

Unleashing Our Opportunities:
Armidale Region Economic Development Strategy, 2017-2025



Unleash the opportunities

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Acknowledgements

Armidale Regional Council acknowledges the Traditional Owners of the land within the Armidale Regional Council local government area. We pay respect to Elders past, present and future and value the traditions, cultures and aspirations of the First Australians of this land. We acknowledge and hold in great significance the valuable contribution that Traditional Owners have made and continue to make to the communities of the Armidale Region and remind people that we live and work on Aboriginal land.

Aboriginal and Torres Strait Islander people should be aware that this document may inadvertently contain images of people who have since passed away.

Armidale Regional Council thanks and acknowledges all members of the Regional Growth Advisory Committee for their valuable contributions to the development of *Unleashing Our Opportunities: Armidale Region Economic Development Strategy, 2017-2025*.

Council also acknowledges consultancy firm SC Lennon & Associates for its role in preparing this Economic Development Strategy.



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Executive Summary

A Blueprint for Prosperity

Unleashing Our Opportunities: Armidale Region Economic Development Strategy, 2017-2025 is a blueprint for enhancing the vibrancy, diversity and sustainability of the Armidale Region's economy and its influence on the liveability of the local government area as a whole.

Informed by research, analysis and stakeholder consultation, *Unleashing Our Opportunities* provides Armidale Regional Council, as its custodian, with a clear vision and plan of action to promote, facilitate and co-ordinate economic development programs and projects to the year 2025.

Boasting a strong and diverse economy, a population of around 30,000 and almost 12,120 jobs, the Armidale Region has experienced a healthy rate of growth in recent years. The region is on the cusp of significant growth and prosperity, and prospects for continued economic development are strong.

The Armidale Region's future prosperity will be underpinned by innovation in traditional sectors of employment, new business investments and opportunities to develop the region's 'knowledge-based' industries.

The Armidale Region has a highly-educated workforce, 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 region is well-placed to attract prospective investors, businesses and residents looking for a sophisticated rural or small-city lifestyle with a diversity of working and living opportunities.

Recognising that the private sector (industry) drives economic development, *Unleashing Our Opportunities* is a plan of action to help nurture the foundations for prosperity – like strategic infrastructure, access to employment and places where industry can invest and do business.

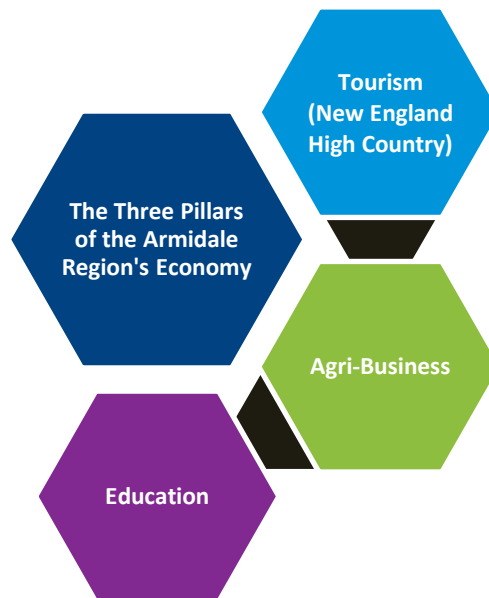
Capitalising on Competitive Advantage

Unleashing Our Opportunities is a plan of action to capitalise on the Armidale Region's traditional strengths in agriculture and its evolving agri-business capabilities. It recognises and responds to the region's potential to develop into a premium regional destination for tourism and events and to capitalise on the strength and profile of its education and training sector.

The strategy capitalises on those industry sectors which drive the Armidale Region's economy, being: **Agri-business**; **Tourism**; and **Education**. These are the three 'pillars' of the Armidale regional economy.

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

The Armidale Region's Economic 'Pillars'



Source: SC Lennon & Associates

Unleash the Opportunities: A Vision of Economic Prosperity

Unleashing Our Opportunities articulates the vision for the Armidale Region's economic development, to capitalise on its place on the cusp of significant growth and prosperity.

Unleash the Opportunities ***Armidale Region Economic Development Vision 2025***

The Armidale Region is Australia's premier location for technology-driven agri-business in livestock and horticulture, a premium visitor destination and a location of choice for innovative and globally-connected 'knowledge-based' businesses enjoying a vibrant city-region lifestyle.

The vision is supported by Armidale Regional Council's economic development charter.

Armidale Regional Council's Economic Development Charter

In supporting innovation, diversification and growth of the Armidale Region's existing businesses and through its efforts to attract new private sector investment to the region, Armidale Regional Council:

1. Prioritises initiatives that support innovation and development of the region's **key sectors in education, health and wellbeing, horticulture, agribusiness 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-based' industries** in education, health and wellbeing, horticulture, food processing, renewable energy, agribusiness and knowledge-based business services.

3. Proactively promotes **a partnership approach to tourism development**, working in collaboration with the tourism industry and other tiers of government to enhance regional branding, signage, marketing, product development, activity centre revitalisation, visitor servicing and support infrastructure.
4. Pro-actively engages with the Armidale Region's **micro, small-to-medium and large businesses** to address shared challenges and opportunities for business investment, innovation, growth and development.
5. **Promotes Armidale, Guyra and the wider region to prospective investors**, using a strategic, informed and targeted approach consistent with the vision for the region's economic development.

A Plan of Action to Promote Economic Development

By providing a strategic framework for Armidale Regional Council – as the lead and in partnership with others – to help secure a sustainable and prosperous future for the Armidale Region *Unleashing Our Opportunities* contains four strategy themes or 'action areas' as illustrated below.

Unleashing Our Opportunities: Economic Development Strategy Themes



Each theme in the Strategy represents an area of strategic intent. The strategic objective statement for each theme, is articulated as follows.

Unleashing Our Opportunities: Economic Development Strategy Themes and Strategic Objectives

Theme 1: A Region of Choice for Smart and Sustainable Agri-business

Capitalise on the Armidale Region's competitive strengths in technology-driven agri-business in livestock and horticulture by establishing an agri-tech 'cluster' focusing on the benefits that flow from networked businesses, institutions and agencies sharing information, ideas, infrastructure and services.

Theme 2: A Globally-connected 'Knowledge Region'

Capitalise Establish the Armidale Region as a location of choice for 'knowledge workers', entrepreneurs and major innovative businesses seeking a sophisticated, family-friendly city-region lifestyle.

Theme 3: A Skilled Workforce and Dynamic Regional Business Sector

Collaborate with industry, the education and training sector and other tiers of government to enhance the Armidale Region's skills base and to support the growth of the region's innovative, productive and prosperous micro, small-to-medium and large businesses.

Theme 4: A Premium Regional Visitor Destination for Tourism and Events

Deliver a collaborative and co-ordinated approach to tourism promotion and development to establish the Armidale Region as a premium regional destination for tourism and events.

The economic development action plan contains 51 individual actions categorised under the four strategic themes accordingly. The majority of actions will be 'Council-led', in that they involve specific tasks for Armidale Regional Council and an allocation of human, physical and financial resources.

Implementation Priorities

Unleashing Our Opportunities presents priority projects and activities for implementation as part of a Year 1 economic development work plan. They reflect priorities that Armidale Regional Council will advance (in association with identified partners where relevant) as short-term priorities. The priorities for implementation (in no particular order) are:

- Collaborate with UNE, the NSW Department of Industry and the Office of Regional Development to formally establish an agri-tech cluster linked to the Armidale Region's industry and research strengths and capabilities in agriculture, controlled environment horticulture, agribusiness, veterinary health and related capabilities (Action 1.1).
- Collaborate with UNE, the NSW Department of Industry and the Office of Regional Development to establish a business case and prospectus to attract private sector investment to expand controlled environment horticulture in the Armidale Region (Action 1.2).
- Facilitate partnerships between Armidale Regional Council and other key stakeholders to progress implementation of the Armidale Regional Airport Masterplan with a focus on development of the new and upgraded runway as a priority (Action 2.1).

- Engage with the major airlines to secure more flights to Armidale (Action 2.2).
- Prepare a business case for the Armidale Regional Airport Employment Precinct to accommodate light industry and secure funding for its development (Action 2.3).
- Implement the Armidale Central Mall Vibrancy Plan (Action 2.4).
- Prepare a business case to secure funding for the upgrade of the UNE Bellevue Stadium to cater for a crowd capacity of 5,000 to 10,000 and accommodating 'A-grade' Rugby Union, Rugby League and other State and national sporting events (Action 2.9).
- Articulate and promote the Armidale Region's competitive advantages including its world-class communications infrastructure (the NBN), Armidale Regional Airport and its strategic location between Brisbane and Sydney. This information should feed directly into an investment attraction strategy and prospectus (Action 2.14).
- Support the UNE business incubator program and the proposed agri-tech cluster (see Action Area 1) to encourage innovation for start-up businesses which is accessible for all entrepreneurs in the Armidale Region (Action 3.3).
- Collaborate with the Armidale Region's service providers to review and assess ongoing initiatives to address youth and Indigenous youth unemployment and disengagement. In light of the review, prepare a regional strategy to renew and extend key initiatives using information acquired from the latest 'best practice' case studies (Action 3.12).
- Prepare a sports tourism strategy to plan for new sporting facilities and facility upgrades to accommodate the growth and development sports tourism in the Armidale Region (Action 4.1).
- Undertake a feasibility study and prepare a full business case for the New England Rail Trail Project (Action 4.2).
- In line with the completed masterplan, prepare a feasibility study and business case for the Dumaresq Recreational Dam Development Project (Action 4.3).
- Prepare a concept plan / master plan for the revitalisation and development of the Mother of Ducks Lagoon Recreational Area (Action 4.4).

In progressing these priorities, monitoring progress will be key.

Economic Development Strategy Outcomes

Unleashing Our Opportunities: Armidale Region Economic Development Strategy, 2017-2025 will be implemented by Armidale Regional Council in partnership with the NSW Government, the Australian Government, business and industry bodies including the Armidale Guyra Business Alliance and other supporting partners across the region.

In addition to key performance measures shown for each of the four action areas in this strategy, *Unleashing Our Opportunities* supports the achievement of the region's desired economic outcomes being:

- A \$1.5 billion Armidale Region economy by 2025 (which represents a 10 per cent increase in the size of the region's economy over eight years).
- An increase in the Armidale Region's population from 30,000 to at least 35,500 by 2025.
- 14,500 local jobs by 2025 (up by approximately 10 per cent from 13,200 in 2016).
- Inter-regional exports that account for 65 per cent of the Armidale Region's GRP (currently around 55%).

Economic development strategy performance measures will be reported every year in line with the implementation priorities of the Economic Development Strategy.

Progress on the implementation of *Unleashing Our Opportunities* will be assessed annually with a full review and update of the Strategy anticipated in four years.

1. *Unleashing Our Opportunities: A Blueprint for Prosperity*

1.1 Economic Development Strategy Purpose and Planning Framework

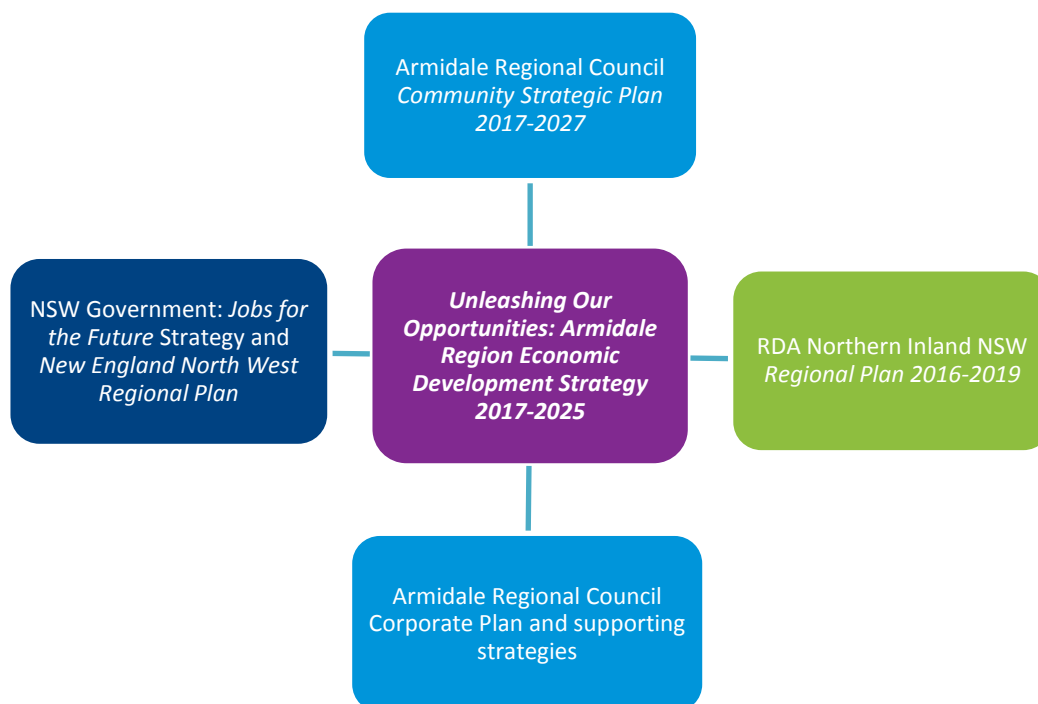
Unleashing Our Opportunities: Armidale Region Economic Development Strategy, 2017-2025 is a blueprint for enhancing the vibrancy, diversity and sustainability of the Armidale Region's economy and its influence on the liveability of the local government area as a whole.

Informed by research, analysis and stakeholder consultation, *Unleashing Our Opportunities* provides Armidale Regional Council, as its custodian, with a clear vision and plan of action to promote, facilitate and co-ordinate economic development programs and projects to the year 2025.

Aspirational, informed and action-oriented, *Unleashing Our Opportunities* addresses challenges and opportunities for economic development in the context of Armidale Regional Council's broader program of work and strategic objectives as documented in its Corporate Plan and the aspirations of the community as articulated in the *Community Strategic Plan 2017-2027*.

Regional in scope and global in its outlook, *Unleashing Our Opportunities* aligns with the broader economic development objectives of Regional Development Australia's *Northern Inland NSW Regional Plan 2016-2019*, the NSW Government's *Jobs for the Future Strategy* and the *New England North West Regional Plan 2036*.

Figure 1 - Armidale Region Economic Development Planning Framework



1.2 A Strategy to Enable and Promote Economic Development

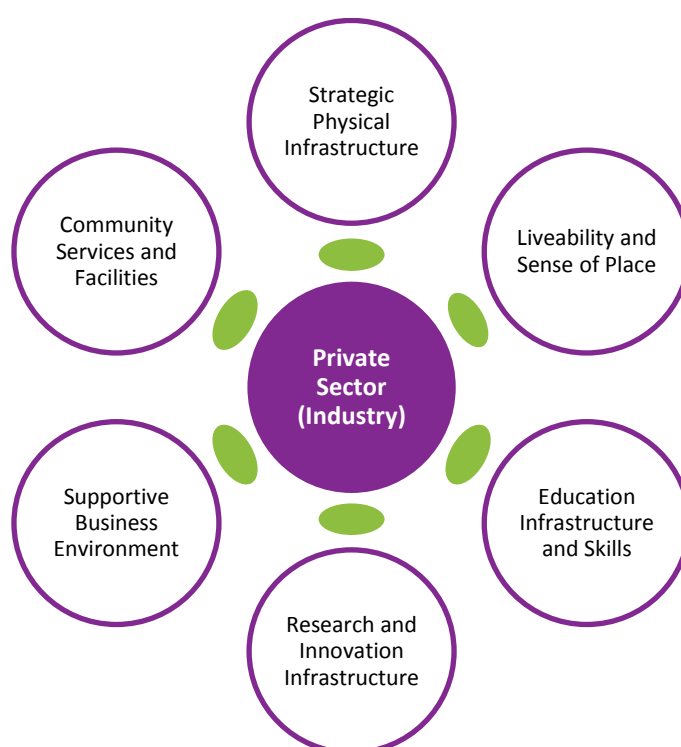
Recognising that the private sector (industry) drives economic development, *Unleashing Our Opportunities* is a plan of action to help nurture the foundations for prosperity – like strategic infrastructure, access to employment and places where industry can invest and do business.

The economic development enablers include key infrastructure, such as transport networks, appropriately zoned land, the form and function of the Armidale Region's towns and activity centres, as well as community services and facilities such as local libraries and aged care services.

They also include the Armidale Region's 'lifestyle' attributes - including its premier 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.

Figure 2 – The Driver and Enablers of the Armidale Region's Economy



Source: SC Lennon & Associates

Enablers which Armidale Regional 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, education infrastructure, research and innovation infrastructure and a supportive regional planning framework.

1.3 Informing a Strategic Approach

The Armidale Region's Industry and Employment Profile

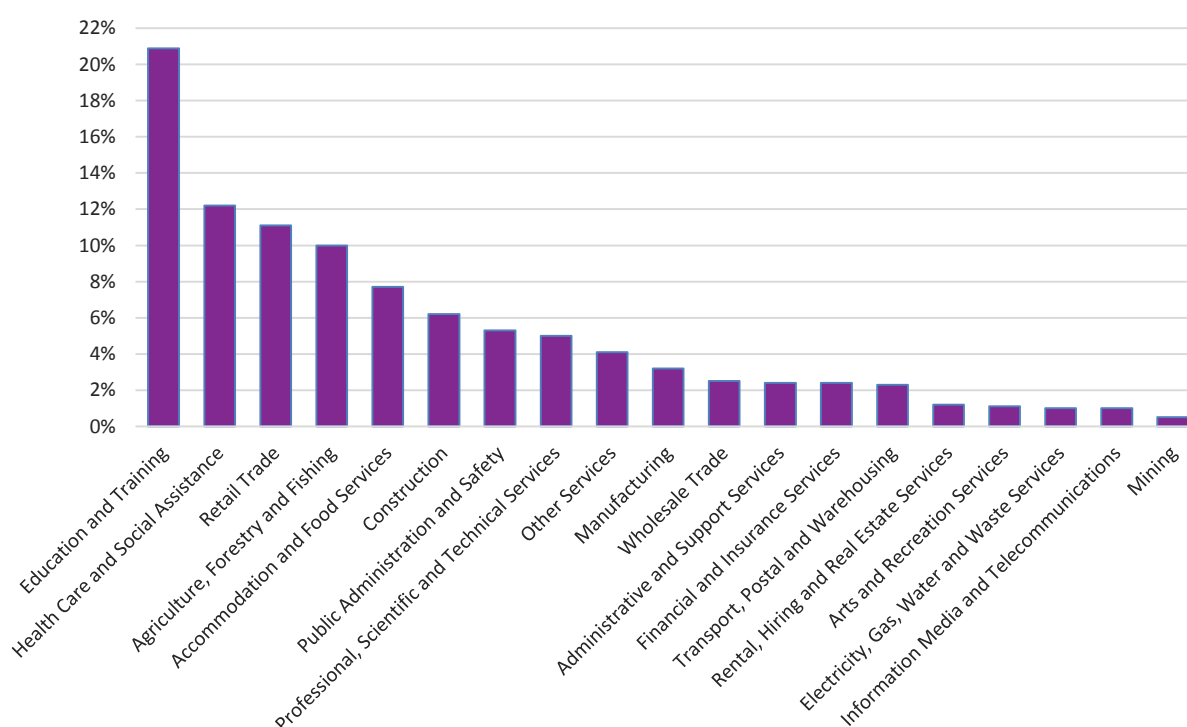
Boasting a strong and diverse economy, a population of around 30,000 and almost 12,120 jobs, the Armidale Region has experienced a healthy rate of growth in recent years. The region is on the cusp of significant growth and prosperity, and according to the NSW Department of Planning & Environment, the Armidale Region's population is expected to increase to around 35,200 by 2026.

Prospects for continued economic development are strong, based on innovation in traditional sectors of employment, new business investments and opportunities to develop the region's 'knowledge-based' industries.

The Armidale Region has a highly-educated workforce, 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 region is well-placed to attract prospective investors, businesses and residents looking for a sophisticated rural or small-city lifestyle with a diversity of working and living opportunities.

The Armidale Region also has its challenges including pockets of social disadvantage and unemployment for some segments of the population. The unemployment rate in the Armidale Region, at 6.2%, sits above the comparable rates for Regional New South Wales (5.5%), New South Wales (5.1%) and Australia (5.7%) (Department of Employment, March 2017).

Figure 3 - Employment by Industry (%), Armidale Region, 2015/16



Source: economy.id and NIEIR (2016) with interpretations by SC Lennon & Associates

The Armidale Region's Economic 'Pillars'

The Armidale Region's largest employers include the education and training sector, health care, retail trade, agriculture and the accommodation and food services sector. The industry sectors which drive the region's economy in terms of regional exports, employment and industry value-added include: Agri-business; Tourism; and Education. These are the three 'pillars' of the Armidale regional economy.

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

Figure 4 - The Armidale Region's Economic 'Pillars'



Source: SC Lennon & Associates

Unleashing Our Opportunities is about capitalising on the Armidale Region's comparative and competitive advantages, leveraging local strengths and attributes to help realise the region's opportunities for growth and prosperity.

Unleashing Our Opportunities provides a plan of action to capitalise on the Armidale Region's traditional strengths in agriculture and its evolving agri-business capabilities. It recognises and responds to the region's potential to develop into a premium regional destination for tourism and events and to capitalise on the strength and profile of its education and training sector.

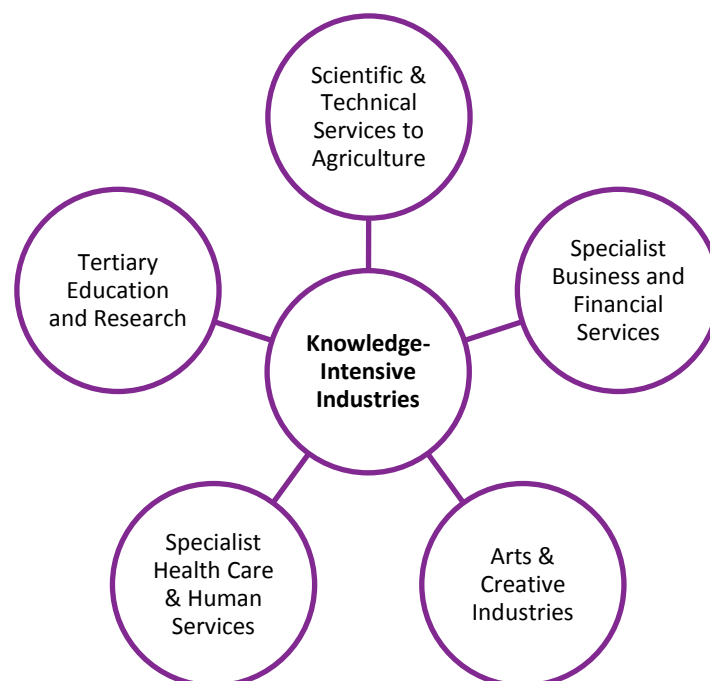
The emergence of knowledge and information as critical enablers of economic development and as economic drivers in their own right underpins *Unleashing Our Opportunities*. With an emphasis on the identification of new industry opportunities and activities to attract investment, the strategy also highlights the many opportunities to grow the Armidale Region's existing business base.

The Armidale Region's Transition to a 'Knowledge Economy'

Australia's economy is becoming more dependent on ideas and problem-solving, with the largest increase in jobs in Australia being those that require higher-level qualifications. The transition towards a 'knowledge economy' has been driven by globalisation and a re-organisation of business, with enterprises and individuals becoming specialised through the outsourcing of non-core business functions assisted by the use of new and constantly evolving digital technologies.

Those industries with a relatively high 'knowledge content' and which present opportunities for growth in the Armidale Region based on existing comparative advantage, include education and training, specialist health care and wellbeing and scientific and technical services to agriculture (agri-business services). This includes specialist agriculture-related research and technology industries and renewable energy technology industries.

Figure 5 - Broad Categorisation of Knowledge-Intensive Industries



Source: SC Lennon & Associates

The tertiary education sector is at the frontier of the knowledge economy and Armidale is home to one of Australia's leading tertiary education and research institutions in the University of New England (UNE). Synergies between UNE's rural technology R&D capabilities, local business capabilities in agri-business and agri-tech, and locally-based government departments with a focus on agriculture and veterinary health, provides the impetus for an 'agri-tech' cluster to establish in Armidale, underlying the Armidale Region's transition to a 'knowledge region'.

This transition also presents opportunities for the region to attract 'footloose' knowledge-intensive businesses and individual entrepreneurs in a range of industries including, for example, business services like financial and legal services and the creative industries, particularly creative services like architecture and design, communications and marketing and digital content.

1.4 Unleash the Opportunities: A Vision of Economic Prosperity

Unleashing Our Opportunities articulates the vision for the Armidale Region's economic development, to capitalise on its place on the cusp of significant growth and prosperity.

Unleash the Opportunities
Armidale Region Economic Development Vision 2025

The Armidale Region is Australia's premier location for technology-driven agri-business in livestock and horticulture, a premium visitor destination and a location of choice for innovative and globally-connected 'knowledge-based' businesses enjoying a vibrant city-region lifestyle.

The vision is supported by Armidale Regional Council's economic development charter.

1.5 Armidale Regional Council's Economic Development Charter

The economic development charter describes Armidale Regional Council's commitment to promoting, facilitating and co-ordinating economic development activities.

In supporting innovation, diversification and growth of the Armidale Region's existing businesses and through its efforts to attract new private sector investment to the region, Armidale Regional Council:

1. Prioritises initiatives that support innovation and development of the region's **key sectors in education, health and wellbeing, horticulture, agribusiness 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-based' industries** in education, health and wellbeing, horticulture, food processing, renewable energy, agribusiness and knowledge-based business services.
3. Proactively promotes **a partnership approach to tourism development**, working in collaboration with the tourism industry and other tiers of government to enhance regional branding, signage, marketing, product development, activity centre revitalisation, visitor servicing and support infrastructure.
4. Pro-actively engages with the Armidale Region's **micro, small-to-medium and large businesses** to address shared challenges and opportunities for business investment, innovation, growth and development.
5. **Promotes Armidale, Guyra and the wider region to prospective investors**, using a strategic, informed and targeted approach consistent with the vision for the region's economic development.

Guided by its economic development charter and the action plan presented in this strategy, Armidale Regional Council provides the enabling environment to help facilitate the competitiveness and success of the region's businesses and industries across all sectors of the economy.

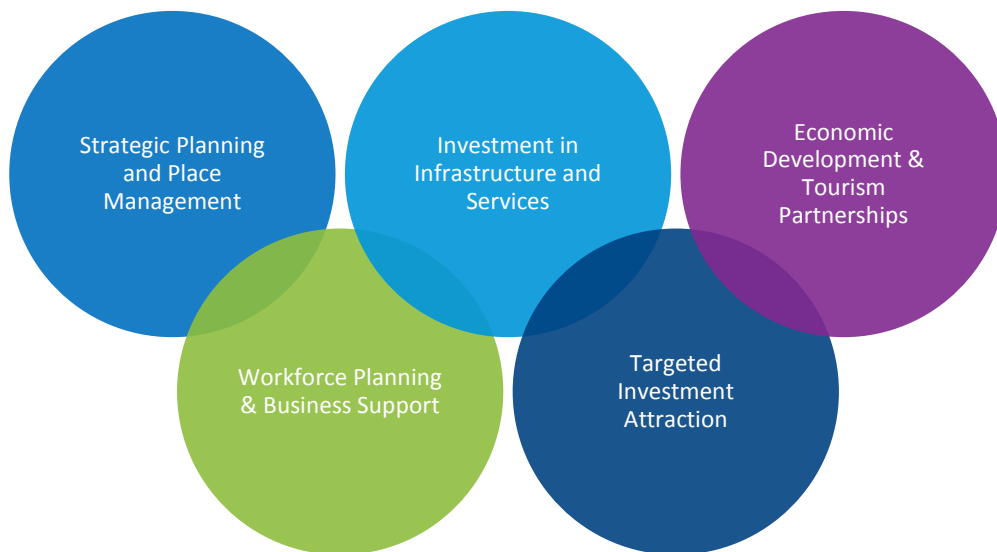
1.6 A Plan of Action to Promote Economic Development

Unleashing Our Opportunities focuses on Armidale Regional Council's 'core' economic development functions and activities, through a plan of action to attract investment and grow the Armidale Region's existing business and industry base.

Through *Unleashing Our Opportunities*, there are five general areas where the economic development actions of Armidale Regional Council are pursued. These are:

1. **Targeted Investment Attraction** - Investment is fundamental to economic development, and access to international, national and regional markets is a key determinant of sustainable economic growth. Armidale Regional Council will continue to help facilitate private sector investment by promoting what the region has to offer prospective investors. Council also works hard to attract government investment in strategic infrastructure. It does this through the identification of regional priorities (as articulated in this Economic Development Strategy) and then preparing business cases to inform both Council and other government funding support for key projects.
2. **Workforce Planning and Business Support** - Local enterprise often presents the greatest potential to take advantage of new investment opportunities and a successful investment enhancement strategy encourages additional investment from business and industry already located in the Armidale Region. To succeed, businesses need access to workers with appropriate skills. Armidale Regional Council will continue to liaise with business and industry, representative organisations such as the Armidale Guyra Business Alliance and the region's education and training providers to network ideas and articulate workforce planning priorities that need to be addressed.
3. **Strategic Planning and Place Management** - Armidale Regional Council will continue to work to ensure the region's strategic planning policies and activities respond to the region's economic needs and opportunities. It will continue to undertake the studies and research necessary to identify, for example, the region's retail and commercial floorspace capabilities and requirements, so it knows what the region can or cannot accommodate in future and then plan appropriately for that. Central to Council's efforts to support economic development and the liveability of the Armidale Region is investment in the revitalisation and development of the Armidale CBD and Guyra town centre.
4. **Investment in Infrastructure and Services** - Armidale Regional Council is committed to nurturing the foundations for prosperity – like strategic infrastructure, community services and facilities, access to employment and places where industry can invest and do business. It plans for and provides those critical infrastructure items that fall under Council's control and pro-actively develops the business case for those items that fall outside Council's direct control.
5. **Economic Development & Tourism Partnerships** - Armidale Regional Council provides a unifying voice for communities and for local businesses when lobbying State and Federal Governments on key economic or infrastructure issues. By undertaking the necessary investigations and preparing informed business cases, Armidale Regional Council provides a conduit for State and Federal Government funding for bigger infrastructure projects like sporting and community facilities, arts and cultural facilities and health, education and transport infrastructure.

Figure 6 - Armidale Regional Council's 'Core' Economic Development Activities



Source: SC Lennon & Associates

Using these 'core' economic development functions as a basis for action, *Unleashing Our Opportunities* provides a framework for Armidale Regional Council – as the lead and in partnership with others – to prioritise its allocation of resources to help secure a sustainable and prosperous future for the Armidale Region.

1.7 Collaboration for Regional Growth and Prosperity

Unleashing Our Opportunities provides the framework for Armidale Regional Council to affect change and promote economic development through the implementation of workable, practical actions. It articulates and promotes a partnership approach between Armidale Regional 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) Northern Inland NSW 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 University of New England (UNE), TAFE New England, the region's Registered Training Organisations (RTOs) and local business chambers and associations.

By informing a strategic and targeted approach to economic development, *Unleashing Our Opportunities* provides 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 region to attract new investment to grow the economy and create jobs.

Unleashing Our Opportunities is informed by consultation and engagement with a diversity of stakeholders. It is based on a solid understanding of the Armidale Region's socio-economic trends and characteristics, and the influences and impacts of broader social, cultural and economic trends taking place nationally and globally.

2. Economic Development Strategy Action Plan

2.1 Economic Development Strategy Themes

Unleashing Our Opportunities contains four strategy themes or 'action areas'. They are:

1. A Region of Choice for 'Smart' and Sustainable Agri-business;
2. A Globally-connected 'Knowledge Region';
3. A Skilled Workforce and Dynamic Regional Business Sector; and
4. A Premium Regional Visitor Destination for Tourism and Events.

Figure 7 - *Unleashing Our Opportunities*: Economic Development Strategy Themes

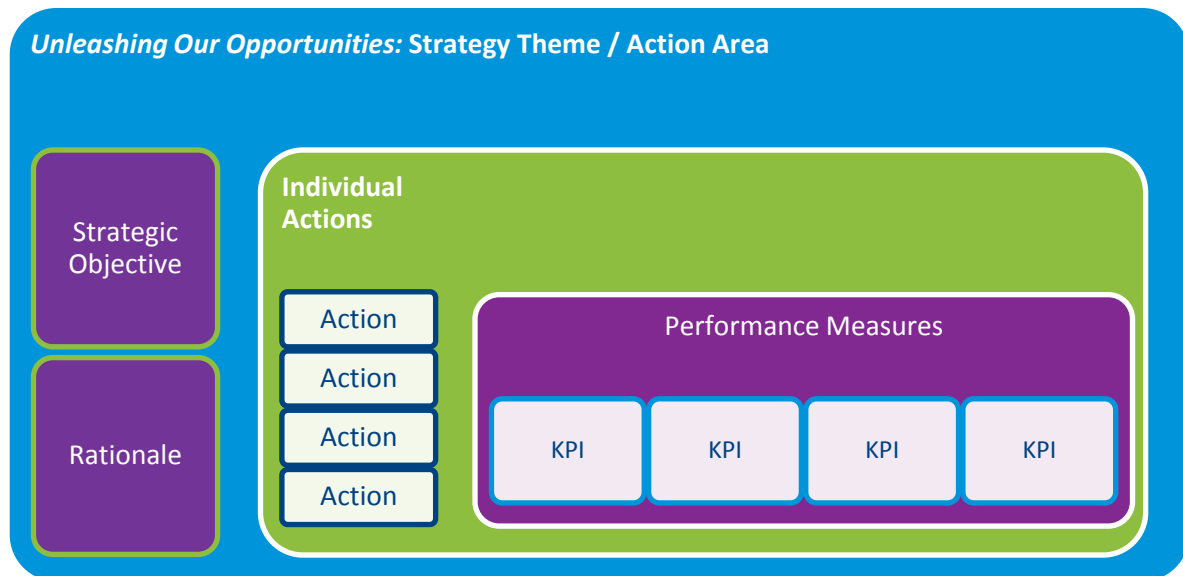


Unleashing Our Opportunities presents a suite of 51 individual actions categorised under the four strategic themes accordingly. Each action area or theme includes:

- **A Strategic Objective** – this is a statement for each theme setting out what the target outcome is for that action area.
- **A Rationale** – this is a statement providing the reasons and a logical basis for the course of action proposed.
- **Actions** – these are the tasks to be carried out to realise the stated objective.

- **Performance Measures** – these are key performance indicators (KPIs) particular to each action area that will be applied to monitor implementation progress over time.

Figure 8 - Economic Development Strategy Action Planning Framework



Source: SC Lennon & Associates

Actions are categorised according to whether they represent:

- **'Catalyst project planning & development'** which requires priority action combined with a well-planned course of project implementation for the desired outcomes to be realised; and
- **'Strategic program implementation'** that can be addressed as part of Armidale Regional Council's day-to-day economic development planning and facilitation functions in a strategic and informed manner.

The majority of actions will be 'Council-led', in that they involve specific tasks for Armidale Regional Council and an allocation of human, physical and financial resources.

Some 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.

Each strategy theme is addressed in turn as follows.

2.2 Economic Development Action Plan

Theme 1: A Region of Choice for 'Smart' and Sustainable Agri-business



Strategic Objective

Capitalise on the Armidale Region's competitive strengths in technology-driven agri-business in livestock and horticulture by establishing an agri-tech 'cluster' focusing on the benefits that flow from networked businesses, institutions and agencies sharing information, ideas, infrastructure and services.

Rationale

Driving diversification into new areas of economic activity, Armidale's agricultural heritage remains and will continue to be a pillar of the region's economic prosperity. In Guyra, sheep, lamb, fine wool, cattle and vegetable production are mainstays of the local economy. Armidale is home to the University of New England (UNE), its Centre for Agribusiness and its SMART Farm, a world-class R&D facility that showcases the latest technologies to improve productivity, environmental sustainability, safety, workflow and business support networks on Australian farms.

Synergies between UNE's rural technology R&D capabilities, local business capabilities in areas like remote sensor technologies, avionics, information technology, veterinary health, rural science and other technical services, and locally-based government departments such as the Australian Pesticides and Veterinary Medicines Authority (APVMA), provides the impetus for an 'agri-tech' cluster to establish in Armidale.

A cluster is a network of interdependent but competitive organisations that share research, information and ideas, trade goods and services, share lifestyle facilities and have access to a common pool of skilled 'knowledge workers'. The Armidale Region's rural R&D profile is supported by its strengths in education and training and what the State Government's "Jobs for NSW" report refers to as the 'six levers of cluster performance'.

The six levers of cluster performance are: (1) brand recognition (Armidale is already recognised as an agri-tech centre of activity and excellence); (2) people networks (Armidale has received an

international accolade from the Intelligent Community Forum being named in the Top 21 Smart Communities for 2016); (3) specialist skills (which will be more readily attracted and developed by a cluster rather than by standalone businesses); (4) infrastructure (being Australia's first 'fully-fibred' city on the mainland under the NBN); (5) innovation acceleration; and (6) cluster leadership.

To 'innovate' means to introduce a new process or way of doing things. The concept of innovation is embedded in Armidale Regional Council's approach to economic development, which is underpinned by a commitment to capitalise on the region's comparative and competitive advantages in agriculture and agri-business. The focus is on initiatives that help transition the region's economy away from 'old economy' agriculture towards one akin to a 'knowledge economy' driven by the region's agri-tech capabilities.

Innovation is the key to economic prosperity and it can be accelerated through well-led cluster networks. By facilitating engagement between tertiary institutions, businesses, industry bodies and government support, clusters provide the pathways to commercialising ideas, developing businesses and creating (smart) jobs.

The UNE Centre for Agribusiness and the UNE Smart Region Incubator underpin local strengths in agribusiness, rural science, agricultural economics, soil science and livestock production. Shared accelerators, incubators or maker spaces can give start-ups access to the technical, office and social facilities they need to grow.



A cluster will enhance the capacity of the Armidale Region to leverage the skills, experience and know-how of its established agri-business base, including more mature firms and industry associations. For example, the Armidale Region is home to 22 cattle breed societies and there is a diversity of specialist agri-business companies successfully operating in the Armidale Region, selling their specialist services to clients throughout Australia and around the world.

The horticultural sector is a rapidly-growing industry and is Australia's third-largest agricultural sector after livestock and broad acre farming. The industry is evolving with a growing trend towards the construction of large-scale, technologically complex, high-yielding and resource-efficient greenhouses using renewable energy such as wind and solar generation. Australia's controlled environment horticulture sector is expected to experience strong revenue growth over the five years to 2022, driven by innovative under-cover growing techniques and greater market awareness of sustainable fruit and vegetable production practices. This presents new opportunities for renewable energy production in the Armidale Region with significant scope to expand glasshouse-based horticulture that can diversify growing systems allowing for a greater diversity of crops and markets served, both here in Australia and overseas.

With new investments and greater capacity for production, an expanded horticultural sector will bring with it opportunities to export food to Asia and beyond. The development of Armidale Regional Airport coupled with growing demand from markets in Asia and Europe for fresh and packaged produce provide export market development opportunities, supporting scope for greater diversification of horticultural production, particularly in high-value crops and packaged produce.



The Armidale Region has already received substantial private sector investment in the horticultural sector. For example, the Costa Group has expanded its tomato-growing greenhouses in Guyra to 30 hectares to become the largest greenhouse operator in Australia. The Costa Group works closely with UNE and others to adopt the latest controlled environment horticulture (CEH) technologies. The climatic conditions of the Armidale Region are ideal for glasshouse-based horticulture and there is scope for expansion and for other crops such as berries.

To grow and prosper, the horticultural sector requires improved water security as droughts experienced in the region over the past ten years have at times, created significant pressure on water allocations. The planned construction of the Guyra to Malpas Dam Pipeline will secure the industry's future and support the growth of the region's other agricultural enterprises.

The Armidale Guyra Business Alliance and Armidale Regional Council are tech-supportive and focussed on opportunities to leverage the region's comparative and competitive strengths. The Armidale Region has an established core of agri-technology businesses, some of whom have been attracted to the region by the NBN.

The Armidale Region has made excellent progress on innovation acceleration as exemplified by the UNE Smart Farm, technology precinct and the 'UNE SMART Region Incubator'. When fully established, this will create an environment where research, knowledge and data can be connected with entrepreneurial ideas to grow high-value and innovative agri-businesses.

Armidale Regional Council assists and supports development of the region's smart and sustainable agri-business in collaboration with the region's other stakeholders. Working with business and industry, UNE, other training institutions and government to progress the development of an agri-tech cluster will underpin the Armidale Region's continuing transition to become Australia's premier high-tech 'knowledge-based' agri-business region.

Actions

Catalyst Project Planning & Development

- 1.1 Collaborate with UNE, the NSW Department of Industry and the Office of Regional Development to formally establish an agri-tech cluster linked to the Armidale Region's industry and research strengths and capabilities in agriculture, controlled environment horticulture, agribusiness, veterinary health and related capabilities.
- 1.2 Collaborate with UNE, the NSW Department of Industry and the Office of Regional Development to establish a business case and prospectus to attract private sector investment to expand controlled environment horticulture in the Armidale Region.
- 1.3 Collaborate with UNE, the NSW Department of Industry and the Office of Regional Development to quantify the costs and benefits of developing renewable energy projects in the Armidale Region to provide cost-effective power generation for an expanding controlled environment horticulture sector.
- 1.4 Prepare a business case for the Guyra to Malpas Dam Pipeline and secure funding for project implementation.

Strategic Program Implementation

- 1.5 Identify and appoint a cluster champion to lead and advance development of the Armidale Region agri-tech cluster.
- 1.6 Prepare an agri-tech cluster strategy and three-year 'roadmap' to guide the cluster's establishment and development. The strategy should focus on fostering business innovation and start-ups, commercialisation of R&D, market research and development, business retention and expansion, business attraction and workforce planning and development.
- 1.7 Partner with TAFE Digital NSW, UNE, local industry stakeholders and Armidale's new full curriculum high school to design an integrated training pathway for the region's school-leavers looking to establish a career in technology-driven agribusiness.
- 1.8 Work with UNE, the NSW Department of Industry and the Office of Regional Development to prepare an Armidale Region agri-tech cluster promotional strategy to support the region's investment attraction efforts (see also Action Area 2).

Performance Measures

- Preparation of an Armidale agri-tech cluster roadmap and the successful development and growth of an agri-tech cluster as a key component of the Armidale Region's developing knowledge economy.
- Further investment in and expansion of the controlled environment horticulture (CEH) sector and the establishment of the Armidale Region as Australia's premier region for controlled environment horticulture.

Theme 2: A Globally-connected 'Knowledge Region'



Strategic Objective

Establish the Armidale Region as a location of choice for 'knowledge workers', entrepreneurs and major innovative businesses seeking a sophisticated, family-friendly city-region lifestyle.

Rationale

'Knowledge workers' - people who are paid to solve problems and generate wealth through the creation of new ideas - are the new drivers of regional economic prosperity. Attracting and retaining knowledge workers and knowledge-intensive businesses is key to the Armidale Region's capacity to prosper in the new economy.

Armidale and Guyra have many attributes which appeal to 'knowledge workers' - quality health care and education (including Armidale's new full curriculum high school), affordable housing, a high level of urban (and rural) amenity, quality recreational, leisure and sporting facilities, community and cultural infrastructure (including the new high school's 1,000-seat multi-purpose performing arts auditorium) and the latest digital connectivity.

Armidale is Australia's first 'fully-fibred' city on the mainland under the NBN and in 2016, received an international accolade from the Intelligent Community Forum for being named in the Top 21 'Smart Communities' in the world. Armidale is also home to the new headquarters for TAFE NSW Digital. This will deliver state-of-the-art online learning experiences for TAFE NSW students across New South Wales and will provide up to 62 jobs at the centre. The Armidale Region's attributes have also been recognised in the identification of Armidale as an ideal relocation destination for the APVMA, which will generate in excess of 172 direct full-time positions in Armidale once established.

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 Australia's regions as young adults, but are choosing to return home later in life, and a number are professionals with a mix of specialist skills.

The value of lifestyle, affordable housing, proximity to friends and family and access to schools, childcare and health services make regional areas like Armidale an attractive alternative to capital cities. It is those attributes which support Armidale's potential to enhance its appeal as a 'knowledge region' and which underpin Armidale Regional Council's approach to investment attraction.

Armidale is the principal service centre of the wider region, as highlighted in the *Draft New England North West Regional Plan* which designates Armidale as a 'regional city'. Major health and education facilities, scientific, technical and professional services and the administrative functions of Commonwealth and NSW Government departments and agencies are located in Armidale.



And new industries are moving to the Armidale Region, as most recently evident with the establishment of the Costa Group's tomato-growing facilities in Guyra. As the region's horticultural sector and other agriculturally-focussed businesses such as high-tech agri-businesses continue to invest in the Armidale Region, this presents positive spin-offs for other industries like retail, personal services and importantly, the professional services which directly serve these economic drivers.

Continued investment in regional infrastructure will support the Armidale Region's capacity to enhance its role as a regional service centre and globally-connected knowledge region. Key investments either planned or underway comprise:

- **Physical infrastructure** improvements including upgrades to Armidale Regional Airport, employment land development at the Airport Industrial Precinct and the upgrade / replacement of timber bridges throughout the region;
- **Cultural and community infrastructure** improvements including the Armidale Central Mall revitalisation (the Mall Vibrancy Plan), the New England Regional Art Gallery upgrade, the new 1,000-seat multi-purpose auditorium at Armidale's new high school and the Old Courthouse Arts and Creative Industries Hub proposal; and
- **Recreational infrastructure** including the Dumaresq Dam recreation development and the UNE Bellevue Stadium upgrade (which would also contribute to the Armidale Region's tourism offer).

Work on strategic infrastructure such as Armidale Regional Airport is on-going. The proposed new and upgraded runway, apron expansion and new taxiways, security screening and a precision [navigation] approach for all weather operation are priorities to enable the airport to service new and expanding industry and a growing population. Current and anticipated needs including car parking to accommodate airport traffic growth and the development of employment land around Armidale Regional Airport are planning priorities.

There is potential to build on the Armidale Region's traditional economic strengths in agriculture and agri-business and the growing food processing sector in Guyra, for example, by consolidating Armidale as an employment location for scientific and technical services to agriculture, and as a location of choice for 'agribusiness' and agri-tech education, research and innovation.

Actions

Catalyst Project Planning & Development

- 2.1 Facilitate partnerships between Armidale Regional Council and other key stakeholders to progress implementation of the Armidale Regional Airport Masterplan with a focus on development of the new and upgraded runway as a priority.
- 2.2 Engage with the major airlines to secure more flights to Armidale.
- 2.3 Prepare a business case for the Armidale Regional Airport Employment Precinct to accommodate light industry and secure funding for its development.
- 2.4 Implement the Armidale Central Mall Vibrancy Plan.
- 2.5 Prepare a cost-effectiveness analysis and business case for the New England Art Gallery upgrade.
- 2.6 Prepare a feasibility study and business case for the Old Courthouse Arts and Creative Industries hub proposal.
- 2.7 Secure funding for the upgrade and replacement of timber bridges throughout the Armidale Region to provide improved roads for the community, businesses and visitors to the region.
- 2.8 Partner with NSW Government and Federal Government agencies to ensure high-quality mobile phone and internet coverage is provided in all communities of the Armidale Region.
- 2.9 Prepare a business case to secure funding for the upgrade of the UNE Bellevue Stadium to cater for a crowd capacity of 5,000 to 10,000 and accommodating 'A-grade' Rugby Union, Rugby League and other State and national sporting events.
- 2.10 Facilitate development of student accommodation and affordable accommodation in the Armidale CBD.
- 2.11 Investigate the establishment of introducing free (ratepayer-funded) public Wi-Fi in the Guyra town centre.
- 2.12 Investigate opportunities to redevelop the Former Armidale Teachers College.

Strategic Program Implementation

- 2.13 Collaborate with the NSW Department of Industry and the Office of Regional Development to prepare an investor prospectus targeting selected 'knowledge-intensive' industries and occupations to help grow the Armidale Region's status as a 'knowledge region'.
- 2.14 Work with the NSW Department of Industry, the Office of Regional Development and RDA Northern Inland NSW to articulate and promote the Armidale Region's competitive advantages including its world-class communications infrastructure (the NBN), Armidale Regional Airport and its strategic location between Brisbane and Sydney. This information should feed directly into an investment attraction strategy and prospectus.
- 2.15 Collaborate with UNE, the NSW Department of Industry and the Office of Regional Development to design and implement an investment attraction strategy tailored to tertiary education industry professionals, researchers, scientists and academics. The prospectus would be designed to support the consolidation and growth of the Armidale Region as a location of choice for smart and sustainable agri-business.
- 2.16 Promote the Armidale Region as an ideal location for call centres/ data centres and back-office functions for large professional services companies and consumer services firms.
- 2.17 Develop an Armidale Region Arts and Culture Program with an emphasis on creating vibrant and attractive public spaces, including the installation of public art in the Armidale CBD and Guyra town centre.
- 2.18 Support UNE to investigate the establishment of a new course offering in creative industries, including entrepreneurship.

Performance Measures

- Establishment of Armidale Regional Airport as Australia's premier regional airport connected to the rest of Australia and the world.
- Establishment of the Armidale Regional Airport Employment Precinct with a diversity of new and existing industries serving local, national and international markets.
- Development of the Armidale Mall as the 'heart' of a vibrant and connected regional city centre underpinning the region's lifestyle appeal and its role as the hub of one of Australia's premium regional visitor destinations.
- The establishment of the Armidale Region as a location of choice for innovative and globally-connected 'knowledge-based' businesses enjoying a vibrant city-region lifestyle.

Theme 3: A Skilled Workforce and Dynamic Regional Business Sector



Strategic Objective

Collaborate with industry, the education and training sector and other tiers of government to enhance the Armidale Region's skills base and to support the growth of the region's innovative, productive and prosperous micro, small-to-medium and large businesses.

Rationale

Economic development requires the mutual relationship between capital (investment) and labour to be nurtured and developed over time. New investment is a driver of economic development and jobs growth and is a focus of *Unleashing Our Opportunities*.

Local enterprise also presents a wealth of opportunity for new investment, and Armidale Regional Council recognises that a successful investment promotion strategy will be one that encourages additional investment from business and industry already located in the Armidale Region.

Armidale Regional Council promotes a 'can-do' attitude to support development of local business infrastructure for retail, industrial and community facilities. Armidale Regional Council has a key role to play to facilitate and support the process of investment and business establishment and growth, particularly in the small business sector including retail and business services.

As the Armidale Region's economy continues to develop over time, Council will employ a range of initiatives to ensure ongoing business establishment, growth and investment in the region is sustained.

Armidale Regional Council is well-positioned to facilitate new business investment with readily-available information on the status of the local economy, industry trends and prospects and locations for investment, including the availability of commercial and industrial land to assist with the crucial decision of site selection. Council can also help to facilitate the development of business start-ups and small to medium-sized businesses by identifying and keeping abreast of business

assistance programs on offer from NSW and Federal Government agencies. This can be effectively facilitated through the appointment of a dedicated grants officer.

If the Armidale Region's businesses are to prosper, they require access to workers with appropriate skills. Access to skilled labour is influenced by the availability of education and training, levels of workforce participation and the mobility and flexibility of labour. While the Armidale Region has a highly-educated workforce, it also has pockets of disadvantage with high youth unemployment and disengagement from the workforce.



According to ABS statistics compiled by the Brotherhood of St Laurence (Australia's Youth Unemployment Hotspots, March 2016), the national youth unemployment rate of 15 to 24-year-olds was at 12.2 per cent in January 2016. Of 20 regions across Australia with youth unemployment rates above 16% 'New England and North West NSW' was ranked eighth with a youth unemployment rate of at 18.1%. Australia's Indigenous youth represents a particularly vulnerable demographic and according to the 2016 Census of Population and Housing, the Armidale Region's Indigenous population accounts for 7.4% of all people living in the region compared to the NSW average of 2.9%.

Workforce planning is essential for facilitating improvements in the region's human capital, which can enhance the innovative and productive capacity of the local workforce, making the Armidale Region more attractive to prospective investors. The Armidale Youth Services Review (2016) identified a range of solutions to engage the region's youth and this included developing more universal areas for professional and organisational development and strategies to 'close the gap' for Indigenous youth.

While much good work is underway, the statistics on youth unemployment and disengagement indicate that more can be done. It is timely to bring all of the stakeholders in this important area together to take stock of the situation and to identify opportunities for gearing up on the initiatives that are in place. This will include opportunities for establishing business enterprises and might also

include research into 'best practice' in this area in the form of case studies that can pave the way for new initiatives.

Initiatives that support the development of a skilled and adaptable workforce are therefore, critical to the future success of the Armidale Region's existing and emerging industry sectors. Those industries which are emerging and / or demonstrate potential for growth include, amongst others, health and wellbeing (such as residential care services and aged care services), retail trade (to serve a growing population), professional services and the arts and creative industries.

Actions

Strategic Program Implementation

- 3.1 Support the development of programs to increase home-based and micro-business capacity-building and innovation in the Armidale Region. Provide information and referrals to existing business development and/or mentoring programs or networks available through the NSW Department of Industry.
- 3.2 In partnership with the region's program delivery agencies, keep abreast of and promote services available to small business to assist them to establish, develop and grow.
- 3.3 Support the UNE business incubator program and the proposed agri-tech cluster (see Action Area 1) to encourage innovation for start-up businesses which is accessible for all entrepreneurs in the Armidale Region.
- 3.4 Provide local businesses with information and access to technology as part of an Armidale Region Digital Economy Strategy, as well as advocating for improved high-speed internet access throughout the region.
- 3.5 In partnership with RDA Northern Inland NSW, the NSW Department of Industry and the Office of Regional Development, support and promote activities that advance the transition of businesses to optimise use of technology and take advantage of the Armidale Region's digital advantages in terms of NBN connectivity.
- 3.6 Investigate incentives to encourage investment in aged care / retirement accommodation in the Armidale Region and include in a targeted investment prospectus.
- 3.7 Undertake an audit and prepare a strategy to nurture and grow the arts and creative industries in the Armidale Region.
- 3.8 Establish and maintain a published register of commercial / industrial land for the information of prospective investors including details of all commercial / industrial land in Armidale and Guyra, its location, zoning, dimensions, current status (i.e. use – retail, office, vacant) and relevant qualitative features.
- 3.9 Ensure Armidale Regional Council's land use planning framework aligns strategic land with opportunities for the attraction and development of new industries in the Armidale Region.
- 3.10 In partnership with UNE, TAFE New England and Registered Training Organisations, identify and encourage careers for young people in the Armidale Region's key industry sectors.

- 3.11 Collaborate with the Armidale Region's service providers to review and assess ongoing initiatives to address youth and Indigenous youth unemployment and disengagement. In light of the review, prepare a regional strategy to renew and extend key initiatives using information acquired from the latest 'best practice' case studies.
- 3.12 Undertake a regular (annual) '*Armidale Region Business Needs and Issues Survey*' and prepare a report for Council and relevant stakeholders, that summarises concerns and needs identified by local business; report back to business on Council's response and undertake supplementary investigations on verified priority issues.

Performance Measures

- An increase in the number of successful home-based and micro-businesses in the Armidale Region.
- An increase in businesses accessing support available through the UNE business incubator program and the proposed agri-tech cluster.
- The successful delivery of effective services to assist the Armidale Region's unemployed and disengaged youth and Indigenous youth in accessing gainful employment.
- An increase in digital take-up and engagement by businesses in the Armidale Region.
- New business investment and employment in key industries of opportunity including aged care and the creative industries.



Theme 4: A Premium Regional Visitor Destination for Tourism and Events



Strategic Objective

Deliver a collaborative and co-ordinated approach to tourism promotion and development to establish the Armidale Region as a premium regional destination for tourism and events.

Rationale

Visitors are attracted to the Armidale Region for a variety of reasons including sporting events, UNE events, visiting friends and relatives and availing themselves of the region's recreational and cultural activities. The Armidale Region is part of the New England North West tourism region. According to Destination NSW, in the year to March 2017, visiting friends and relatives (VFR) was the largest purpose in terms of nights in the region at 37.5% of visitors, followed by 'holiday' (32.1%) and 'business' (18.8%). Compared to the year ended March 2016, nights spent for 'VFR' grew by 14.1% and 'holiday' increased by 1.6% while 'business' grew by 14.4%. In terms of market share, the New England North West region received 7.4% of visitors and 6% of nights in regional NSW.

Visitors generate valuable export dollars for the Armidale Region that create jobs across a diversity of industries. Visitor activity impacts on food and entertainment, retail, arts and culture, creative industries, transport and logistics, sporting and recreation facilities and events, and the Armidale Region's accommodation sector.

To maximise the Armidale Region's 'tourism offer' and the benefits a stronger visitor economy will deliver to the region in a competitive environment, Armidale Regional Council will foster partnerships between all industry stakeholders. Council has been engaged in a number of activities designed to enhance the depth and diversity of existing and new visitor attractions and experiences and to improve the provision of tourism infrastructure to support economic growth.

Opportunities that continue to evolve and which require the attention of Council and its partners in tourism promotion and development include: sport and recreation by developing facilities and

building on the sports events already on offer in the Armidale Region; conferences - expanding partnerships between the private sector and UNE to build upon existing conference tourism activities in the Armidale Region; eco-tourism - providing greater access to National Parks and creating additional attractions, including unique eco-accommodation facilities; attracting passers-by to generate more drive-tourism including families, 'grey nomads' and recreational motorcycle tours; wine tourism - through marketing and coordination of the local wine industry, further developing the potential to produce high quality cold-climate wines; and cultural tourism - developing festivals and events in the Armidale Region.

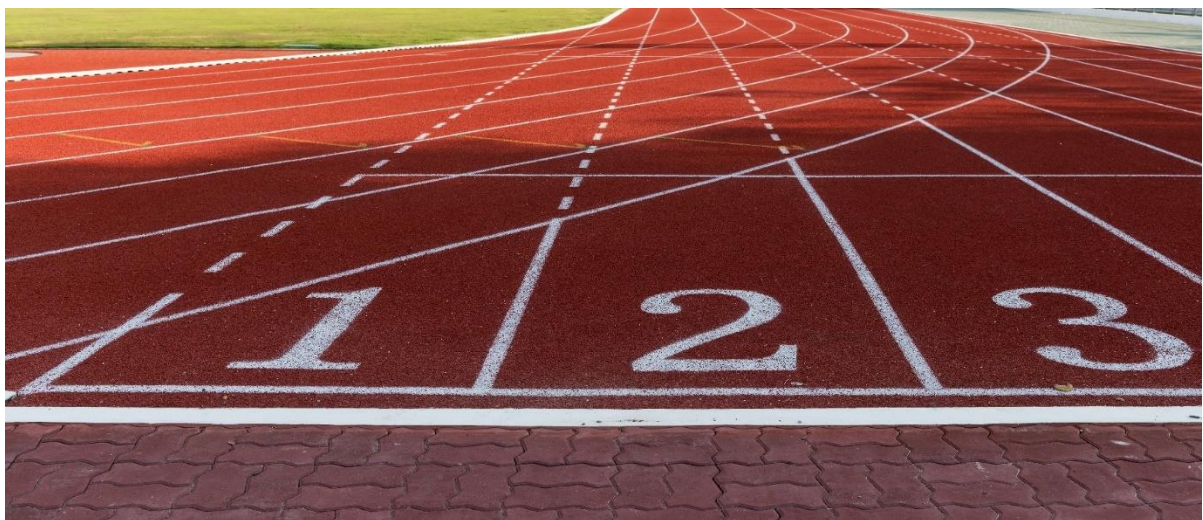
Armidale Regional Council embraces a partnership approach to tourism promotion and development, and in collaboration with tourism industry operators and neighbouring Councils, has pro-actively developed the 'New England High Country' brand.

With a number of regionally-significant project opportunities identified, which will capitalise on the themes highlighted above and leverage new investments such as the Armidale Regional Airport expansion and planned new runway, it is timely to prioritise and plan for new programs and projects that will elevate the Armidale Region's tourism industry to the next level. Key program initiatives include, for example:

- Developing a regional sports tourism strategy;
- Exploring new festivals and events (e.g. a vintage car rally);
- Promoting development of the 'Waterfall Way' link east to the coast;
- Further developing a regional events calendar; and
- Promoting the Armidale Region to international students and their families.

Specific projects that require further consideration and investigation include:

- The New England Rail Trail Stage One (34 kilometres from Black Mountain to Ben Lomond);
- Recreational / visitor infrastructure including the Dumaresq Dam recreation development, Mother of Ducks Lagoon recreational area development and the UNE Bellevue Stadium upgrade; and
- The Saumarez Homestead development targeting the education and 'grey nomad' markets.



Armidale Regional Council recognises that projects which require significant capital expenditure should be subject to rigorous evaluation and prioritisation prior to funding commitments being made. Hence, the preparation of individual business cases for priority tourism projects identified is central to the tourism action plan as a key component of *Unleashing Our Opportunities*.

Actions

Catalyst Project Planning & Development

- 4.1 Prepare a sports tourism strategy to plan for new sporting facilities and facility upgrades to accommodate the growth and development sports tourism in the Armidale Region.
- 4.2 Undertake a feasibility study and prepare a full business case for the New England Rail Trail Project.
- 4.3 In line with the completed masterplan, prepare a feasibility study and business case for the Dumaresq Recreational Dam Development Project.
- 4.4 Prepare a concept plan / master plan for the revitalisation and development of the Mother of Ducks Lagoon Recreational Area.
- 4.5 Undertake a two-stage market assessment and pre-feasibility study into the potential for Armidale to host a conferences and events venue with a minimum capacity of 500 people, to attract larger events and boost the region's tourism spend.
- 4.6 Undertake a feasibility study and prepare a full business case for the Saumarez Homestead Development Project.
- 4.7 Lobby government to develop the infrastructure necessary to upgrade the Waterfall Way.

Strategic Program Implementation

- 4.8 Undertake an audit of the Armidale Region's visitor attractions to inform the development of marketing collateral for all attractions under the New England High Country brand as the basis of future promotional campaigns.
- 4.9 Investigate ways to work with peak bodies and the tourism industry to access the best available tourism data for the Armidale Region.
- 4.10 Undertake a thorough review of the effectiveness of the web-based events calendar system in co-ordinating major events and resourcing requirements. This will include a 'filtering' capability where events are selected by type and visitor attracting ability.
- 4.11 Prepare an Armidale Region signage strategy to encourage visitors to stop and explore the Armidale Region's towns and many other attractions as they travel to and from other locations and visitor destinations.
- 4.12 Identify and promote night-time economy opportunities in the Armidale CBD to improve amenity and the appeal of Armidale as a destination for locals, residents from the wider region and visitors.

- 4.13 Use the findings of the Armidale Region arts and creative industries (ACI) audit (see Action 3.7) to identify opportunities for the potential role the arts creative industries can play in contributing to the Armidale Region's tourism offer.

Performance Measures

- Secure funding and develop key tourism infrastructure projects to enhance the Armidale Region's tourism offer, in line with the objective to establish the Armidale Region as a premium regional destination for tourism and events.
- Increase the New England North West region's share of visitors to regional NSW from 7.4% to 12% and increase its share of visitor nights from 6% to 10%.



3. Implementation Priorities and Performance Monitoring

3.1 Economic Development Priorities for Action

Unleashing Our Opportunities presents priority projects and activities for implementation as part of a Year 1 economic development work plan. They reflect priorities that Armidale Regional Council will advance (in association with identified partners where relevant) as short-term priorities. The priorities for implementation (in no particular order) are:

- Collaborate with UNE, the NSW Department of Industry and the Office of Regional Development to formally establish an agri-tech cluster linked to the Armidale Region's industry and research strengths and capabilities in agriculture, controlled environment horticulture, agribusiness, veterinary health and related capabilities (Action 1.1).
- Collaborate with UNE, the NSW Department of Industry and the Office of Regional Development to establish a business case and prospectus to attract private sector investment to expand controlled environment horticulture in the Armidale Region (Action 1.2).
- Facilitate partnerships between Armidale Regional Council and other key stakeholders to progress implementation of the Armidale Regional Airport Masterplan with a focus on development of the new and upgraded runway as a priority (Action 2.1).
- Engage with the major airlines to secure more flights to Armidale (Action 2.2).
- Prepare a business case for the Armidale Regional Airport Employment Precinct to accommodate light industry and secure funding for its development (Action 2.3).
- Implement the Armidale Central Mall Vibrancy Plan (Action 2.4).
- Prepare a business case to secure funding for the upgrade of the UNE Bellevue Stadium to cater for a crowd capacity of 5,000 to 10,000 and accommodating 'A-grade' Rugby Union, Rugby League and other State and national sporting events (Action 2.9).
- Work with the NSW Department of Industry, the Office of Regional Development and RDA Northern Inland NSW to articulate and promote the Armidale Region's competitive advantages including its world-class communications infrastructure (the NBN), Armidale Regional Airport and its strategic location between Brisbane and Sydney. This information should feed directly into an investment attraction strategy and prospectus (Action 2.14).
- Support the UNE business incubator program and the proposed agri-tech cluster (see Action Area 1) to encourage innovation for start-up businesses which is accessible for all entrepreneurs in the Armidale Region (Action 3.3).
- Collaborate with the Armidale Region's service providers to review and assess ongoing initiatives to address youth and Indigenous youth unemployment and disengagement. In light of the review, prepare a regional strategy to renew and extend key initiatives using information acquired from the latest 'best practice' case studies (Action 3.12).

- Prepare a sports tourism strategy to plan for new sporting facilities and facility upgrades to accommodate the growth and development sports tourism in the Armidale Region (Action 4.1).
- Undertake a feasibility study and prepare a full business case for the New England Rail Trail Project (Action 4.2).
- In line with the completed masterplan, prepare a feasibility study and business case for the Dumaresq Recreational Dam Development Project (Action 4.3).
- Prepare a concept plan / master plan for the revitalisation and development of the Mother of Ducks Lagoon Recreational Area (Action 4.4).

In progressing these priorities, monitoring progress will be key.

3.2 Economic Development Strategy Outcomes and Performance Measures

Unleashing Our Opportunities: Armidale Region Economic Development Strategy, 2017-2025 will be implemented by Armidale Regional Council in partnership with the NSW Government, the Australian Government, business and industry bodies including the Armidale Guyra Business Alliance and other supporting partners across the region.

Internal and external reference groups and working committees will be established to ensure ownership of the Economic Development Strategy and a commitment to its implementation. To this end, Armidale Regional Council will take the lead, to establish and maintain formal working relationships with key economic development players at a regional and local level.

The Armidale Region's businesses and residents will continue to be engaged to ensure effective collaboration and commitment to the delivery of Council's economic development agenda.



To monitor strategy progress, set performance measures have been established using a range of indicators, including both 'outcome' measures and 'output' measures.

Outcome measures refer to broad development outcomes at the regional level, such as industry output (gross revenue generated by the Armidale Region's businesses), business establishments growth and jobs.

Output measures on the other hand, include, for example, levels of business confidence, community satisfaction, numbers of investment enquiries, action milestones and project progress and completion.

In addition to key performance measures shown for each of the four action areas in this strategy, *Unleashing Our Opportunities* supports the achievement of the region's desired economic outcomes being:

- A \$1.5 billion Armidale Region economy by 2025 (which represents a 10 per cent increase in the size of the region's economy over eight years).
- An increase in the Armidale Region's population from 30,000 to at least 35,500 by 2025.
- 14,500 local jobs by 2025 (up by approximately 10 per cent from 13,200 in 2016).
- Inter-regional exports that account for 65 per cent of the Armidale Region's GRP (currently around 55%).

Targets 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 economy.id and profile.id;
- Australian Bureau of Statistics (ABS) Business Register data; and
- Department of Employment Labour Markets data on unemployment and labour force trends.

Economic development strategy performance measures will be reported every year in line with the implementation priorities of the Economic Development Strategy.

Progress on the implementation of *Unleashing Our Opportunities* will be assessed annually with a full review and update of the Strategy anticipated in four years.

Appendix – Economic Development Action Plan in Summary

Theme 1: A Region of Choice for ‘Smart’ and Sustainable Agri-business

Catalyst Project Planning & Development

- 1.1 Collaborate with UNE, the NSW Department of Industry and the Office of Regional Development to formally establish an agri-tech cluster linked to the Armidale Region’s industry and research strengths and capabilities in agriculture, controlled environment horticulture, agribusiness, veterinary health and related capabilities.
- 1.2 Collaborate with UNE, the NSW Department of Industry and the Office of Regional Development to establish a business case and prospectus to attract private sector investment to expand controlled environment horticulture in the Armidale Region.
- 1.3 Collaborate with UNE, the NSW Department of Industry and the Office of Regional Development to quantify the costs and benefits of developing renewable energy projects in the Armidale Region to provide cost-effective power generation for an expanding controlled environment horticulture sector.
- 1.4 Prepare a business case for the Guyra to Malpas Dam Pipeline and secure funding for project implementation.

Strategic Program Implementation

- 1.5 Identify and appoint a cluster champion to lead and advance development of the Armidale Region agri-tech cluster.
- 1.6 Prepare an agri-tech cluster strategy and three-year ‘roadmap’ to guide the cluster’s establishment and development. The strategy should focus on fostering business innovation and start-ups, commercialisation of R&D, market research and development, business retention and expansion, business attraction and workforce planning and development.
- 1.7 Partner with TAFE Digital NSW, UNE, local industry stakeholders and Armidale’s new full curriculum high school to design an integrated training pathway for the region’s school-leavers looking to establish a career in technology-driven agribusiness.
- 1.8 Work with UNE, the NSW Department of Industry and the Office of Regional Development to prepare an Armidale Region agri-tech cluster promotional strategy to support the region’s investment attraction efforts (see also Action Area 2).

Theme 2: A Globally-connected 'Knowledge Region'

Catalyst Project Planning & Development

- 2.1 Facilitate partnerships between Armidale Regional Council and other key stakeholders to progress implementation of the Armidale Regional Airport Masterplan with a focus on development of the new and upgraded runway as a priority.
- 2.2 Engage with the major airlines to secure more flights to Armidale.
- 2.3 Prepare a business case for the Armidale Regional Airport Employment Precinct to accommodate light industry and secure funding for its development.
- 2.4 Implement the Armidale Central Mall Vibrancy Plan.
- 2.5 Prepare a cost-effectiveness analysis and business case for the New England Art Gallery upgrade.
- 2.6 Prepare a feasibility study and business case for the Old Courthouse Arts and Creative Industries hub proposal.
- 2.7 Secure funding for the upgrade and replacement of timber bridges throughout the Armidale Region to provide improved roads for the community, businesses and visitors to the region.
- 2.8 Partner with State and Federal Government agencies to ensure high-quality mobile phone and internet coverage is provided in all communities of the Armidale Region.
- 2.9 Prepare a business case to secure funding for the upgrade of the UNE Bellevue Stadium to cater for a crowd capacity of 5,000 to 10,000 and accommodating 'A-grade' Rugby Union, Rugby League and other State and national sporting events.
- 2.10 Facilitate development of student accommodation and affordable accommodation in the Armidale CBD.
- 2.11 Investigate the establishment of introducing free (ratepayer-funded) public Wi-Fi in the Guyra town centre.
- 2.12 Investigate opportunities to redevelop the Former Armidale Teachers College.

Strategic Program Implementation

- 2.13 Collaborate with the NSW Department of Industry and the Office of Regional Development to prepare an investor prospectus targeting selected 'knowledge-intensive' industries and occupations to help grow the Armidale Region's status as a 'knowledge region'.
- 2.14 Work with the NSW Department of Industry, the Office of Regional Development and RDA Northern Inland NSW to articulate and promote the Armidale Region's competitive advantages including its world-class communications infrastructure (the NBN), Armidale Regional Airport and its strategic location between Brisbane and Sydney. This information should feed directly into an investment attraction strategy and prospectus.

- 2.15 Collaborate with UNE, the NSW Department of Industry and the Office of Regional Development to design and implement an investment attraction strategy tailored to tertiary education industry professionals, researchers, scientists and academics. The prospectus would be designed to support the consolidation and growth of the Armidale Region as a location of choice for smart and sustainable agri-business.
- 2.16 Promote the Armidale Region as an ideal location for call centres/ data centres and back-office functions for large professional services companies and consumer services firms.
- 2.17 Develop an Armidale Region Arts and Culture Program with an emphasis on creating vibrant and attractive public spaces, including the installation of public art in the Armidale CBD and Guyra town centre.
- 2.18 Support UNE to investigate the establishment of a new course offering in creative industries, including entrepreneurship.

Theme 3: A Skilled Workforce and Dynamic Regional Business Sector

Strategic Program Implementation

- 3.1 Support the development of programs to increase home-based and micro-business capacity-building and innovation in the Armidale Region. Provide information and referrals to existing business development and/or mentoring programs or networks available through the NSW Department of Industry.
- 3.2 In partnership with the region's program delivery agencies, keep abreast of and promote services available to small business to assist them to establish, develop and grow.
- 3.3 Support the UNE business incubator program and the proposed agri-tech cluster (see Action Area 1) to encourage innovation for start-up businesses which is accessible for all entrepreneurs in the Armidale Region.
- 3.4 Provide local businesses with information and access to technology as part of an Armidale Region Digital Economy Strategy, as well as advocating for improved high-speed internet access throughout the region.
- 3.5 In partnership with RDA Northern Inland NSW, the NSW Department of Industry and the Office of Regional Development, support and promote activities that advance the transition of businesses to optimise use of technology and take advantage of the Armidale Region's digital advantages in terms of NBN connectivity.
- 3.6 Investigate incentives to encourage investment in aged care / retirement accommodation in the Armidale Region and include in a targeted investment prospectus.
- 3.7 Undertake an audit and prepare a strategy to nurture and grow the arts and creative industries in the Armidale Region.
- 3.8 Establish and maintain a published register of commercial / industrial land for the information of prospective investors including details of all commercial / industrial land in Armidale and

Guyra, its location, zoning, dimensions, current status (i.e. use – retail, office, vacant) and relevant qualitative features.

- 3.9 Ensure Armidale Regional Council's land use planning framework aligns strategic land with opportunities for the attraction and development of new industries in the Armidale Region.
- 3.10 In partnership with UNE, TAFE New England and Registered Training Organisations, identify and encourage careers for young people in the Armidale Region's key industry sectors.
- 3.11 Collaborate with the Armidale Region's service providers to review and assess ongoing initiatives to address youth and Indigenous youth unemployment and disengagement. In light of the review, prepare a regional strategy to renew and extend key initiatives using information acquired from the latest 'best practice' case studies.
- 3.12 Undertake a regular (annual) '*Armidale Region Business Needs and Issues Survey*' and prepare a report for Council and relevant stakeholders, that summarises concerns and needs identified by local business; report back to business on Council's response and undertake supplementary investigations on verified priority issues.

Theme 4: A Premium Regional Visitor Destination for Tourism and Events

Catalyst Project Planning & Development

- 4.1 Prepare a sports tourism strategy to plan for new sporting facilities and facility upgrades to accommodate the growth and development sports tourism in the Armidale Region.
- 4.2 Undertake a feasibility study and prepare a full business case for the New England Rail Trail Project.
- 4.3 In line with the completed masterplan, prepare a feasibility study and business case for the Dumaresq Recreational Dam Development Project.
- 4.4 Prepare a concept plan / master plan for the revitalisation and development of the Mother of Ducks Lagoon Recreational Area.
- 4.5 Undertake a two-stage market assessment and pre-feasibility study into the potential for Armidale to host a conferences and events venue with a minimum capacity of 500 people, to attract larger events and boost the region's tourism spend.
- 4.6 Undertake a feasibility study and prepare a full business case for the Saumarez Homestead Development Project.
- 4.7 Lobby government to develop the infrastructure necessary to upgrade the Waterfall Way.

Strategic Program Implementation

- 4.8 Undertake an audit of the Armidale Region's visitor attractions to inform the development of marketing collateral for all attractions under the New England High Country brand as the basis of future promotional campaigns.
- 4.9 Investigate ways to work with peak bodies and the tourism industry to access the best available tourism data for the Armidale Region.
- 4.10 Undertake a thorough review of the effectiveness of the web-based events calendar system in co-ordinating major events and resourcing requirements. This will include a 'filtering' capability where events are selected by type and visitor attracting ability.
- 4.11 Prepare an Armidale Region signage strategy to encourage visitors to stop and explore the Armidale Region's towns and many other attractions as they travel to and from other locations and visitor destinations.
- 4.12 Identify and promote night-time economy opportunities in the Armidale CBD to improve amenity and the appeal of Armidale as a destination for locals, residents from the wider region and visitors.
- 4.13 Use the findings of the Armidale Region arts and creative industries (ACI) audit (see Action 3.7) to identify opportunities for the potential role the arts creative industries can play in contributing to the Armidale Region's tourism offer.



Unleashing Our Opportunities: Armidale Region Economic Development Strategy, 2017-2025



Unleash the opportunities

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