

Orana Strategic Regional Plan

2023-2026





Welcome

The Orana region is the largest and most diverse region, covering an area of 25% of NSW. It serves a population of more than 123,000 people. We have a robust economy, anchored by both the agriculture and resources sectors, with an annual GRP of \$10.8B, \$21.3B in output and \$9B in regional exports.

Our region extends from Mudgee in the east to Bourke in the west. It comprises the local government areas of Bogan, Bourke, Brewarrina, Cobar, Coonamble, Dubbo Region, Gilgandra, Mid-Western Region, Narromine, Walgett, Warren and Warrumbungle.

We are a region going through significant change. We are home to NSW's first Renewable Energy Zone and Australia's and NSW's Critical Mineral Hub. We have \$20B in projects announced across the region, including expansions by existing companies and several new projects.

In developing this strategy, RDA Orana has relied on feedback from our many stakeholders and several workshops and surveys undertaken over the past year. We've crunched data and reviewed and incorporated aspects from various community, regional and State government plans.

Brad Cam
Chair

RDA Orana holds a unique position - we are the only organisation in the region to look across the entire region, seeing the needs across all industries and all projects and the opportunities for regional infrastructure beyond local government boundaries.

In preparing the Orana Strategic Regional Plan, we've focussed on the "pockets" that we're good at, that no one else is looking at, or that will significantly impact the region.

To achieve real impact from the \$20B in projects announced for the region, we recognise that we have significant challenges that include:

- creating opportunities for itinerant contractors and workers to invest and settle in the region on a permanent basis
- facilitating collaborative solutions for housing
- improving transport efficiencies and linkages
- increasing educational opportunities to support the industries developing in the region and
- working with our local Government partners to ensure we create places that are attractive to future generations.

The Orana Strategic Regional Plan consolidates the work the organisation has been undertaking to support the development of our region. We commend the plan to you and encourage our stakeholders to engage with us, as we grow the region together,

Megan Dixon
CEO & Director of Regional Development



Our vision

A regional powerhouse recognised for production, value-adding, collaborations and entrepreneurship.

Our mission

Leverage our regional intelligence and industry connections for greater regional prosperity.

How will we know we've succeeded?

- ✓ Increased regional economic output
- ✓ Increased investment into existing businesses
- ✓ The attraction of new businesses
- ✓ The attraction and retention of the regional workforce (and population)

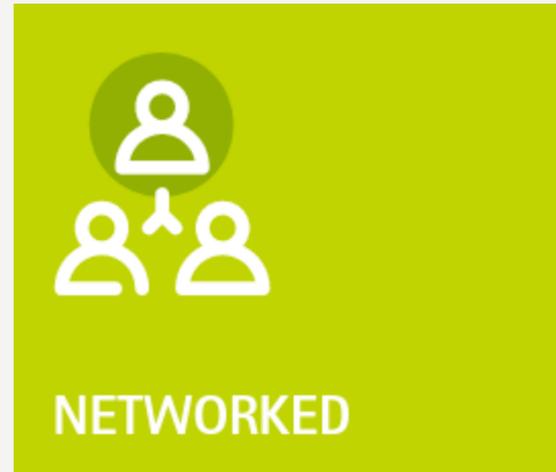


OUR APPROACH

TENACIOUS
NETWORKED
PROACTIVE
COLLABORATIVE
ENTREPRENEURIAL



Tenacious
Economic development, investment attraction and change doesn't happen overnight. We have the strength and persistence to absorb setbacks, while applying consistent and purposeful actions towards achieving our long-term objectives.



Networked
We are ideally placed to facilitate strategic links between business and across supply chains to maximise efficiencies, productivity and profitability of our stakeholders. We listen and respond to stakeholder needs and use aggregated information to advocate for positive change for our region.



Proactive
We use our regional intelligence to look forward, anticipating change and opportunities for our region. We collaborate, innovate, make decisions, and execute with speed and agility. Our constant pursuit of solutions makes a difference to the region we support.

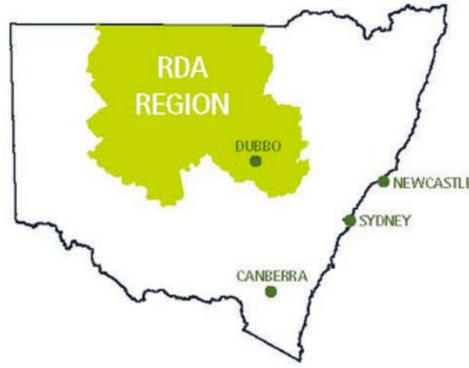


Collaborative
We collaborate inside and outside the organisation to maximise our shared knowledge and bring greater value to one another and most importantly, to our region.

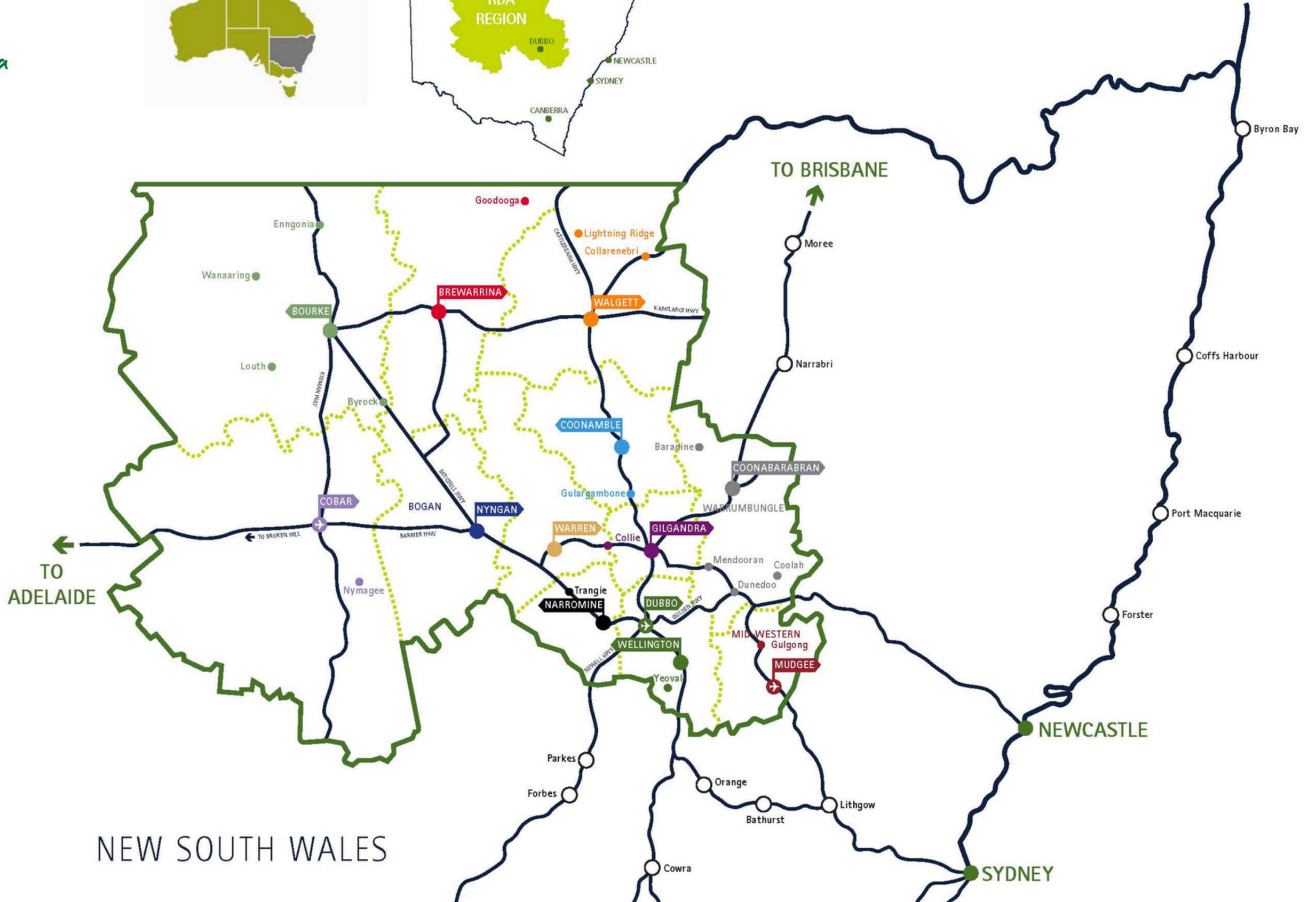


Entrepreneurial
Curiosity and the pursuit of insights fuel our productivity, and innovation drives our business. We boldly champion new, innovative and breakthrough ideas, while attentively managing risks.

RDA Orana



- Bogan Shire Council
- Bourke Shire Council
- Brewarrina Shire Council
- Cobar Shire Council
- Coonamble Shire Council
- Dubbo Regional Council
- Gilgandra Shire Council
- Mid-Western Regional Council
- Narromine Shire Council
- Walgett Shire Council
- Warren Shire Council
- Warrumbungle Shire Council

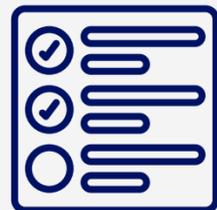


Regional Snapshot

Key Statistics*



12 Local
Government Areas



\$20B
Projects



13,326
Businesses



123,737
People



54,887
Jobs



\$10.4B
GRP



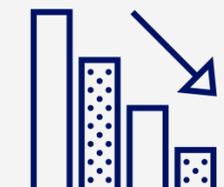
\$21.3B
Output



2.6M
Visitors



4.4 M
Visitor Nights



3.9%
Unemployment



RDA Orana

*Pre COVID19

Regional Snapshot

Key Statistics*



Largest employing industry:
Health Care & Social Assistance
15.4%



Mining is Orana RDA's largest
output generating sector
29.3%
It's also our largest exporter (\$5.84B)



Growth sectors:

1. Health Care & Social Assistance
2. Construction
3. Mining
4. Education & Training
5. Public Administration & Safety
6. Manufacturing
7. Accommodation and Food Services
8. Electricity, Gas, Water and Waste
9. Transport, Postal & Warehousing





Opportunity Sectors



Health Care &
Social Assistance



Resources
and Energy



Manufacturing



Construction



Education &
Training



Liveability



Transport



Visitor
Economy



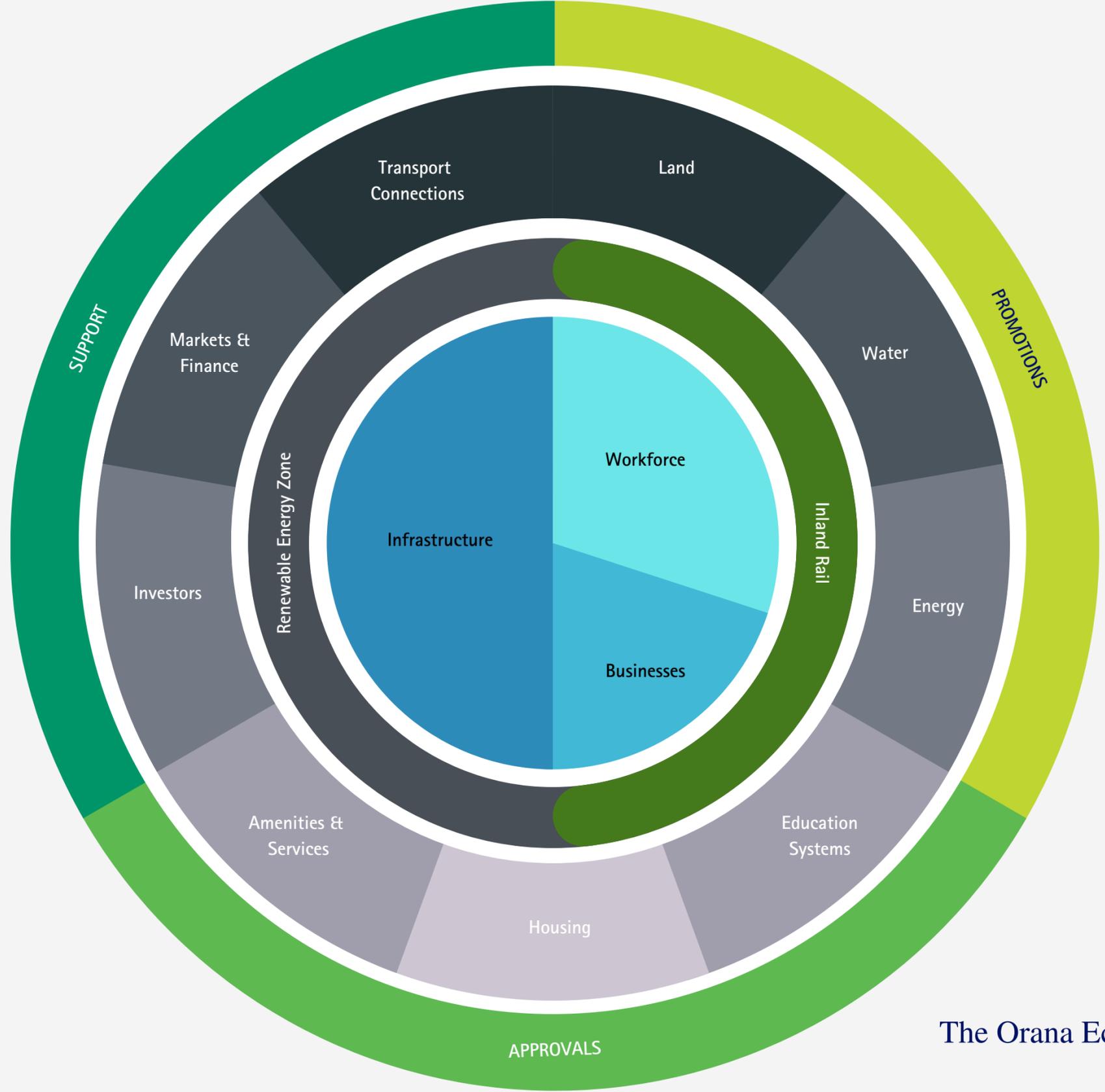
Agriculture





The Supporters - In region

- Regional NSW
- Transport NSW
- Energy Co
- Aboriginal Affairs
- RDA Orana
- Inland NSW Growth Alliance
- NSW Lands Council
- National Indigenous Australians Agency
- Inland Rail
- 12 x LGAs
- Dubbo Chamber of Commerce
- Business Mudgee
- Coonamble Chamber of Commerce
- Cobar Chamber of Commerce
- Coonabarabran Chamber of Commerce
- The Exchange
- TRRA
- Murdi Paaki
- REDi
- Rural Financial Counsellors



The Supporters - Remote

- Business NSW
- NSW Mining Council
- Destination NSW
- Destination Country & Outback NSW
- AusIndustry
- Austrade/Trade Start
- Entrepreneurs Program
- Regional Australia Institute
- Biz HQ
- Indigenous Business Australia
- Supply Nation
- Many Rivers

The Orana Economic Development Ecosystem





Health Care and Social Assistance

Key Statistics

- Population 123,737
- Annualised population growth of 0.6%
- 14.9% of the population Aboriginal identified
- Growing migrant community
- 5.7% of the population has need for assistance
- Median age – 41 years
- Labour Force participation rate – 55.52%
- Median weekly income – \$749 (\$39,007 pa)

Push

- Population decreasing in 9 of 12 LGAs
- Aging population
- inability to fill positions
- Climate change impacts on population
- Limited transport options in many areas
- Housing choice and quality, and affordability are limited in most areas
- Low levels of rental availability
- Health services stretched in some areas
- Shopping choices are limited in some areas

Pull

- Increased investment in NDIS
- Changing characteristics of the population
- Government strategies to enhance livability
 - Net zero targets
 - Streets as shared spaces
 - Pathway projects
 - Response to Regional NSW Health Inquiry
 - Rural air transport subsidies
 - Health infrastructure building projects

Key strategies

- Advocate for innovation in housing options to meet community and industry demands. eg flexible designs, tiny house approvals, co-operative housing models.
- Continue active engagement in government and community driven consultation and planning forums to articulate regional needs and identify strategic opportunities for RDA Orana.
- Provide fee-for-service support to Councils and regional organisations to secure funding via grant writing, research etc.
- Provide migration service
- Support activities and organisations working towards strengthening the diversity of our region including expanding our opportunities with the First Nations community.
- Opportunity to develop Dubbo Regional Airport precinct to provide not only economic outcomes, but liveability outcomes via RFDS and Emergency services expansion.





Resources and Energy

Key Statistics

- Population 123,737
- Annualised population growth of 0.6%
- 14.9% of the population Aboriginal identified
- Growing migrant community
- 5.7% of the population has need for assistance
- Median age – 41 years
- Labour Force participation rate – 55.52%
- Median weekly income – \$749 (\$39,007 pa)

Push

- Decarbonisation and climate change agenda
- Need for water security
- Changing needs for resources from fossil fuels to critical minerals and rare earths
- Critical minerals are a key enabler for a range of global and domestic industries, including advanced manufacturing, renewable energy, defence, aerospace, battery storage, automation and electric vehicles.
- Competing land use needs

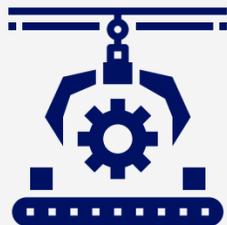
Pull

- Increasing demands for renewable energy and responsibly sourced critical minerals and high-tech metals
- Development of the critical minerals hub
- Creation of the Central West Orana REZ
- Demand for water for industry
- Access to reliable low-cost energy
- Industry innovation

Key strategies

- Develop supply chain opportunities to support primary investment in REZ and strategic mineral resource recovery
- **Work with partners to facilitate access to enabling infrastructure (transport, energy, water & workers)**
- **Work with Councils and Industry to identify opportunities to expand freight and logistics operations in the region**
- Invest in the development of an industry capability directory
- Promote confidence and investment in the region
- With partners, develop and host NSW Resources & Energy Week in the region





Manufacturing

Key Statistics

- Robust industry in the region with an emphasis on agriculture and food manufacturing
- Opportunity to leverage major projects

Push

- Strategic minerals development in the region
- Inland rail development in the region
- Growth of existing manufacturers in the region
- Changing market demands: e.g.: growth in protein food products; growth in goat consumption
- Transport restrictions/costs causing increased local manufacturing/value-adding of raw materials
- Supply chain disruptions
- Shortage in workers, resulting in increased automation

Pull

- Development of an advanced manufacturing hub in Narromine
- Growing demand for Australian food
- Existence of major manufacturers in the region already
- Growing demand for products manufactured onshore
- Support from State and Federal Governments for industry investment
- Circular economy

Key strategies

- **Work with partners to increase supply chain knowledge about opportunities (goat production, protein varieties, etc)**
- Support partners to identify and develop value-adding opportunities in the region, with a focus on the REZ, critical minerals hub and agriculture
- Develop clusters through the inland growth alliance to support innovation and collaboration in the resources, energy and ag sectors
- Investigate the development of the zero innovation hub to support circular and advance manufacturing in the region





Construction

Key Statistics

- Driven by project pipeline and demand for housing
- 4655 jobs and growing
- \$2.3B in output
- Importing \$676M annually
- Exporting \$314M annually

Push

- Major projects such as Inland Rail, Renewable Energy Zone, Dubbo Bridge and Mine expansions
- Growth of Dubbo and Mudgee as major urban centres
- Need for key worker housing across the region
- Shortage of contractors and labourers

Pull

- Robust housing markets across the region
- Changes in demand for types of housing across the region (higher density, aged care, smaller lots)
- Changes to land use for LALCS to support economic development

Key strategies

- Opportunities for innovative designs which can adapt as needed as community needs and demographics change eg. housing that can accommodate single-parent family, and then adapt to provide for the elderly or persons with a disability.
- Opportunity for changes to local, regional and state regulations re housing types such as tiny homes, granny flats, temporary constructions etc.
- Opportunity for collaboration between Council, business and LALCs with changes to land use regulations to develop housing or aged care.
- RDA growth in capacity to complete fee-for-service work including grant submissions and research to support applications for construction projects.
- Implementation of the NSW Regional Housing Plan may provide partnership opportunities for local businesses and Councils.





Education and Training

Key Statistics

- Growth sector: 5,422 jobs and growing
- An increasing number of trainee and apprenticeship roles

Push

- Lack of opportunities for local face-to-face training
- Teacher shortage/quality of education in rural centres
- Regional training for technical skills such as engineering, mineralogy, and geology to support mining, energy, manufacturing, and construction industries
- Staff shortage in a range of sectors
- Unemployment rates high in particular cohorts, including youth

Pull

- Growth and emerging industries need trained and qualified staff
- Growing demand from migrants choosing to live in the region, wanting access to CRICOS courses
- Growing population in Dubbo and Mudgee
- Roll of child care and preschools to enable work hours

Key strategies

- Work with universities and RTOs to increase presence and offer courses to support the regional engine and emerging industries
- Facilitate collaboration between government, education and training services, and industry to identify and prepare for new skills development that may be required
- Seek opportunities such as the Driving Change Developing Champions project to support job growth in the region
- Support DRNSW place-based Pathways Project in Walgett focussing on Education and Employment outcomes for young people
- Facilitate investment in training and education across the region





Visitor Economy

Key Statistics

- Growth sector: 5,422 jobs and growing
- An increasing number of trainee and apprenticeship roles

Push

- Amazing natural assets
- Impacts of disasters such as droughts, floods and fire
- Macroeconomic factors out of industry control, such as pandemics that impact visitor numbers
- Cost of living pressure impacting visitor numbers
- Limited transport options in the region
- Varied quality and quantity of visitor services such as accommodation and food, across the region
- Demand for beds in the region

Pull

- Growing demand for domestic tourism
- Growing demand for nature, adventure and cultural experiences
- Destination NSW push to develop new commercial product
- Significant sporting events in the region

Key strategies

- Provide Fee-for-service for Councils and organisations for grant writing, research etc to support applications for funding to deliver on tourism-related projects, including infrastructure opportunities
- Explore opportunities to support First Nations organisations and individuals to develop regional cultural tourism businesses.
- Work with partners to facilitate and promote investment opportunities for the development of tourism accommodation in the region



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