates the vision for the Snowy Valleys' economic development, to capitalise on its traditional industry strengths in order to diversify and grow the economy of the future. The vision for economic prosperity is informed by the communities of the Snowy Valleys, including both its residents and businesses.

Snowy Valleys Council Region Economic Development Vision

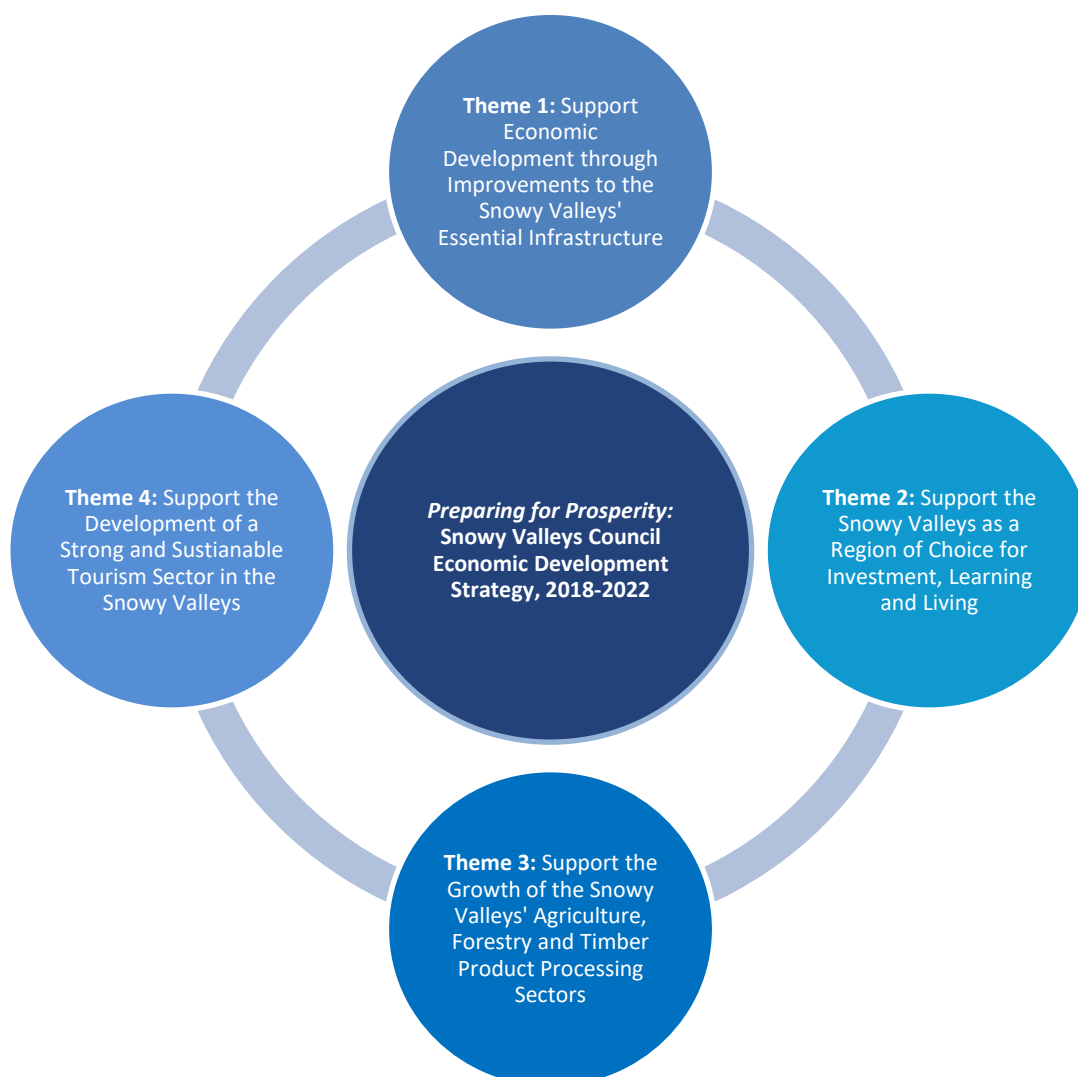
The Snowy Valleys will be a thriving, inclusive, connected and dynamic economy with an enviable lifestyle underpinned by quality infrastructure and services and employment in a diversity of innovative and sustainable local industries.

The vision is supported by Snowy Valleys Council's economic development mission and charter, which confirm Snowy Valleys Council's commitment to promoting, facilitating and co-ordinating economic development activities.

Preparing for Prosperity: A Plan of Action

Preparing for Prosperity presents a suite of 25 individual actions categorised under four strategic themes. Some actions are focused on catalyst project planning and development initiatives which require action combined with a well-planned course of project implementation for the desired outcomes to be realised. Other actions are more focussed on strategic program implementation. These are initiatives that can be addressed as part of Snowy Valleys Council's day-to-day economic development planning and facilitation functions in a strategic and informed manner.

Preparing for Prosperity: Economic Development Strategy Themes



Some actions will be **'Council-led'**, in that they involve specific tasks for Snowy Valleys Council and an allocation of human, physical and financial resources. Other actions refer to **'Council-supported'** activities and these are advocacy or support initiatives where the implementation of the actions is to be led by agencies other than Council.

From the long-list of 25 actions identified in this strategy, the following five are Council's priority actions to progressed over the first 18 months:

1. Prepare a **business case to support the upgrading of Brindabella Road** to support the safe and efficient movement of residents, workers and visitors to the Snowy Valleys Council region.
2. Undertake a Snowy Valleys Council region **industrial land demand and supply study** to confirm existing capacity to accommodate growth and identify potential gaps in supply. As part of the study, collaborate with the Department of State Development to determine the need for a large-scale industrial estate in the Tumut area incorporating a transport and logistics hub.
3. Collaborate with the NSW Government, local industry partners and the education and training sector to **establish the proposed Education and Business Centre of Excellence** in the Snowy Valleys.
4. Undertake a **scoping and concept design study for a Softwood 'Centre of Excellence'** in the Snowy Valleys.
5. **Investigate needs and opportunities for short-term accommodation product development** to serve the Snowy Valleys' visitor market.

Collaborative Partnerships for Strategy Implementation

Collaborating to cultivate economic development partnerships is key to successful strategy implementation. To this end Snowy Valleys Council will continue to collaborate with the Riverina, Riverina and Murray and Canberra Region Joint Organisations of Councils, NSW Department of Industry, NSW Department of Premier and Cabinet, RDA Riverina, RDA Murray and the region's chambers of commerce and progress associations to gain support for and to help deliver the Snowy Valleys Council Region Economic Development Strategy.

Council will also establish an annual **Snowy Valleys Economic Development Futures Forum** to re-affirm and build on the economic development directions and priorities for the SVC region. This will include the review, update and prioritisation of strategies and actions and involve Councillors and key external stakeholders.

Strategy implementation will be monitored by Council and set performance measures will be reported annually. *Preparing for Prosperity: Snowy Valleys Council Region Economic Development Strategy, 2018-2022* will be reviewed annually with an update anticipated in four years.

1. A Blueprint for Prosperity

1.1 Economic Development Strategy Purpose and Planning Framework

Preparing for Prosperity: Snowy Valleys Council Region Economic Development Strategy, 2018-2022, is a blueprint for enhancing the vibrancy, diversity and sustainability of the Snowy Valley Council region's economy and its influence on the liveability of the local government area as a whole.

The strategy has been prepared to support the communities of the Snowy Valleys Council area in accordance with Council's vision of "leading, engaging and supporting strong and vibrant communities". Informed by targeted stakeholder consultation, research and analysis, it builds on the community engagement process undertaken by Council to prepare the *Snowy Valleys Community Strategic Plan: Snowy Valleys 2028: Our Vision, Our Future*.

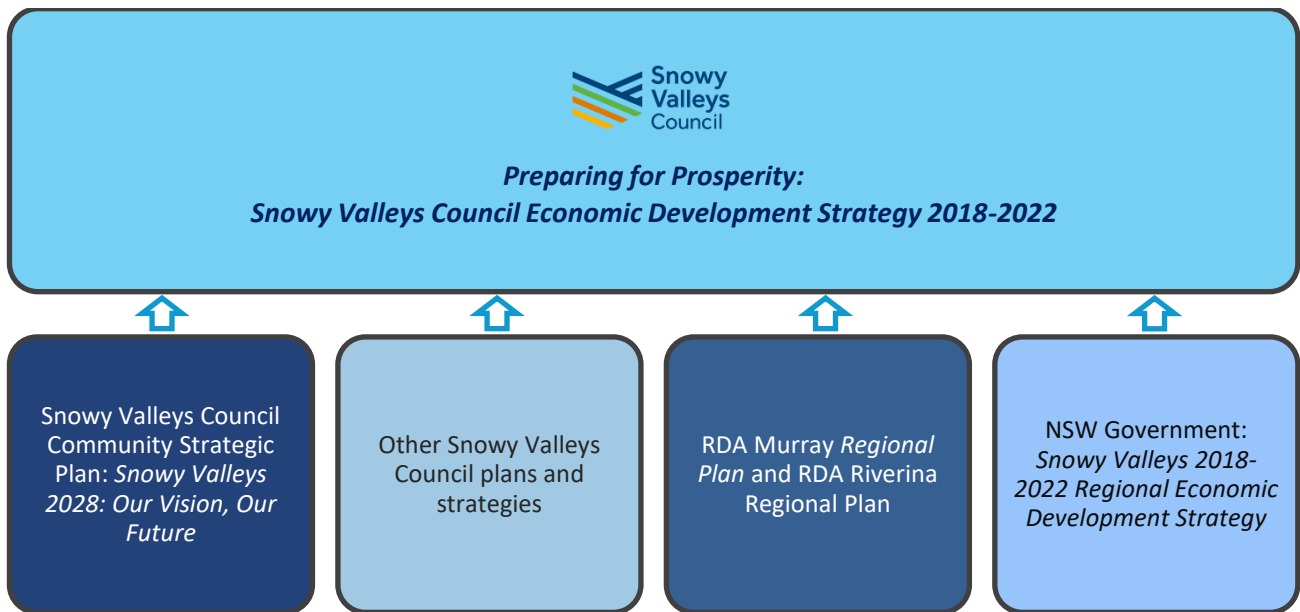
Preparing for Prosperity articulates Council's role in facilitating, supporting and promoting business activity to develop and secure a sustainable employment base and a strong economic future for the Snowy Valleys Council area. Specifically, the Snowy Valleys Council Region Economic Development Strategy delivers the following:

- It responds to **economic development issues, challenges and opportunities** for Snowy Valleys Council to address in its role as a facilitator and promoter of economic development.
- It identifies opportunities to **enhance the vibrancy and sustainability of the local economy** and its influence on the liveability of all communities in the Snowy Valleys local government area.
- It identifies **potential collaborative partnerships**, where Snowy Valleys Council can engage with other stakeholders on matters concerning local and regional economic development in the Snowy Valleys Council area.
- It sets out a long-term **vision for the economic development of the Snowy Valleys Council Region** and puts forward a Council **mission** and **charter** describing how Council will work to realise that vision over the next four years.
- It provides Snowy Valleys Council with an informed, clear, actionable and achievable '**road map**' to encourage and support economic development in the Snowy Valleys Council area.

Regional in scope and global in its outlook, *Preparing for Prosperity* aligns with the broader economic development objectives of RDA Murray's Regional Plan, RDA Riverina's Regional Plan and the NSW Government's *Snowy Valleys 2018-2022 Regional Economic Development Strategy*.

Having regard for the broader regional economic development planning framework, *Preparing for Prosperity* recognises that the Snowy Valleys Council (SVC) region's economic development will be underpinned by innovation in traditional sectors of employment, new business investments in industries including health, education and tourism, and opportunities to develop the region's emerging 'knowledge-based' industries in agriculture, forestry and related services.

Figure 1. Snowy Valleys Council Region's Economic Development Planning Framework



Source: SC Lennon & Associates

A plan of action to address both challenges and 'headwinds' against future prosperity and opportunities for economic development forms the backbone of *Preparing for Prosperity*. The region's challenges which the Strategy seeks to address concern those 'enablers' of economic development which Snowy Valleys Council can help influence.

This includes the region's physical and community infrastructure, its regulatory and land-use planning framework, the capacity and location of its employment land and its lifestyle attributes and sense of place. Opportunities for economic growth and development stem for the SVC region's strategic comparative and competitive advantages.

1.2 Capitalising on Competitive Advantage

Comparative advantage is an area of relative strength or specialisation. Efforts to develop the SVC regional economy will be most successful if they focus on building on such strengths. The region's business and industry sector can also use the region's comparative advantage to build a competitive advantage, which is developed through the combination of factors such as knowledge, resources, skills and the ability to innovate.

The Snowy Valleys Council region's comparative advantage stems from the area's diverse landscape and natural resource base, with key industries developing out of timber and agriculture, and emerging industries which capitalise on the quality of the region's natural landscape and its appeal as a 'lifestyle destination'. These emerging industries include tourism and the professional, technical and creative services industries.

The SVC region has a diverse human resource base, a good climate, affordable quality housing, an abundance of water, exceptional community services and facilities, quality physical infrastructure and a supportive business environment. This means the Snowy Valleys is well-placed to attract prospective investors, businesses and residents looking for a vibrant rural lifestyle with a diversity of working and living opportunities.

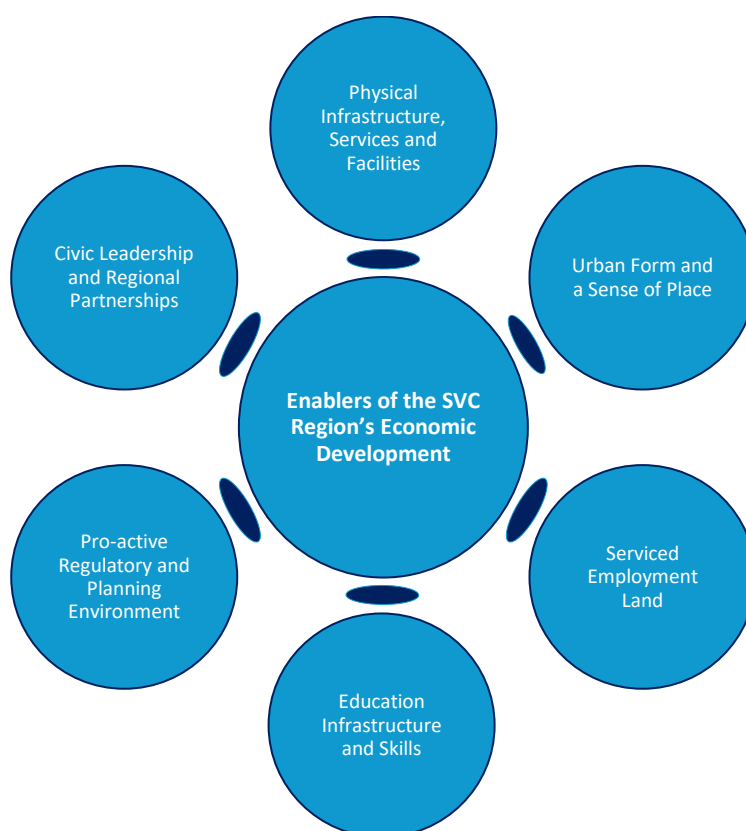
1.3 A Strategy to Enable and Promote Economic Development

Recognising that the private sector (industry) drives economic development, *Preparing for Prosperity* is a plan of action to help nurture the foundations for economic development – including strategic infrastructure, access to employment and places where industry can invest and do business. These are the things that can help stimulate, attract and maintain business activity, investment and employment in the Snowy Valleys and its local communities.

The economic development enablers include key infrastructure, such as local transport networks, appropriately zoned land, the form and function of the Snowy Valleys' towns and activity centres, as well as community services and facilities such as local libraries and aged care services. They also include the region's 'lifestyle' attributes - including its sporting facilities, parks and gardens, heritage buildings, arts and cultural services and facilities and its recreation, leisure and entertainment facilities.

Another important enabler of economic development is the local policy, town planning and regulatory framework that is supportive of business innovation, investment and industry growth in the Snowy Valleys.

Figure 2. The Enablers of the Snowy Valleys Council Region's Economic Development



Source: SC Lennon & Associates

Enablers which Snowy Valleys Council is not directly responsible for, but which it can influence to varying degrees through collaborative partnerships with other tiers of government or institutions include regional transport and communications infrastructure, health and community services, research and education infrastructure and a supportive regional planning framework.

2. Informing Prosperity: The Snowy Valleys Economy

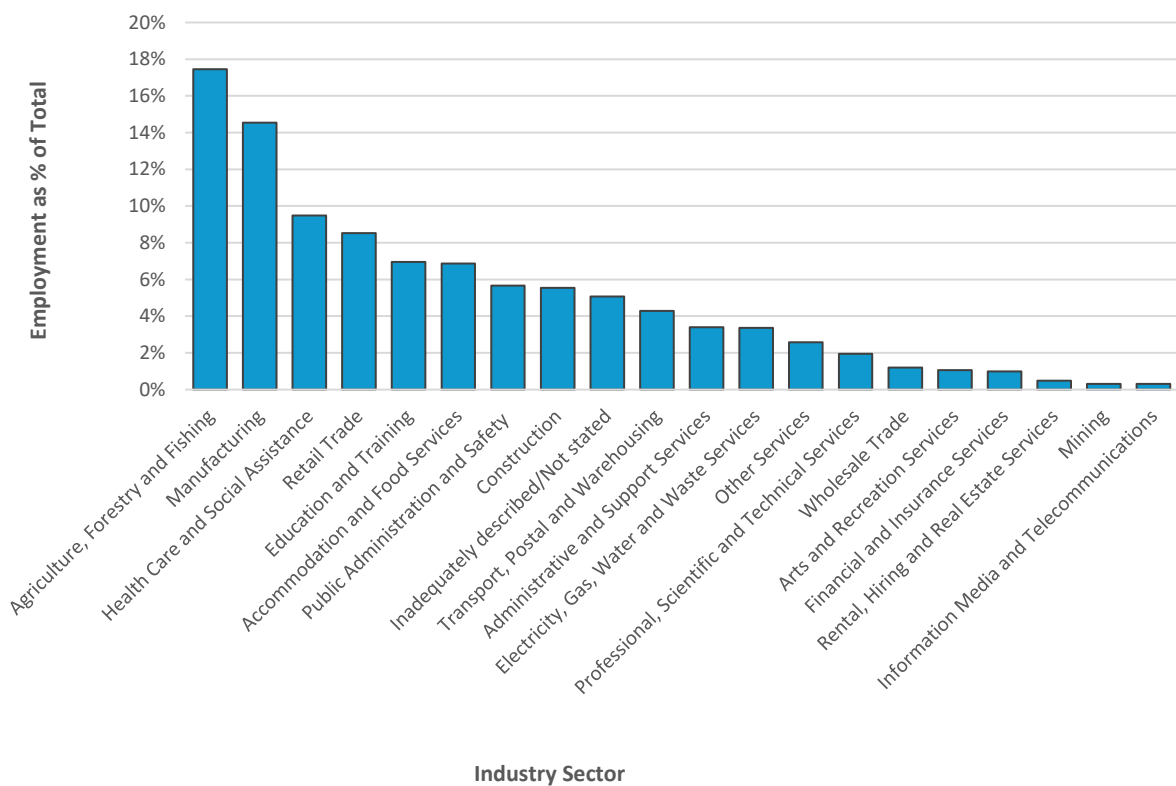
2.1 Economic Strengths and Industries of the Future

The Snowy Valleys Council (SVC) region, located in the western foothills of the Snowy Mountains and bordered by the Kosciuszko National Park and Murray River, covers 8,960 square kilometres. According to the 2016 Census data, the Snowy Valleys, with a population of 14,395, is home to 5,895 jobs. The March 2018 data from the Department of Jobs and Small Business shows the Snowy Valleys Council area has an unemployment rate of 5.3% compared to the NSW average of 4.8% and a national average of 5.5%.

The 2016 New South Wales State and Local Government Area Population Projections (prepared by the NSW Department of Planning and Environment) indicates the population of the SVC region is expected to decline by 9.1% from 14,750 in 2011 to 13,400 in 2036. The region's population profile presents some challenges for economic development with regard to generating investment, business development and job creation. Recognising the region's potential for economic diversification, *Preparing for Prosperity* seeks to address these challenges.

Industries are changing rapidly and so too are the places where people live and work. The Snowy Valleys has experienced changes in demography, which will have implications for the region's workforce, economic capacity and service provision in coming years.

Figure 3. Employment by Industry (Jobs by Location), Snowy Valleys Council Region, 2016



Source: ABS Census, Working Population Profile, 2016

The major industries that currently drive and support economic activity in the Snowy Valleys are agriculture (with the largest employer of Snowy Valleys residents being the beef cattle farming sector), the softwood timber production and processing industry, health care and social assistance, retail trade and tourism-related activity (accommodation and food services).

The **agriculture and softwood timber industries**, including Australia's largest softwood processing mill, underpin the SVC region's economic base. Beef cattle farming (specialised) employs more working residents of the Snowy Valleys than any other industry. The softwood timber industry is the Snowy Valleys' largest employer, centred around the Visy and Carter Holt Harvey softwood processing mills in Tumut and the Hyne mill in Tumbarumba.

According to IBISWorld (March 2017), Australia's forestry and logging industry export revenue has grown substantially since 2013-14, driven by the increasing need for building materials in China. The industry is forecast to grow at an annualised 2.4% to 2021-22, to \$5 billion. Opportunities to value add to the agricultural production chain, through export market growth, processing, packaging and distribution, present exciting opportunities for the SVC region.

Other key industries include **viticulture**, **retail**, **hydro-electricity generation** and **horticulture**. Agriculture in Australia is continually evolving. For example, the horticultural sector is rapidly-growing and is Australia's third-largest agricultural sector after livestock and broad acre farming. The industry is evolving with a growing trend towards technologically complex, high-yielding and resource-efficient greenhouses using renewable energy such as wind and solar generation to grow a diversity of crops. Technological advances are present in relation to precision agriculture or 'satellite farming', which refers to the use of GPS tracking systems and satellite imagery to monitor crop yields, soil levels, and weather patterns to increase efficiency on the farm.

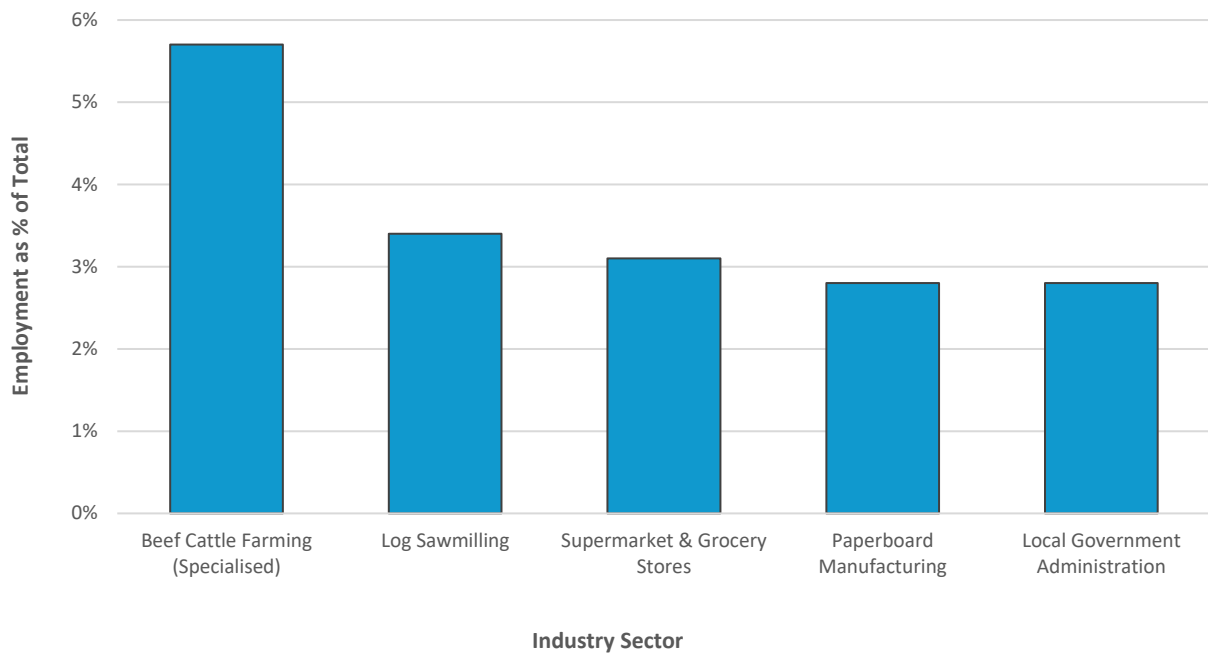
The **tourism** industry also offers potential for growth in the region. For example, the Tumbarumba to Rosewood Rail Trail has been approved by the NSW Government to be a pilot NSW rail trail, and there are likely to be food, wine and cycle tourism opportunities created by this.

Australia's already healthy tourism industry continues to grow as new markets emerge, particularly in Asia where the Indian, Malaysian and Chinese middle-class is driving much of the industry's income growth. According to IBISWorld (October 2017), over the five years through 2022-23, Australia's tourism industry revenue is expected to increase by an annualised 3.0% to total over \$150 billion. The industry in Australia is expected to further enhance its online capabilities as consumers increasingly use the internet to research and organise trips.

The Riverina Murray Destination Network is preparing a Destination Management Plan, with a number of prospects identified for the Snowy Valleys, including adventure tourism and drive tourism opportunities. The Federal Government's announcement of a \$2 billion expansion of the **Snowy Hydro Scheme** is also likely to provide an economic boost to the SVC region.

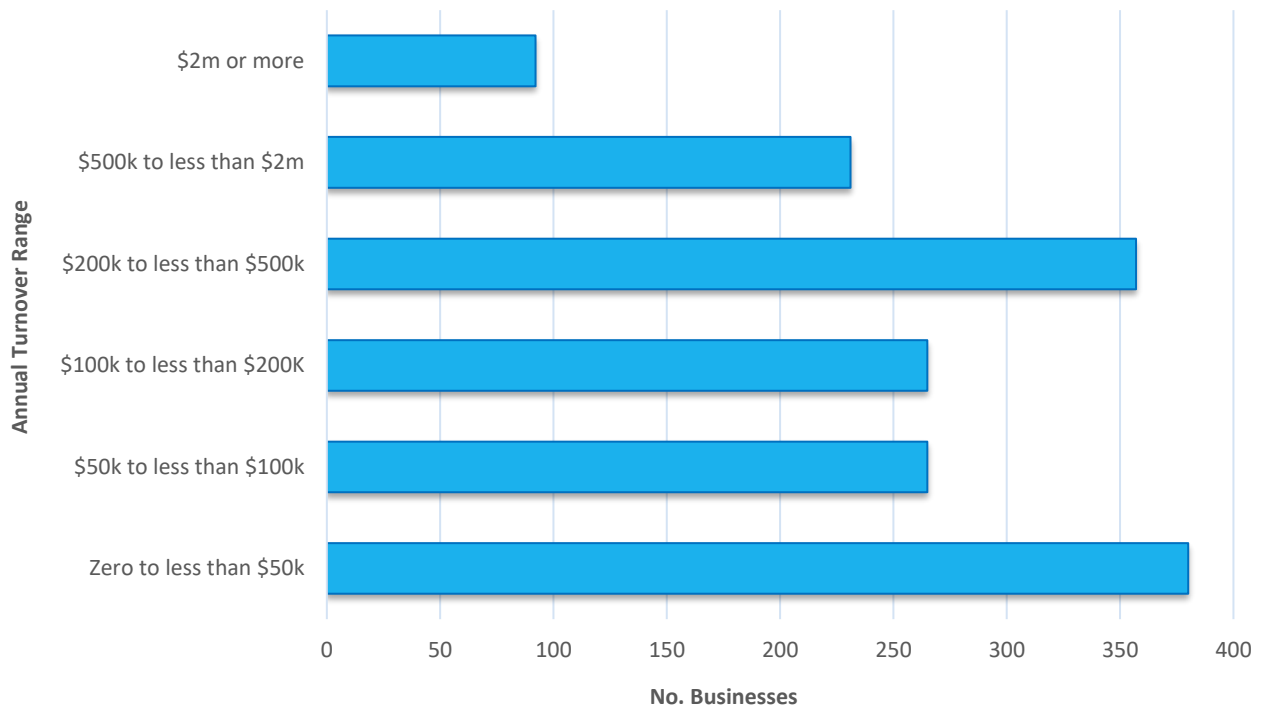
The Snowy Valleys Council area has a mix of business types, from micro-businesses right through to large employers. The area's larger employers include Snowy Hydro Limited, National Parks and Wildlife Service, the Forestry Corporation of NSW, national retail chains and the Mannus Correctional Centre.

Figure 4. Main Industries of Employment (% of Total), Snowy Valleys Council Region's Working Residents, 2016



Source: ABS Census, General Community Profile, 2016

Figure 5. Business Size by Turnover Range, Snowy Valleys Council Region, June 2016



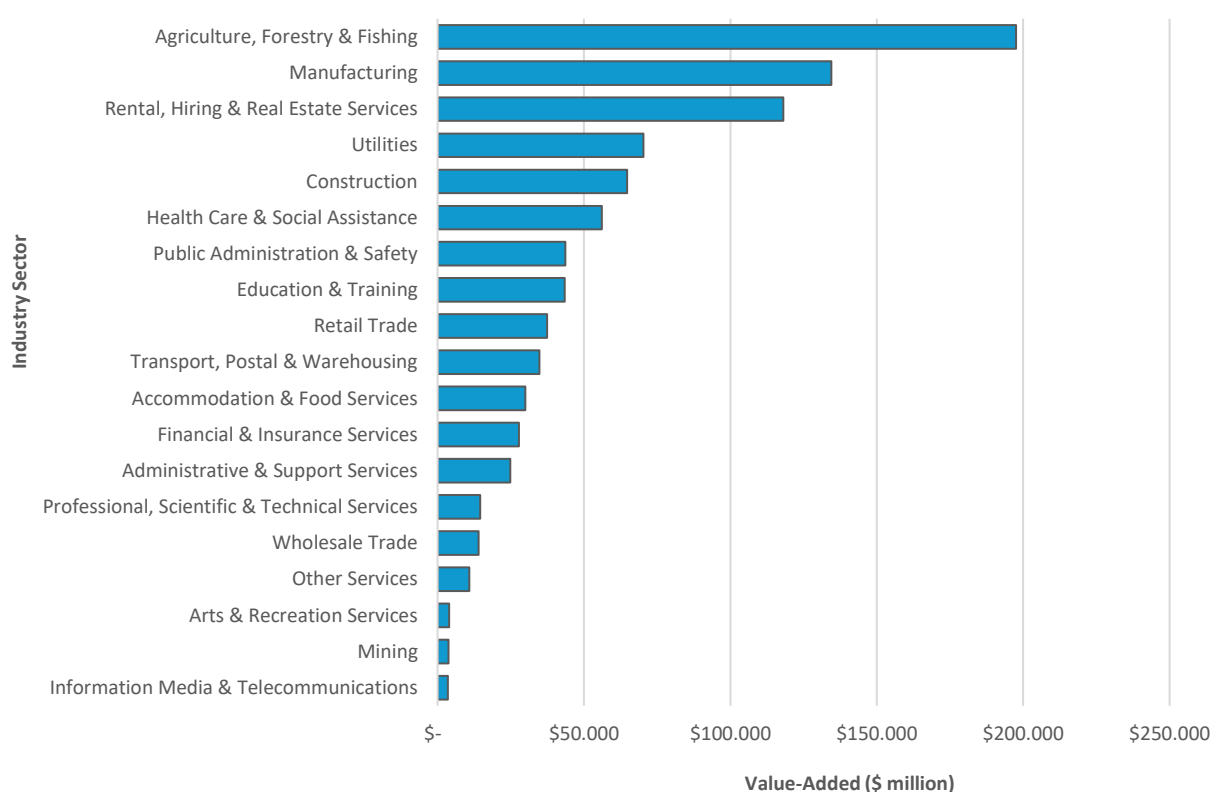
Source: ABS, 8165.0 Counts of Australian Businesses, June 2016

According to REMPLAN (December 2017), the SVC region's gross regional product (GRP), which is the total value of goods and service produced in the region over the period of one year, is \$999,227,000. GRP per capita is \$69,400,000 compared to the NSW average of \$77,225,000.

The total value-added estimate for the SVC region is \$933.6 million. The largest contributors to the region's industry value-added include agriculture, forestry and fishing, which accounts for around one-fifth (21%) of the region's total value-added.¹ Other notable contributors include manufacturing, which is closely linked to the region's agriculture and forestry sector (14% of total value-added), rental hiring and real estate services (13%) and electricity, gas, water and waste services (7.5%).

Economic modelling by REMPLAN also shows the value of goods and services produced by industry sectors in the SVC region that are sold to consumers, businesses, and governments based outside the region's boundaries (inter-regional exports). This includes 'exports' to locations in other parts of NSW, Australia and overseas. The total estimated value of inter-regional exports for the SVC region is \$1.1 billion, which is 50% of the value of the region's total economic output. Those industries responsible for the majority of the region's exports include paper product manufacturing, sawmill product manufacturing, forestry and logging, sheep, grains, beef and dairy cattle farming and electricity generation.

Figure 6. Value-Added by Industry Sector (%), Snowy Valleys Council Region, 2016



Source: REMPLAN (December 2017) with interpretations by SC Lennon & Associates

¹ Value-added is considered to be a better reflection of the strength or otherwise of a local or regional economy because it refers to only the value of output generated in the region less the cost of inputs such as the purchase of machinery and equipment and other non-labour inputs used in the production process

The SVC region's industry and employment profile, together with an assessment of broader economic trends and prospects, informs an understanding of the region's competitive strengths and its current and emerging economic drivers.

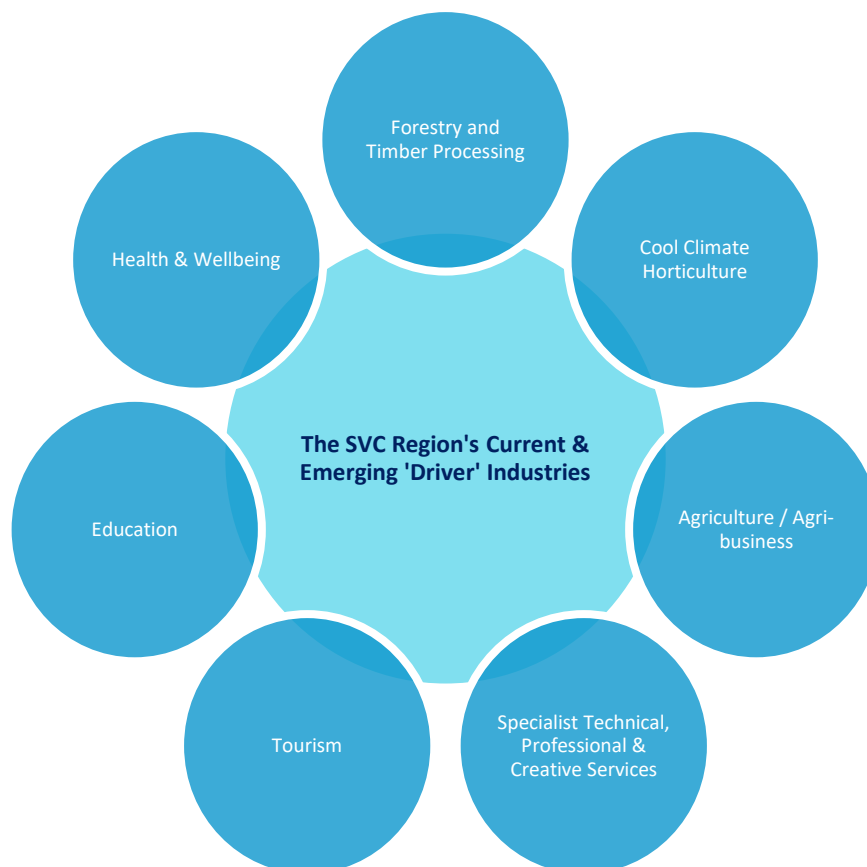
2.2 The Snowy Valleys' Current and Emerging Economic Drivers

The industries that drive the Snowy Valleys Council region's economy in terms of regional exports, employment and industry value-added include agriculture, manufacturing (predominantly paper and sawmill product manufacturing), utilities and health care.

The region's other key and emerging industries like transport and logistics and professional, scientific and technical services, are closely integrated with the region's driver industries through local and regional supply chain links. Other population-driven industries, like construction, retail trade, social assistance, personal services and public administration are important employers which are reliant on the SVC region's economic drivers for their own sustainability and growth.

Based on the region's comparative and competitive advantages, emerging opportunities in the Snowy Valleys Council area include **apple cider**, **premium cool climate wine**, **cool climate horticulture** (such as chestnuts and blueberries), **biomass energy** using plantation timber residues, **hydro-electricity generation**, **aged care** and **tourism**.

Figure 7. The Snowy Valleys' Current and Emerging Economic Drivers



Source: SC Lennon & Associates

2.3 The Snowy Valleys Council Region's Opportunity to Prosper

Snowy Valleys Council, as a facilitator of economic development, recognises the need to plan for a future economy which will be defined by its traditional comparative and competitive advantages, rapidly changing technology and the emergence of new industries, activities and jobs. Council will continue to work in collaboration with its partners at the State and Federal levels, and industry, to help facilitate the region's opportunities to prosper.

An assessment of the Snowy Valleys Council Region's socio-economic profile against a backdrop of broader trends and influences on future prosperity re-affirms the region's opportunities to prosper. It also confirms the findings of extensive community consultation, which was undertaken by Snowy Valleys Council to inform the development of its Community Strategic Plan. A number of place-based economic development themes were identified as opportunities for the towns and communities of the region, including: support for **tourism**; support for **small business**; addressing **youth unemployment**; addressing key **infrastructure** needs; and improving the **lifestyle** appeal of the towns.

Those industries with existing relative strengths and which present opportunities for growth in the Snowy Valleys, include **agriculture, food and forestry, tourism, health care**, new forms of (advanced) manufacturing in **agriculture** and **timber processing** and **professional, scientific, technical** and **creative services**. Capitalising on these opportunities to prosper requires further investment in education and training.

There is a high correlation between regional economic growth and higher educational attainment, which can be observed in cities and regions throughout the world. The tertiary **education** sector is at the frontier of the knowledge economy. Students at universities in Australia's regions face unique challenges compared to their metropolitan counterparts such as lower average incomes and social dislocation associated with having to move away from home to attend university. People from major cities are twice as likely to hold a degree than those from regional areas. This points to the opportunity for Snowy Valleys Council to collaborate with educators and industry to meet the challenge of equipping the region's workforce to address skills gaps and opportunities for employment.

Opportunities to diversify through the growth and development of existing industries as well as new economic activities, combined with the Snowy Valleys' lifestyle attributes, makes the area an appealing prospect for new industries. The region has the attributes which typically appeal to 'knowledge workers' seeking a lifestyle which offers the best of living combined with access to jobs, clients and markets throughout Australia and around the world.

According to the Regional Australia Institute, more Australians aged 25-44 are moving from cities to regional areas than those moving from the country to the city. Many of these are 'Regional Returners', people who left the regions as young adults, but are choosing to return home later in life, and a number are professionals with a mix of skills. The value of lifestyle, affordable housing, proximity to friends and family and access to schools, childcare and health services make regional areas like the Snowy Valleys an attractive alternative to the capital cities.

The Snowy Valleys' attributes, coupled with an understanding of the community's aspirations as articulated in Council's Community Strategic Plan, informs the vision for prosperity, together with Council's mission and charter to facilitate and promote activities to enhance the vibrancy and sustainability of the economy and the liveability of all communities in the Snowy Valleys.

3. A Vision of Prosperity

3.1 Key Messages

Preparing for Prosperity has been informed by targeted research, stakeholder consultation and analysis. The consultation findings provide critical input, ensuring the strategy reflects stakeholder views regarding key issues, challenges and opportunities for economic development in the Snowy Valleys.

Economic Development Issues and Challenges

- **Transport and Communications Connectivity** - Digital connectivity was widely reported as being of a poor quality throughout the Snowy Valleys Council region. The quality of roads in the region is considered to be generally poor and not up to standard. For example, the road from Tumbarumba to Wagga is poor for a major freight route. There is a need to invest in the region's road connections to improve freight efficiencies.
- **Power and Water** - Access to natural gas, electricity and water for industry is constrained. For example, the feeder line into Tumbarumba is hampered by regular unscheduled power outages because there is no back feed.
- **Industrial Land** - It was reported that many businesses are at capacity on existing sites and have limited options elsewhere in the region. A lack or perceived lack of industrial land adversely impacts on the attractiveness of the region to prospective businesses and investors.
- **Education Infrastructure and Workforce Skills** - Attraction and retention of skilled employees is a challenge for the region. Concerns raised included availability of quality housing, childcare facilities and job opportunities for partners. There is a reported shortage of tradespeople in the region. The region's ageing workforce poses a potential challenge for industry in the future.
- **Residential Land and Housing Shortages** - Residential land availability and affordable rental accommodation are an issue in parts of the SVC region. This adversely impacts upon the capacity of businesses in the region to attract and retain workers. It also limits the availability of housing for seasonal workers, particularly in Batlow and Tumbarumba. Concerns were raised regarding the potential impacts of Snowy Hydro 2.0 on housing and infrastructure demands (particularly in Talbingo, Tumut and Khancoban). Businesses need information on Snowy Hydro 2.0 to understand impacts as well as opportunities.
- **Regulatory and Land Use Planning Constraints** - It was reported that Council planning regulations are not keeping pace with the changing needs of the agricultural sector. For example, smaller allocations of land should be allowed to support growth in intensive horticulture (e.g. 40 acres). While the previous planning and development assessment system has been overly compliance-based and not solutions-focussed, this is changing, and the signs are positive.
- **Tourism Infrastructure Shortfalls** - The Snowy Valleys Council region has a lack of visitor accommodation, experiences and basic visitor infrastructure to accommodate potential growth markets.

Economic Development Opportunities

- **Industry Drivers and Opportunities for Growth** - The Snowy Valleys Council area's existing and emerging industry drivers include: Agriculture, Food & Forestry / Timber (including processing); Health & Wellbeing; and Tourism.
- **Emerging Industry Opportunities** - Emerging industry opportunities include: Advanced Manufacturing (including value-added timber processing (engineered wood products, e.g. laminated timber), meat processing; ethanol production, nutraceuticals, horticulture and viticulture); Agri-business / Agri-tech (including controlled environment horticulture and new crops such as hops); Transport & Logistics; and Disability and Aged Care Services.
- **Education Infrastructure and Workforce Skills** - There is an opportunity to establish tailored workforce planning and development in the SVC region, particularly in the key industry sectors of timber and meat processing. (The Forestry Industry Council has links to local high schools). The SVC region could explore tailored skilled migration programmes for industries in the Snowy Valleys. Council can facilitate partnerships between local schools and TAFE to address the region's workforce planning needs.
- **Transport and Communications Connectivity** - The development of a rail freight link from Tumut to Wagga presents an opportunity to develop the region's freight transport industry and improve road freight efficiencies. Road upgrades as per the Softwoods Working Group strategy would facilitate growth of the timber and transport industries and reduce impacts on urban and rural amenity. Council could invest in network planning to address road capacity constraints to support growth of the horticulture and viticulture industries (e.g. taking B-Doubles off the highway to access properties via Council roads and future B-Triple and Quad access).
- **Lifestyle Destination** - The Snowy Valleys can be promoted to prospective businesses and residents as a lifestyle destination with attributes including: a sense of community; family-friendly; and quality schools, health care and sporting facilities.
- **Place-based Economic Development** - Ideas to help grow the regional economy through local place-based initiatives include: supporting local tourism, including improvements to visitor amenities, accommodation development, ecotourism and signage; supporting and promoting caravan/RV parking; providing support for small businesses and a focus on youth employment; addressing key local infrastructure needs, including road upgrades and maintenance and mobile phone coverage; developing or re-purposing disused buildings and related infrastructure; and improving the lifestyle appeal of towns, including town beautification projects, recreation facilities development, community support services and community events and activities.

The issues, challenges and opportunities identified through the targeted stakeholder consultation and engagement, coupled with the community's vision for the Snowy Valleys as captured in Council's Community Strategic Plan, help inform the economic development vision for the Snowy Valleys Council region. The also guide Council's focus on economic development promotion and facilitation as articulated in its economic development mission and charter.

3.2 The Economic Development Vision

Preparing for Prosperity articulates the vision for the Snowy Valleys' economic development, to capitalise on its traditional industry strengths in order to diversify and grow the economy of the future. The vision for economic prosperity is informed by the communities of the Snowy Valleys, including both its residents and businesses.

Snowy Valleys Council Region Economic Development Vision

The Snowy Valleys will be a thriving, inclusive, connected and dynamic economy with an enviable lifestyle underpinned by quality infrastructure and services and employment in a diversity of innovative and sustainable local industries.

The vision is supported by Snowy Valleys Council's economic development mission and charter.

3.3 Snowy Valleys Council's Economic Development Mission and Charter

The mission and charter describe Snowy Valleys Council's commitment to promoting, facilitating and co-ordinating economic development activities.

Preparing for Prosperity:

Snowy Valleys Council's Economic Development Mission Statement

Building on our strengths in a diversity of traditional and emerging industries, we will prepare for future prosperity through sound planning and informed action to support sustainable economic activity and employment.

In supporting innovation, diversification and growth of the region's existing businesses and through its efforts to attract new investment, Snowy Valleys Council:

1. Prioritises initiatives that support innovation and development of the region's **key sectors in agriculture, forestry, horticulture, agribusiness, education, health and wellbeing and tourism**, with an emphasis on new opportunities in value-added economic activities which target existing, new and emerging markets.
2. Prioritises activities that support **the growth of 'knowledge-intensive' economic activities** in education, health and wellbeing, horticulture, timber, agribusiness and knowledge-based business services.
3. Pro-actively engages with the Snowy Valleys Council region's **micro, small-to-medium and large businesses** to address shared challenges and opportunities for business investment, innovation, growth and development.
4. **Promotes Adelong, Batlow, Khancoban, Talbingo, Tumbarumba and Tumut to prospective visitors, residents and investors**, using a strategic, informed and targeted approach consistent with the vision for the region's economic development.
5. Undertakes a **partnership approach to economic development**, working in collaboration with other tiers of government, key institutions and industry to help build on the region's strengths to promote prosperity.

3.4 Collaboration for Regional Growth and Prosperity

Preparing for Prosperity provides the framework for Snowy Valleys Council to affect change and promote economic development through the implementation of workable, practical actions. It articulates and promotes a partnership approach between Snowy Valleys Council and other stakeholders in government, the non-government sector, the community and industry.



This includes Federal Government agencies such as Regional Development Australia (RDA) Riverina, RDA Murray and State Government agencies including the Department of Planning & Environment, the Department of Industry, the Office of Regional Development (ORD) of the Department of Premier and Cabinet and Destination NSW. It also involves other important contributors to economic development including the Regional Universities Network, TAFE, the region's Registered Training Organisations (RTOs) and local business chambers and associations.

By informing a strategic and targeted approach to economic development, *Preparing for Prosperity* provides Snowy Valleys Council and its partners with the tools to influence the factors that facilitate the resilience, competitiveness and success of local businesses and the capacity of the SVC region to attract new investment to grow the economy and create jobs.

Preparing for Prosperity is informed by consultation and engagement with a diversity of stakeholders. It is based on a solid understanding of the SVC region's socio-economic trends and characteristics, and the influences and impacts of broader economic trends taking place nationally and globally.



4. Preparing for Prosperity: A Plan of Action

4.1 Economic Development Strategy Themes

Preparing for Prosperity documents opportunities and actions for Snowy Valleys Council and its partners in government, the non-government sector, industry and the community to address collaboratively in order to facilitate change towards a prosperous future. The actions are informed by the economic development vision and Council's economic development mission and charter. Prioritising where Council's resources can best be directed for the purpose of facilitating and promoting economic development is a key outcome of this strategy. *Preparing for Prosperity* contains four strategy themes. They are:

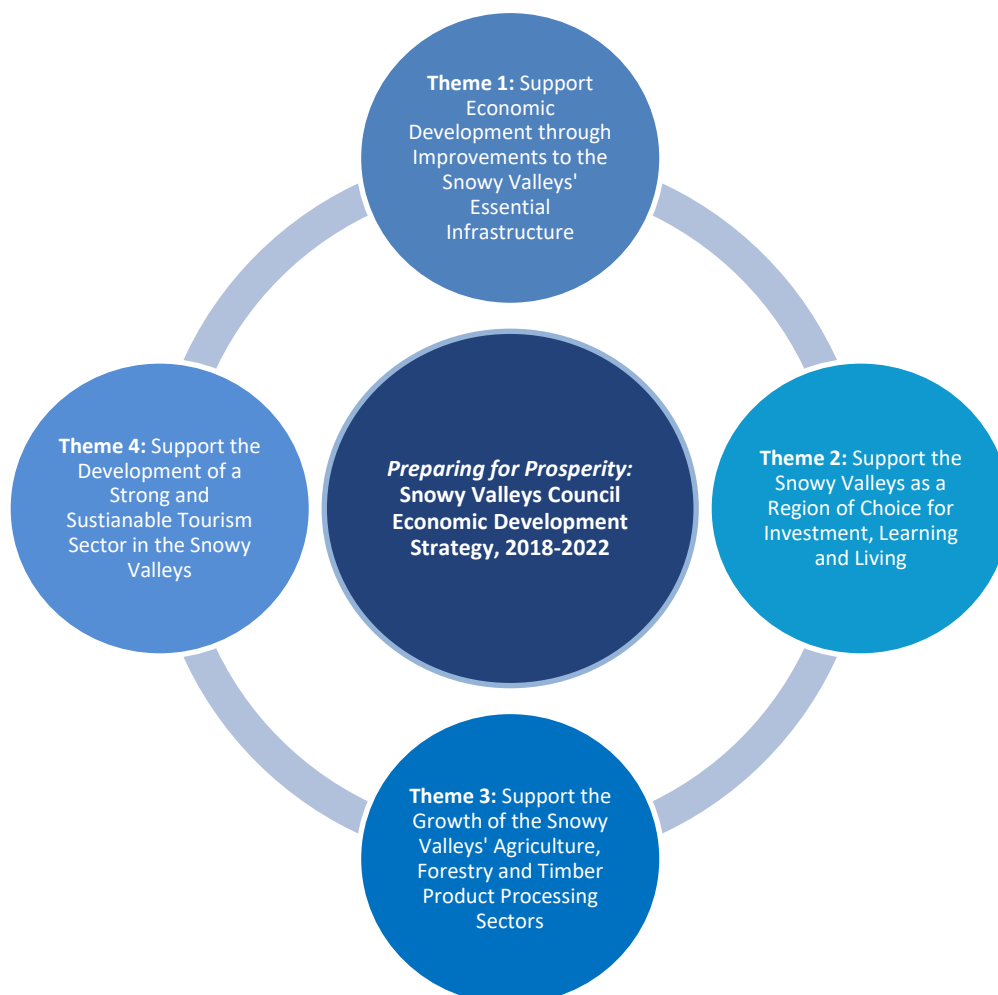
Theme 1: *Support Economic Development through Improvements to the Snowy Valleys' Essential Infrastructure*

Theme 2: *Support the Snowy Valleys as a Region of Choice for Investment, Learning and Living*

Theme 3: *Support the Growth of the Snowy Valleys' Agriculture, Forestry & Timber Product Processing Sectors*

Theme 4: *Support the Development of a Strong and Sustainable Tourism Sector in the Snowy Valleys*

Figure 8. *Preparing for Prosperity*: Economic Development Strategy Themes



Preparing for Prosperity presents a suite of 25 individual actions categorised under the four strategic themes accordingly. Each action area or theme includes a rationale, which is a statement providing a logical basis for the actions identified

Some actions are focused on catalyst project planning and development initiatives which require action combined with a well-planned course of project implementation for the desired outcomes to be realised. Other actions are more focussed on strategic program implementation. These are initiatives that can be addressed as part of Snowy Valleys Council's day-to-day economic development planning and facilitation functions in a strategic and informed manner.

Some actions will be **'Council-led'**, in that they involve specific tasks for Snowy Valleys Council and an allocation of human, physical and financial resources. Other actions refer to **'Council-supported'** activities and these are advocacy or support initiatives where the implementation of the actions is to be led by agencies other than Council.

4.2 Economic Development Strategy Action Plan

Theme 1: Support Economic Development through Improvements to the Snowy Valleys' Essential Infrastructure

Rationale

Infrastructure underpins economic activity and is fundamental to a prosperous economy. It includes transport infrastructure, power and water, serviced industrial / employment land and communications. The availability of serviced employment land has been a constraining shortfall in the Snowy Valleys, particularly in the Tumut area.

Digital communications technology has become a fundamental enabler of business innovation and economic development, and the emergence of the digital economy has increased the propensity for individuals and businesses to interact and trade with suppliers, partners and customers through information and communications technologies.



Digital connectivity is widely-recognised as being of a poor quality throughout the Snowy Valleys Council Region. The quality of roads in the region is considered to be generally poor and not up to standard. Access to natural gas, electricity and water for industry is constrained and a lack or perceived lack of industrial land in the SVC region adversely impacts on the area's attractiveness to prospective businesses and investors. These are critical elements of the region's enabling infrastructure that need to be addressed to support the region's economic development prospects.

Council-led Actions

- 1.1 Prepare a business case to support the upgrading of Brindabella Road to support the safe and efficient movement of residents, workers and visitors to the Snowy Valleys Council region.
- 1.2 Prepare a business case to seal the Talbingo to Batlow Road (Yellowin access road).
- 1.3 Undertake a scoping study of the potential for development of a rail freight link from Tumut to Wagga via Cootamundra.
- 1.4 Undertake a Snowy Valleys Council region industrial land demand and supply study to confirm existing capacity to accommodate growth and identify potential gaps in supply. As part of the study, collaborate with the Department of State Development to determine the need for a large-scale industrial estate in the Tumut area incorporating a transport and logistics hub.

Council-supported Actions

- 1.5 Collaborate with the Softwoods Working Group and NSW Department of Premier and Cabinet to implement road upgrades as identified in the Softwoods Working Group Strategy.
- 1.6 Collaborate with the NSW Department of Premier and Cabinet, RDA Riverina and RDA Murray to investigate alternative delivery models for regional wireless connectivity in the Snowy Valleys.
- 1.7 Work with Essential Energy to identify potential solutions to regular, unscheduled power outages in Talbingo, Tumbarumba and surrounding communities.

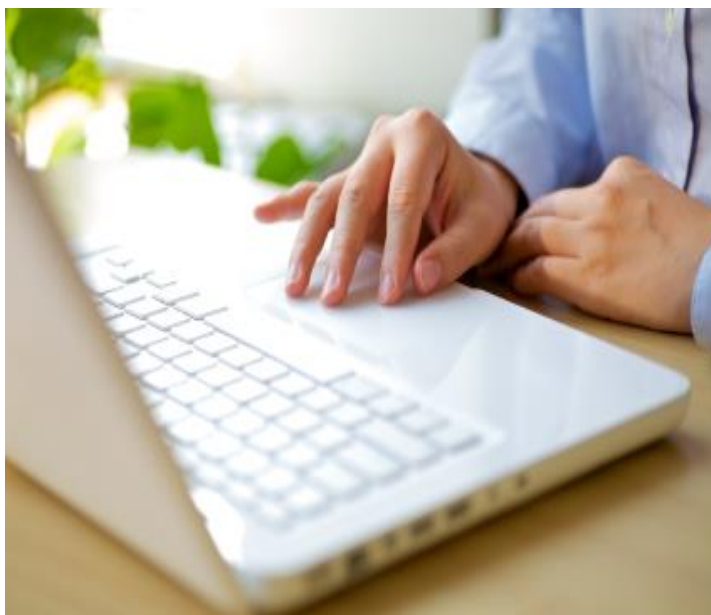


Theme 2: Support the Snowy Valleys as a Region of Choice for Investment, Learning and Living

Rationale

Industry drives regional economies and, from Council's perspective, promoting prosperity requires a two-pronged approach – investment attraction together with initiatives to support the Snowy Valleys' existing businesses.

To attract new investment, the Snowy Valleys needs to articulate its value proposition. This requires a strategic and targeted approach to attract business owners and their families to live and work in the region. It also requires Council to pro-actively seek out new investment opportunities and to facilitate change through its town planning functions and the delivery of infrastructure, including, for example, telecommunications infrastructure and employment land (addressed in Theme 1).



Affordable quality housing and community infrastructure is essential for attracting new residents to the Snowy Valleys and for retaining the existing population. Like physical infrastructure, which is necessary for supporting economic activity, quality 'community' infrastructure is a fundamental enabler of economic development for the role it plays in facilitating social and economic interaction and exchange. It includes recreation, sporting, leisure and entertainment facilities, cultural facilities and essential community services and facilities.

Council-led Actions

- 2.1 Collaborate with the NSW Government, local industry partners and the education and training sector to establish the proposed Education and Business Centre of Excellence in the Snowy Valleys.
- 2.2 Undertake a housing and accommodation needs assessment to identify issues and solutions to inform policy decisions related to the local housing market (including seniors' housing) that could be adopted by Council.
- 2.3 As part of the housing and accommodation needs assessment, work with Snowy Hydro Limited to identify potential housing demand and impacts on communities from the Snowy Hydro Scheme. Assess potential demand and impacts on social infrastructure and develop Council strategies in response.
- 2.4 Investigate business incentives options including, for example, rates discounts, reduced developer contributions charges, reduced building certificate charges, business start-up grants, local employment grants, etc. for Council to consider as part of an investment attraction strategy.
- 2.5 Progress the development of a multipurpose sports and community hub in Tumut.

Council-supported Actions

- 2.6 Collaborate with BEC Business Advice and the NSW Department of Industry to facilitate information on and access to NSW Government programs designed to grow the capacity of new and developing businesses, including home-based businesses in the Snowy Valleys.
- 2.7 Work with Service NSW to scope opportunities to establish the *Easy to do Business Program* in the SVC region to help address red tape in the form of time delays, regulations complexities and duplication issues that business owners face when starting or growing a business.
- 2.8 Collaborate with the NSW Department of Industry to design and implement a *Snowy Valleys: Open for Business* investor prospectus targeting selected industries and occupations to help grow the Snowy Valleys and wider region as a location of choice for businesses and individuals.

Theme 3: Support the Growth of the Snowy Valleys' Agriculture, Forestry and Timber Products Processing Sectors

Rationale

The Snowy Valley Council Region's comparative advantage stems from various sources, including its geographic location, availability of natural resources, access to infrastructure and the skill profile of the local population. The economic strengths of the Snowy Valleys Council Region are built upon the region's diverse landscape and natural resource base.

The major industries that drive and support economic activity in the Snowy Valleys are agriculture, forestry and softwood timber production and processing.



The agriculture and softwood timber industries including Australia's largest softwood processing mill underpin the SVC region's economic base. Specialised beef cattle farming employs more working residents of the Snowy Valleys than any other industry and the region's emerging agricultural activities include horticulture and viticulture.

The sustainable operation and performance of the SVC region's economic drivers requires infrastructure to enable access to national and international markets. However, agricultural and forestry activity in the region is currently constrained by issues regarding access to and reliability of critical enabling infrastructure to enhance the sectors' productivity and output as well as opportunities to grow. Addressing key infrastructure needs will support the industries' capacity to grow, add value and prosper.

Council-led Actions

- 3.1 Undertake a scoping and concept design study for a Softwood 'Centre of Excellence' in the Snowy Valleys. The study should consider the multiple roles and functions that such a centre could play, including supporting industry innovation through research and development, as a visitor and education centre and possible re-location of the Forestry Corporation headquarters.
- 3.2 Working in partnership with Industry NSW, RDA Murray and RDA Riverina, host a *Snowy Valleys Region Manufacturers' Forum* to explore the concept of and opportunities for a regional advanced manufacturing cluster focusing on value adding in the forestry and timber processing and agri-business sectors.

Council-supported Actions

- 3.3 Collaborate with the Softwoods Working Group to develop a formal position on the future of timber resources in the SVC region and use this to advocate to the State and Commonwealth governments for a National Timber Plantation Strategy to address current and future shortfalls in softwood timber production.
- 3.4 Work with the horticulture and viticulture industries to understand the changing nature and needs of these industries and inform strategic network planning to support them accordingly, for example, providing for future access by B-Triple and Quad-axle road freight vehicles.
- 3.5 Collaborate with RDA Murray, RDA Riverina, TAFE NSW, schools and industry leaders to commission a *Snowy Valleys Future Employment Study*. The study would research and identify existing industry skills gaps, emerging growth industries, the future of work, the estimated demand for the 'jobs of the future' and likely workforce needs and training priorities in the SVC region.



Theme 4: Support the Development of a Strong and Sustainable Tourism Sector in the Snowy Valleys

Rationale

The diversity of the natural environment and experiences on offer in the Snowy Valleys drives visitation to the region. Parts of the Snowy Valleys are located within the larger Australian Alps region and the area is a Western gateway to the Australian Alps including Mount Kosciuszko National Park and ski fields at Thredbo, Selwyn and Perisher Valley.

While it is the region's proximity to the Alps which underpins its tourism 'offer', the Riverina Murray Destination Management Plan highlights the fact that, to date, the development of supporting infrastructure and products within the region has been limited and is something that needs to be addressed.



Council-led Actions

- 4.1 Investigate needs and opportunities for short-term accommodation product development to serve the Snowy Valleys' visitor market.
- 4.2 Promote and facilitate access to the *NSW First* tourism workshops offered by Destination NSW to tourism operators to provide product development advice and industry resources to help grow the local tourism sector.
- 4.3 Undertake a scoping study for the development of a Regional Agritourism trail in the Snowy Valleys Council region.

Council-supported Actions

- 4.4 Collaborate with key agencies to implement the recommendations from the Snow Valley's section of the Riverina Murray Destination Management Plan, prioritising 'Tier 1' projects including: Brindabella Road upgrade and development of new touring route (Canberra); Snowy Valleys Way touring route repositioning and promotion; development of a Batlow Cannery Cidery Experience; further rail trail investment to position the Snowy Valleys as the rail trail region; and development of a Hume & Hovell Mountain Bike Track and Adventure Trail.
- 4.5 Collaborate with Destination NSW to undertake a review of current arrangements for the procurement, organisation and coordination of regional events. The review should focus on the adequacy of resourcing and support for events and identify opportunities to maximise visitation to the region, including during low periods, through a coordinated regional events calendar and the cross promotion of the whole region at individual events.

5. Realising Prosperity: Implementation Priorities and Monitoring

5.1 Project and Program Prioritisation Framework

While all the actions presented in this Economic Development Strategy are valid and worth pursuing, resource constraints mean it is impractical for Snowy Valleys Council and its partners to act on all of them immediately. This makes it necessary to prioritise opportunities for short to medium-term implementation. The prioritisation of opportunities for action is guided by two broad sets of assessment criteria – *benefit realisation* and *capacity to implement* as outlined below.

Benefit Realisation:

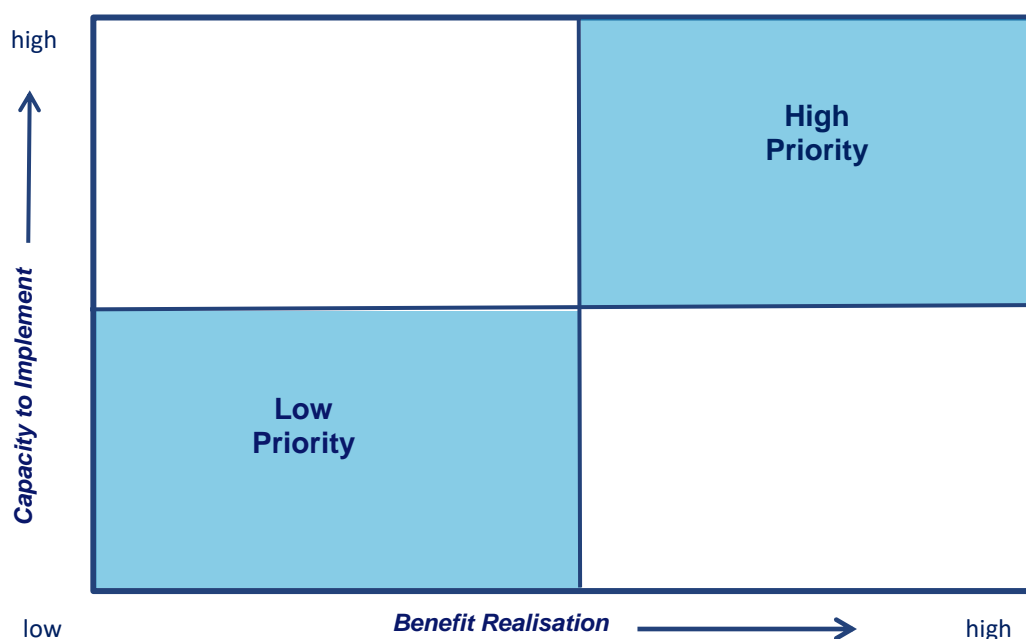
- What **benefits** will the project, program or activity deliver to the communities of the Snowy Valleys, its residents and businesses if realised?
 - Will it bring more business investment to the region? Is it the sort of investment that Council and the community wants?
 - Does it build on the SVC region's existing industry profile, capabilities and competitive advantages?
 - Will it help to create more jobs in key and emerging industry sectors such as the professional, scientific and technical services, advanced manufacturing, health care, education and the visitor economy?
 - Will it help to reduce leakages and retain and re-circulate more income in the region (through local income and expenditure multipliers)?
 - Are there other potential impacts (e.g. social, environmental, cultural) to consider? For example:
 - Enhancing urban liveability;
 - Higher quality recreational and cultural facilities; or
 - Improving quality of social support services.

Capacity to Implement:

- What is Snowy Valleys Council's **capacity to implement** the project or activity?
 - Does the opportunity align with Council's Community Strategic Plan?
 - Is it consistent with Council's community planning, land use planning and corporate planning policy objectives?
 - Does Council have the programs in place to support the opportunity?
 - Is the necessary support infrastructure available (or can it be realistically built/accessed)?
 - Does Council have the organisational capacity to implement the project or activity?
 - Does Council have the financial resources and the human resources?
 - Does Council have the political and community support (i.e. will the community accept and support the project or activity)?
 - Implementation - who is best placed to drive the opportunity? Is it Council as the lead, as a partner or is it the responsibility of other organisations (e.g. NSW or Federal Government) with support from Council?

Priorities are identified based on the application of the following broad set of assessment criteria, determining to what extent the opportunity in question concerned is a high, medium or low priority. Applying the assessment criteria and effectively 'rating' and 'ranking' each action determines those that are considered the highest priority and which, as a result, are short-term actions to be progressed over the next 18 months.

Figure 9. Economic Development Action Assessment Matrix



Source: SC Lennon & Associates

5.2 Priorities for Action – Informing an 18 Month Work Plan

Priority projects and activities for implementation are identified based on the application of the broad set of assessment criteria described above. From the long-list of 25 actions identified in this strategy, the following five are Council's priority actions to progressed over the first 18 months:

1. Prepare a **business case to support the upgrading of Brindabella Road** to support the safe and efficient movement of residents, workers and visitors to the Snowy Valleys Council region (Action 1.1).
2. Undertake a Snowy Valleys Council region **industrial land demand and supply study** to confirm existing capacity to accommodate growth and identify potential gaps in supply. As part of the study, collaborate with the Department of State Development to determine the need for a large-scale industrial estate in the Tumut area incorporating a transport and logistics hub (Action 1.4).
3. Collaborate with the NSW Government, local industry partners and the education and training sector to **establish the proposed Education and Business Centre of Excellence** in the Snowy Valleys (Action 2.1).
4. Undertake a **scoping and concept design study for a Softwood 'Centre of Excellence'** in the Snowy Valleys (Action 3.1).
5. **Investigate needs and opportunities for short-term accommodation product development** to serve the Snowy Valleys' visitor market (Action 4.1).

5.3 Collaborative Partnerships for Strategy Implementation

Collaborating to cultivate economic development partnerships is key to successful strategy implementation. *Preparing for Prosperity* will be implemented by Snowy Valleys Council in partnership with the NSW Government, the Australian Government, regional development bodies, business and industry and other supporting partners. Internal and external stakeholders will be continually engaged to ensure ownership of the strategy and a commitment to its implementation. To this end:

- Snowy Valleys Council will continue to collaborate with the Riverina, Riverina and Murray and Canberra Region Joint Organisations of Councils, NSW Department of Industry, NSW Department of Premier and Cabinet, RDA Riverina, RDA Murray and the region's chambers of commerce and progress associations to gain support for and to help deliver the Snowy Valleys Council Region Economic Development Strategy.
- Council will establish an annual ***Snowy Valleys Economic Development Futures Forum*** to re-affirm and build on the economic development directions and priorities for the SVC region. This will include the review, update and prioritisation of strategies and actions and involve Councillors and key external stakeholders.

Preparing for Prosperity: Snowy Valleys Council Region Economic Development Strategy, 2018-2022 has been prepared in the context of the role of economic development in Snowy Valleys Council's broader program of work and strategic objectives, and wider regional priorities. Led by the Division Manager Strategy and Place and Council's Economic Development Team, Snowy Valleys Council will monitor the progress of the Economic Development Strategy in order to achieve the actions set out.

Implementation progress will be monitored through the following methods and sources:

- Business surveys;
- Customer / visitor satisfaction surveys;
- Subscription to regularly updated and tailored data sources such as REMPLAN;
- Department of Jobs and Small Business data on unemployment and labour force trends; and
- Australian Bureau of Statistics (ABS) Business Register data.

Set performance measures will be reported annually within the performance monitoring on the implementation of the Economic Development Strategy. *Preparing for Prosperity: Snowy Valleys Council Region Economic Development Strategy, 2018-2022* will be reviewed annually with an update anticipated in four years.

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