



ATTACHMENTS

Tuesday, 16 October 2018

UNDER SEPARATE COVER

Ordinary Council Meeting

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Richmond
Valley
Council



MINUTES

**Ordinary Council Meeting
18 September 2018**

ORDINARY COUNCIL MEETING MINUTES

18 SEPTEMBER 2018

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ORDINARY COUNCIL MEETING MINUTES

18 SEPTEMBER 2018

**MINUTES OF RICHMOND VALLEY COUNCIL
ORDINARY COUNCIL MEETING
HELD AT THE COUNCIL CHAMBERS, 10 GRAHAM PLACE, CASINO
ON TUESDAY, 18 SEPTEMBER 2018 AT 5.00 PM**

Please note: these minutes are subject to confirmation at the next Council Meeting. Decisions recorded in the draft minutes are subject to the Council's Code of Meeting Practice in relation to rescinding decisions.

PRESENT: Cr Robert Mustow (Mayor), Cr Stephen Morrissey (Deputy Mayor), Cr Sam Cornish, Cr Robert Hayes, Cr Sandra Humphrys, Cr Jill Lyons, Cr Daniel Simpson

IN ATTENDANCE: Vaughan Macdonald (General Manager), Ryan Gaiter (Chief Financial Officer/Manager Mid-Richmond), Angela Jones (Director Infrastructure and Environment), Deborah McLean (Manager Governance & Risk), Julie Clark (Personal Assistant to the General Manager and Mayor).

1 ACKNOWLEDGEMENT OF COUNTRY

The Mayor provided an Acknowledgement of Country by reading the following statement on behalf of Council:

"Richmond Valley Council recognises the people of the Bundjalung Nations as Custodians and Traditional Owners of this land and we value and appreciate the continuing cultural connection to lands, their living culture and their unique role in the life of this region in the past, present and future."

2 PRAYER

The Meeting opened with a prayer by the General Manager

3 PUBLIC ACCESS AND QUESTION TIME

3.2 Public Access – Dr Richard Gates (President & Life Member The Evans Head Living Museum & Community Technology Centre Inc.) addressed Council in relation to Item 6.1 Minutes of the Ordinary Meeting held 21 August 2018.

Dr Gates referred to the keeping of minute records and Council's duty of care to keep full and accurate minutes. Commented the draft Minutes before Council tonight (Item 14.1) were missing the full report which was a critical element and requested that Council amend the minutes before ratifying them as full and accurate.

3.3 Public Access – Dr Richard Gates (President Evans Head Memorial Aerodrome Committee Inc.) addressed Council in relation to Item 17.6 Application to vary a development standard (Local Government Act, Section 82) Gateway Lifestyle Investments Holdings Pty Ltd, 17 Memorial Airport Drive, Evans Head

Dr Gates referred to Item 17.6 and enquired as to why there was a delay in receipt of the application before Council. Commented that no consideration has been provided to the Airpark estate and requested the matter be deferred for consideration until after the Airpark property

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settlement has taken place. Further commented that building the homes onsite will cause additional noise and environmental impacts to the local amenity.

4 APOLOGIES

Nil

RESOLUTION 180918/1

Moved: Cr Stephen Morrissey

Seconded: Cr Daniel Simpson

That Councillor Morrissey be granted leave of absence for the October Ordinary meeting.

CARRIED

5 MAYORAL MINUTES

Nil

6 CONFIRMATION OF MINUTES**6.1 MINUTES OF THE ORDINARY MEETING HELD ON 21 AUGUST 2018****RESOLUTION 180918/2**

Moved: Cr Robert Hayes

Seconded: Cr Sandra Humphrys

1. That the Minutes of the Ordinary Meeting, held on 21 August 2018, be taken as read and confirmed as a true record of proceedings.

CARRIED

7 MATTERS ARISING OUT OF THE MINUTES

Nil

8 DECLARATION OF INTERESTS

Cr Hayes declared an insignificant pecuniary conflict of interest in Item 18.2 Development Applications determined under the Environmental Planning and Assessment Act for the period 1 August 2018 to 31 August 2018 DA2019/21 and DA2019/23 (applicant for developments).

9 PETITIONS

Nil

10 NOTICE OF MOTION

Nil

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11 MAYOR'S REPORT**11.1 MAYORAL MINUTE - MAYOR'S ATTENDANCES 5 AUGUST - 10 SEPTEMBER 2018****RESOLUTION 180918/3**

Moved: Cr Robert Mustow

Seconded: Cr Stephen Morrissey

That the Mayor's Report for the period 5 August – 10 September be received and noted.

CARRIED**12 DELEGATE'S REPORTS****12.1 DELEGATES REPORT SUBMITTED TO THE AUGUST 2018 ORDINARY MEETING****RESOLUTION 180918/4**

Moved: Cr Robert Mustow

Seconded: Cr Stephen Morrissey

That the Delegates' Report for the month of August 2018, be received and noted.

CARRIED**13 MATTERS DETERMINED WITHOUT DEBATE**

Each Councillor is given the opportunity to indicate which items they wish to debate or question. Item numbers identified for debate or questioning will be read to the Meeting.

Items identified for debate include; 14.1, 17.1, 17.2, 17.5 & 17.6

Following identification of the above items a motion will be moved in regard to the balance of items being determined without debate.

13.1 MATTERS DETERMINED WITHOUT DEBATE**RESOLUTION 180918/5**

Moved: Cr Sandra Humphrys

Seconded: Cr Jill Lyons

That items 15.1, 17.3, 17.4 be determined without debate.

CARRIED

14 GENERAL MANAGER'S REPORTS**14.1 ELECTION OF DEPUTY MAYOR****EXECUTIVE SUMMARY**

Section 231 of the *Local Government Act 1993 (The Act)* provides that the Councillors may elect a deputy mayor for the mayoral term or for a shorter term. The deputy mayor may exercise any function of the mayor at the request of the mayor, or if the mayor is prevented by illness, absence or otherwise from exercising the function, or if there is a casual vacancy in the office of mayor.

Schedule 7 of the *Local Government (General) Regulation 2005 (The Regulations)* provides for the method of conduct for the election of Deputy Mayor. The methods of conduct for the election, if more than one Councillor is nominated, are by preferential ballot, by ordinary ballot or by open voting.

It is recommended that the Deputy Mayor be elected for a 12 month term and that the method of conduct for the election of Deputy Mayor be by open voting.

It is also appropriate following declaration of the election result that nomination forms and any ballot papers be destroyed.

RESOLUTION 180918/6

Moved: Cr Sandra Humphrys

Seconded: Cr Sam Cornish

That:

1. Council elect a Deputy Mayor for a one year period.
2. Nominations for the position of Deputy Mayor be submitted in accordance with the Local Government (General) Regulation 2005, Schedule 7.
3. The method of conduct for the election of Deputy Mayor be by open voting.

CARRIED

The General Manager, as Returning Officer for the election, advised that he had received one nomination for the position of Deputy Mayor and called for further nominations from the floor, however none were submitted. He advised that the nomination he had received was a valid nomination and it was from Cr Stephen Morrissey.

As there was one nomination only, Cr Stephen Morrissey was declared elected as Deputy Mayor for the next 12 months.

The Mayor congratulated Cr Morrissey on his election as Deputy Mayor during the next 12 months.

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15 FINANCIAL REPORTS**15.1 FINANCIAL ANALYSIS REPORT - AUGUST 2018****EXECUTIVE SUMMARY**

The purpose of this report is to inform Council on the status and performance of its investment portfolio in accordance with the *Local Government Act 1993* (Section 625), *Local Government (General) Regulation 2005* (Clause 212), Australian Accounting Standard AASB 139 and Council's Investment Policy.

The value of Council's Investment Portfolio as at 31 August 2018 including General Bank Accounts and Trust Funds are shown below.

Investment Portfolio	General Bank Accounts	Trust Funds	Total
\$44,735,091	\$2,693,912	\$120,995	\$47,549,998

The rate of return on Council's investments for August 2018 was 2.74% which is above the 90 Day Bank Bill Index for August of 1.95%.

RESOLUTION 180918/7

Moved: Cr Sandra Humphrys

Seconded: Cr Jill Lyons

Recommended that Council adopt the Financial Analysis Report detailing investment performance for the month of August 2018.

CARRIED**16 TENDER REPORTS**

Nil

17 GENERAL BUSINESS**17.1 RE-ESTABLISHMENT OF ALCOHOL FREE ZONES IN CASINO, CORAKI AND EVANS HEAD****EXECUTIVE SUMMARY**

Richmond Valley Council's existing Alcohol Free Zones have a mandatory four year sunset period. This period will expire on 30 September 2018 and a Council determination is required to continue the Alcohol Free Zones for a further four year period from 1 October 2018 to 1 October 2022.

Relevant authorities and local licensees have been notified and no objections were received by Council.

RESOLUTION 180918/8

Moved: Cr Stephen Morrissey

Seconded: Cr Robert Hayes

That the Alcohol Free Zone in Casino CBD, South Casino, Coraki CBD and Evans Head CBD are

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re-established for a period of four years effective from 1 October 2018.

CARRIED

17.2 DISCONTINUANCE OF PLANNING PROPOSAL FOR RURAL RESIDENTIAL LAND AT DARKE LANE, SWAN BAY - PP2016/0003

EXECUTIVE SUMMARY

Planning Proposal PP2016/0003 sought to rezone a portion of lots 831, 832 and 833 DP 847683 from RU1–Primary Production to R5–Large Lot Residential. The proposal has been unable to satisfactorily address concerns raised by the Department of Primary Industries (DPI) Agriculture that potential future land use conflict will occur within a productive agricultural landscape. The immediate area of the property and surrounds is notably used for sugar cane cropping and the proposal represents a potential loss of important prime agricultural land, as ruled out by the *Richmond River Rural Residential Strategy 1999*. The matter has been referred to and discussed in some detail with DPI and despite the applicant being given ample opportunity to address concerns, the issues remain unresolved. Without the support of DPI Agriculture and Council the planning proposal may not progress.

RESOLUTION 180918/9

Moved: Cr Daniel Simpson

Seconded: Cr Robert Hayes

That Council defer the report Discontinuance of Planning Proposal for Rural Residential Land at Darke Lane, Swan Bay PP2016/0003, until additional information is available for consideration.

CARRIED

17.3 CASINO SHOWGROUND AND RACECOURSE DRAFT MASTER PLAN

EXECUTIVE SUMMARY

Council Staff have been working with the Casino Showgrounds User Group for the past 12 months to establish a draft master plan for future development of the Casino Showground. A final draft document is presented to Council following recent workshops, information forums with key stakeholders and community consultation.

Information within the document has been used to support Regional Development Funding Grant applications for \$8 million for proposed works.

The key feature to the future development of the site is an Indoor Equestrian Arena, redevelopment of the horse racing training stables, renewal of the sand track and race course proper along with associated yarding and stable infrastructure.

The proposed site improvements allows for major regional events which will provide an economic boost to the Richmond Valley, as well as full time jobs within the horse training and racing industry based in Casino.

RESOLUTION 180918/10

Moved: Cr Sandra Humphrys

Seconded: Cr Jill Lyons

That Council adopt the master plan for the Casino Showground and Racecourse.

CARRIED

17.4 CRAWFORD SQUARE DRAFT MASTER PLAN - CONSULTATION STAGE**EXECUTIVE SUMMARY**

Council has engaged landscape architects Integrated Site Design to prepare a master plan for Crawford Square Casino. The draft plan has been created using information provided by Council officer's knowledge and experience of the facility, combined with historical feedback from Council customer requests. It is proposed Crawford Square be developed into a multi-use facility, catering for recreation, both passive and active in a variety of zones across the park. The proposal is to cater for all ages and abilities including the introduction of a water play space being a distinct feature to the region. Information will be compiled throughout the consultation period and a more detailed draft proposal will be submitted to Council for adoption as an approved master plan.

RESOLUTION 180918/11

Moved: Cr Sandra Humphrys

Seconded: Cr Jill Lyons

That:

1. Council adopt the draft master plan for Crawford Square to allow for a period of community consultation for 28 days; and
2. Feedback from the public exhibition period is considered in the preparation of a final draft to be presented to Council in the future.

CARRIED

17.5 CASINO SWIMMING POOL DRAFT MASTER PLAN AND POOL INFORMATION REPORTS**EXECUTIVE SUMMARY**

Council Officers continue to monitor, assess and maintain the aging pool infrastructure within Richmond Valley. As part of this process, works have been undertaken to produce a draft master plan for the Casino Memorial Swimming Pool. It is proposed this concept plan be used as a basis for community consultation, encouraging the public to submit their ideas for the future use of the facility.

This report also provides general information regarding the operational issues at Coraki and Woodburn Pools, and highlights the steps intended for the short term operation of these facilities.

RESOLUTION 180918/12

Moved: Cr Daniel Simpson

Seconded: Cr Stephen Morrissey

That:

1. Council remain informed and aware of the current condition of public swimming pool infrastructure within Richmond Valley to allow for future financial and strategic planning.
2. Council approve the Draft Casino Swimming Pool Master Plan to be placed on public exhibition for a period of 40 days.
3. Feedback from the public exhibition period is considered in the preparation of a final draft to be presented to Council in the future.

CARRIED**17.6 APPLICATION TO VARY A DEVELOPMENT STANDARD (LOCAL GOVERNMENT ACT, SECTION 82) GATEWAY LIFESTYLE INVESTMENTS HOLDINGS PTY LTD, 17 MEMORIAL AIRPORT DRIVE, EVANS HEAD****EXECUTIVE SUMMARY**

An application under Section 82 of the Local Government Act 1993 has been received from Ardill Payne & Partners acting on behalf of Gateway Lifestyle Investments Holdings Pty Ltd, owners of land at Lot 1–3 DP1238103, 17 Memorial Airport Drive Evans Head seeking a variation (objection) to the requirements of two clauses in the *Local Government (Manufactured Homes Estate, Caravan Parks, Camping Grounds and Moveable dwellings) Regulation 2005, (the Regulation)*.

The Regulation contains provisions which require manufactured homes be constructed at a place of manufacture outside of the manufactured home estate, i.e. off-site. The objection submitted by Ardill Payne & Partners seeks to allow the manufacture of homes onsite at 17 Memorial Airport Drive Evans Head, where approval for the development of a manufactured home estate has been granted.

Section 82 of the Local Government Act contains provisions which allow an applicant to lodge an objection to a regulation relating to an activity for which approval is sought. The applicant must include the grounds for the objection. If Council is satisfied the objection is well founded, it may, with the concurrence of the Director General, Department of Planning, determine the application. The clause in the subject Regulation for which the objection is sought requires that manufactured homes be constructed off-site rather than onsite.

The subject site is currently vacant but has approval for the development of a manufactured home estate with 199 dwelling sites. A modification to this consent has been submitted and is currently being assessed by Council proposing a reduction of dwelling sites from 199 to 179. The Section 82 Application would see dwellings constructed onsite rather than constructed off-site and transported to the estate.

RESOLUTION 180918/13

Moved: Cr Daniel Simpson

Seconded: Cr Sandra Humphrys

Recommended that:

1. Council support an objection to Clause 36 and Clause 41 of the *Local Government (Manufactured Homes Estate, Caravan Parks, Camping Grounds and Moveable dwellings) Regulation 2005* at Lot 1–3 DP1238103, 17 Memorial Airport Drive, Evans Head for Gateway Lifestyle Investments Holdings Pty Ltd and seek concurrence with the Director General, Department of Planning.
2. Should concurrence be obtained, an approval to operate be issued subject to any conditions recommended by the Director General, Department of Planning, and subject to the special conditions contained in 'Annexure A'.

CARRIED

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18 MATTERS FOR INFORMATION**RESOLUTION 180918/14**

Moved: Cr Robert Mustow
Seconded: Cr Stephen Morrissey

Recommended that the following reports submitted for information be received and noted.

CARRIED**18.1 LOCAL GOVERNMENT FINANCIAL ASSISTANCE GRANTS 2018/2019****RESOLUTION 180918/15**

Moved: Cr Robert Mustow
Seconded: Cr Stephen Morrissey

That Council receive and note the Local Government Financial Assistance Grants 2018/19 September update.

CARRIED**18.2 DEVELOPMENT APPLICATIONS DETERMINED UNDER THE ENVIRONMENTAL PLANNING AND ASSESSMENT ACT FOR THE PERIOD 1 AUGUST 2018 TO 31 AUGUST 2018****RESOLUTION 180918/16**

Moved: Cr Robert Mustow
Seconded: Cr Stephen Morrissey

That Council receive and note the Development Applications Determined for the period 1 August to 31 August, 2018.

CARRIED**18.3 UPDATE ON INSTALLATION OF 100KW SOLAR SYSTEM AT CASINO WATER TREATMENT PLANT****RESOLUTION 180918/17**

Moved: Cr Robert Mustow
Seconded: Cr Stephen Morrissey

That council receive and noted the Update on Installation of 100kw solar system at Casino Water Treatment Plant.

CARRIED

18.4 GRANT APPLICATION INFORMATION REPORT - AUGUST 2018**RESOLUTION 180918/18**

Moved: Cr Robert Mustow

Seconded: Cr Stephen Morrissey

That the Grant Application report for the month of August be received and noted.

CARRIED

18.5 SIGNATURE PROJECTS UPDATE**RESOLUTION 180918/19**

Moved: Cr Robert Mustow

Seconded: Cr Stephen Morrissey

That Council receive and note the Signature Projects update.

CARRIED

18.6 ROAD MAINTENANCE AND CONSTRUCTION SERVICES REVIEW UPDATE ON IMPLEMENTATION ACTIONS**RESOLUTION 180918/20**

Moved: Cr Robert Mustow

Seconded: Cr Stephen Morrissey

That Council receive and note the Road Maintenance and Construction Services Review Update on implementation actions.

CARRIED

18.7 UPDATE ON ASSISTANCE FOR THE EVANS HEAD LIVING MUSEUM**RESOLUTION 180918/21**

Moved: Cr Robert Mustow

Seconded: Cr Stephen Morrissey

That Council receive and noted the Update on Assistance for the Evans Head Living Museum.

CARRIED

19 QUESTIONS ON NOTICE

Nil

20 QUESTIONS FOR NEXT MEETING (IN WRITING)

ORDINARY COUNCIL MEETING MINUTES

18 SEPTEMBER 2018

21 MATTERS REFERRED TO CLOSED COUNCIL**RESOLUTION 180918/22**

Moved: Cr Stephen Morrissey

Seconded: Cr Sandra Humphrys

That Council considers the confidential report(s) listed below in a meeting closed to the public in accordance with Section 10A(2) of the Local Government Act 1993:

21.1 Confidential Report - Update on invitation to participate in Group Action against Industry Supplier - Insurance

This matter is considered to be confidential under Section 10A(2) - (g) of the Local Government Act, and the Council is satisfied that discussion of this matter in an open meeting would, on balance, be contrary to the public interest as it deals with advice concerning litigation, or advice as comprises a discussion of this matter, that would otherwise be privileged from production in legal proceedings on the ground of legal professional privilege. **CARRIED**

The General Manager reported that no written representations had been received in respect to the items listed for consideration in Closed Council.

The Mayor called for verbal representations from the gallery.

There were no representations from the gallery.

RESOLUTION 180918/23

Moved: Cr Stephen Morrissey

Seconded: Cr Jill Lyons

That Council moves out of Closed Council into Open Council at 6.44pm

CARRIED**22 RESOLUTIONS OF CLOSED COUNCIL**

The General Manager read the closed Council resolution;

That

1. Council receive and note the confidential report on the proposed class action.
2. Council consider the legal advice and approve Council's involvement as recommended in the confidential report.
3. Council delegate to the General Manager the authority to enter into agreements with Quinn Emanuel and Harbour Litigation Funding as well as agreements and arrangements with other parties as necessary to participate in the class action as set out in the report.
4. Council authorise the General Manager to enter into and endorse relevant documents and agreements including affixing the seal of Council where appropriate, for the class action generally in accordance with the details contained within this report and the previous Council Report, Confidential Report – Invitation to Participate in Group Action against industry supplier – insurance, dated 21 August 2018.

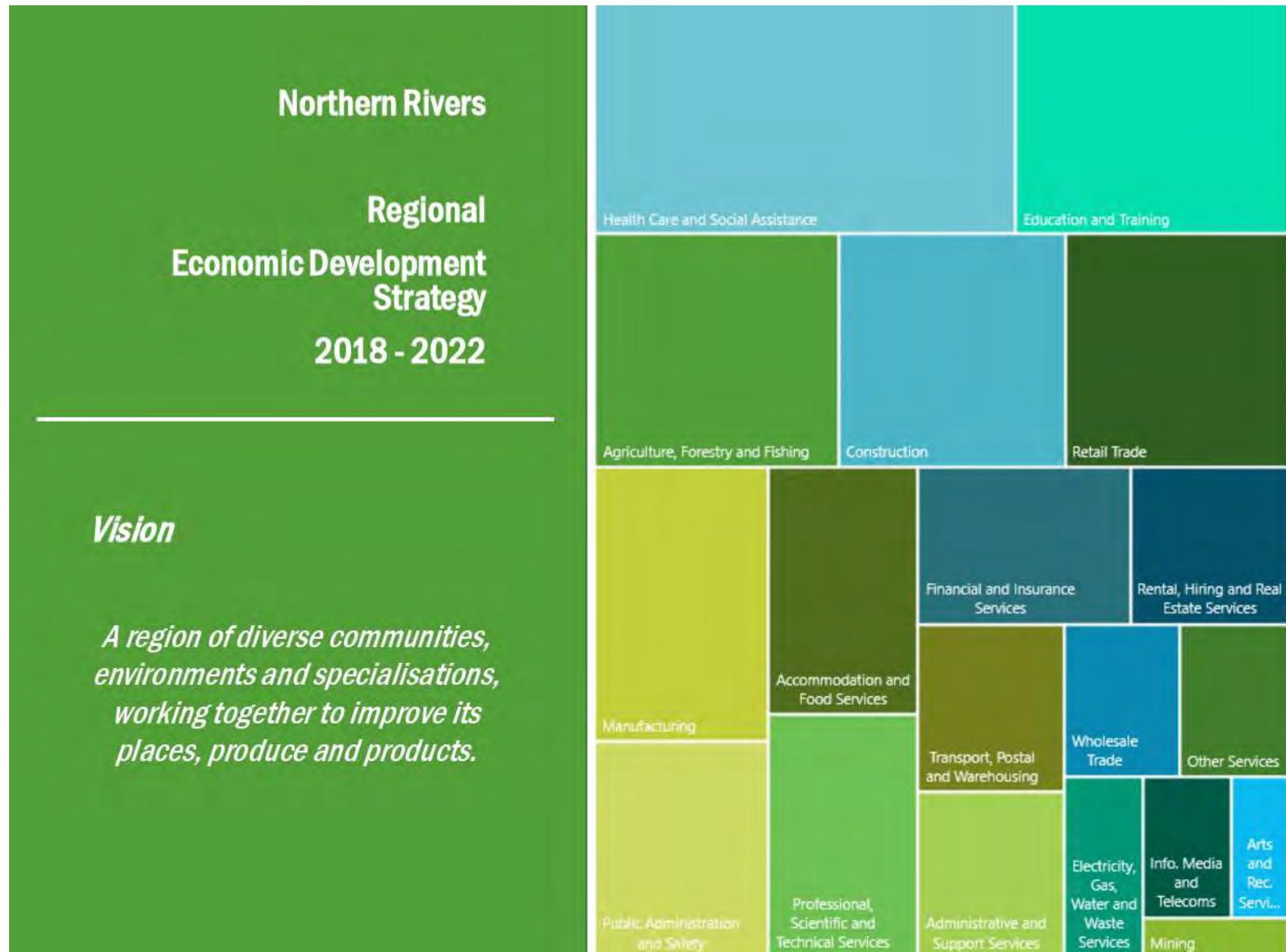
The Meeting closed at 6.45pm.

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The minutes of this meeting were confirmed at the Ordinary Council Meeting held on 16 October 2018.

.....
CHAIRPERSON



Preface

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

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

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

Importantly, the Strategy should be viewed as the first stage of a process that will assist those with an interest in the economic development of the Region, particularly councils, communities and local businesses, in planning their future economic activities. It provides a vehicle for engaging the community in a 'conversation' about regional needs and priorities, assists in bringing together key stakeholders and mobilising resources, and in so doing, can facilitate faster access to dedicated NSW Government funding, such as the Growing Local Economies Fund, as well helping to capitalise upon other economic opportunities.

This Strategy, prepared by Corview on behalf of the Region, was formed in collaboration with Ballina Shire, Byron Shire, Kyogle Council, Lismore City Council, Richmond Valley Council, key stakeholders and the broader regional community, which benefited from economic-analytical assistance from the NSW Government's Centre for Economic and Regional Development (CERD).

It is presented in two documents:

- **Northern Rivers Regional Economic Development Strategy 2018 - 2022 (this document)** which allows the reader to quickly and easily determine key content, while the **Northern Rivers Regional Economic Development Strategy 2018 - 2022 - Supporting Analysis** details the Strategy methodology, evidence and the strategy development process.

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





Introduction

The Northern Rivers Regional Economic Development Strategy 2019-2022 (the Strategy) has been developed to facilitate economic growth across the Northern Rivers (the Region), a widely diversified lifestyle, production and creative services hub.

Past strategies have been based on simple administrative areas – like council boundaries or regional groupings of Councils. While the objective of this Strategy is similar to previous local strategies – to support economic development for social advancement across the community – it takes a new and distinctive approach to strategic economic planning, by using the concept of a Functional Economic Region (FER).

In this Strategy, the Ballina Shire, Byron Shire, Kyogle Council, Lismore City Council, Richmond Valley Council form the Northern Rivers FER (the Region) because of the economic linkages they share across their administrative boundaries. People who work in the Region typically live in the Region, with only 10 per cent of the resident workforce traveling to another region for work.

Fundamental to this approach are the distinctive and unique strengths of the Region. Economic principles suggest unique strengths provide regions with sustainable economic advantages, and so they should be points of focus for regional development policy.

The Northern Rivers' unique strengths were identified through review of:

- the Region today – considering both the Region and its localities for their demographics, infrastructure, institutions and economic structure and opportunities

- endowments - key features of the natural environment, built environment, geography and society specific to the Region or location
- specialisations - the relative composition of resources and activity that lend the Region an advantage in certain economic activities
- stakeholder consultation – 'on the ground' feedback on local economic conditions and forward-looking assessments of opportunities, issues, gaps and risks and initiatives to help shape the future.

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

In this Strategy, the Northern Rivers is shown to have an exceptionally diverse economy. Its key endowments include its coastal, riverine and hinterland amenity; access to South East Queensland; and generally excellent quality infrastructure.

These endowments underpin the attractiveness of the Region to both people and businesses. Areas of specialisation span a multitude of industry sectors, such as Tourism, Agriculture, Food Manufacturing, Health, Education, Retail and a range of professional and business enabling services.

Local consultation revealed an increasing trend in the number of 'creative professionals' (in fields like scientific research, design, information media, arts, architecture, advertising, consulting and management) living in the Region, which increases the innovative potential of its businesses and connects them with expertise found in major capital cities.

These strengths suggest strategic imperatives to:

1. develop its Engines of Growth through better connections to external markets
2. grow tourism activity across the Region consistent with the directions of the North Coast Destination Management Plan
3. foster the development of emerging industries and specialisations, such as Creative Professionals
4. continue to grow the population and internal markets like health, education and retail
5. develop the services precincts of the Region by extending current models of collaboration and partnership.

This Strategy began with its guiding vision for the Region's future.

Next we establish the composition and defining economic characteristics and strengths of the Region today.

Finally, the strategic imperatives suggested by the analysis and stakeholder feedback are established, supported by detailed strategies and actions against the implementation themes.

This Strategy is the culmination of collaboration between the councils of the Region, their respective communities and the NSW Government's CERD.

Background

The Northern Rivers is made up of five councils, spanning from a western agricultural hinterland (Kyogle and Richmond Valley, Casino), through its services hub (Lismore) to coastal communities (Byron, Ballina and some easterly sections of the Richmond Valley).

Two other LGA's, Tweed Shire and Clarence Valley, are often also part of a broader Northern Rivers' administrative grouping, but have been identified as separate regions for economic development purposes.

The Northern Rivers is the home of the Bundjalung Nation, its first people, and offers a wide diversity of environments from beaches, rainforests, rivers and hinterland.

Home to just over 150,000 people, the Region lies 650 kilometres north of Sydney, and 135 kilometres south of Brisbane.

The Region's economic beginnings lie in the timber trade. Overtime, development has seen expansion into agriculture and tourism, which has led to growth in population and business services.

The Region lies at the crossroads of key transport links connecting NSW and Queensland. Its major road links are the Pacific Highway, Bruxner Highway and Summerland Way.

Ballina acts as the Region's main airport with daily services to Newcastle, Melbourne and Sydney. Lismore Airport provides services to Sydney and Grafton.

While beyond the Region, the Gold Coast International Airport provides an important alternative for connections to domestic and overseas markets.



Regional Dashboard – 2016 Census

		Ballina	Byron	Lismore	Kyogle	Richmond Valley
	Estimated 2016 residential population	42,626	32,790	44,054	9,072	23,164
	Population growth rate between 2001 and 2016	+11.4%	+8.4%	+3.6%	-2.4%	+10.9%
	Unemployment rate 2016	5.9%	6.5%	7.8%	8.7%	7.7%
	Personal weekly median income 2016	\$601	\$596	\$550	\$460	\$491
	Top three industries by employment 2016	1. Health Care and Social Assistance 2. Retail Trade 3. Education and Training	1. Health Care and Social Assistance 2. Accommodation and Food 3. Retail Trade	1. Health Care and Social Assistance 2. Retail Trade 3. Education and Training	1. Agriculture 2. Health Care and Social Assistance 3. Retail Trade	1. Manufacturing 2. Health Care and Social Assistance 3. Retail Trade



Snapshot of Population, Economy, Industry and Opportunity

Production & Income by Sector

The figure on the next page presents a key 'roadmap' to understanding economic opportunity in the Region. It reflects the income split between workers and businesses in each sector (blue and orange bars) and how much each industry contributes to regional production (the stacked height of the bars).

The figure shows the Northern Rivers economy is widely diversified. Six industries stand out, together making up more than 50 per cent of the economy. Wages and salaries account for about two-thirds of the Region's income. Eight sectors provide employee income of about \$200 million or more.

Business income in the Northern Rivers is concentrated in Agriculture, Forestry and Fishing, Construction, Financial and Insurance Services, Manufacturing and Retail Trade. Together, these sectors make up more than half of the Northern Rivers' business income.

In analysing the Region's economic features, it can also be useful to group similar industries together to allow review and comparison of some of their common underpinning economic drivers. One useful classification of activities is:

- "Engines of Growth" - activities linked to external markets and opportunities beyond the bounds of the Region, like tourism, agriculture and manufacturing
- "Enabling Industries" - markets within the Region providing key support services to Engines of Growth businesses, like utilities, administrative support services and creative professionals
- "Population Serving Industries" - markets serving the people and communities of the Region, including activities like health, education and retail.

Relative to the structure of NSW's regional economy overall, output and employment in the Northern Rivers is significantly overrepresented in health care, education, utilities, tourism related activities like accommodation and property services, construction and administrative and support services.

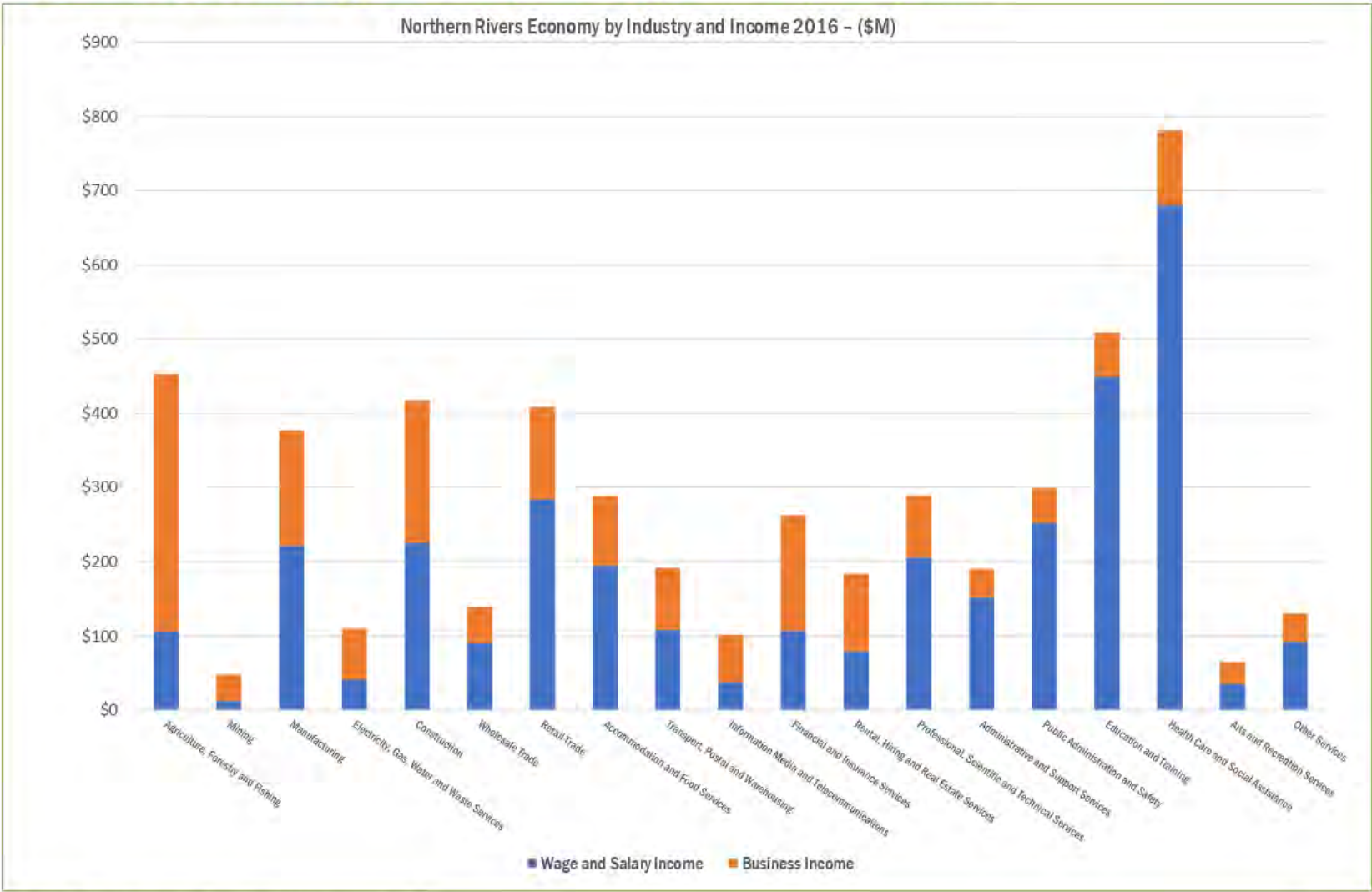
In reflecting on the largest, most productive sectors, it is notable that the 'top six' include two Engines of Growth, Agriculture, Forestry and Fishing and Manufacturing. This demonstrates that while the Region's specialisations are most clearly oriented towards its internal markets, this is supported by traditional 'Engines of Growth' activities.

The CERD has also produced an Input Output table for the Northern Rivers regional economy. The CERD analysis shows the Region is a net importer, with exports estimated at \$1,949 million and imports estimated at \$2,438 million.

The Northern Rivers' leading export industries are Manufacturing, Accommodation & Food Services (Tourism) and Agriculture, Forestry & Fishing. Construction and Manufacturing are the leading industry sources of demand for imports for production processes.

These sources of strength reflect a large, sophisticated economy, with extensive population and visitor-facing advantages, supporting the attractiveness of the Region. Inward migration, sustained over long periods of time, have grown the Northern Rivers' internal, community-focused markets and increased labour supply and the potential for specialisation across a range of activities.

Population, Economy, Industry and Opportunity Snapshot



Source: Cadence Economics, www.cadenceeconomics.com.au



Population Profile

The Northern Rivers has a very large population base relative to other NSW regions. The scale of population means that the internal markets of the Region tend to be larger, deeper and more diversified than is typical for regional NSW.

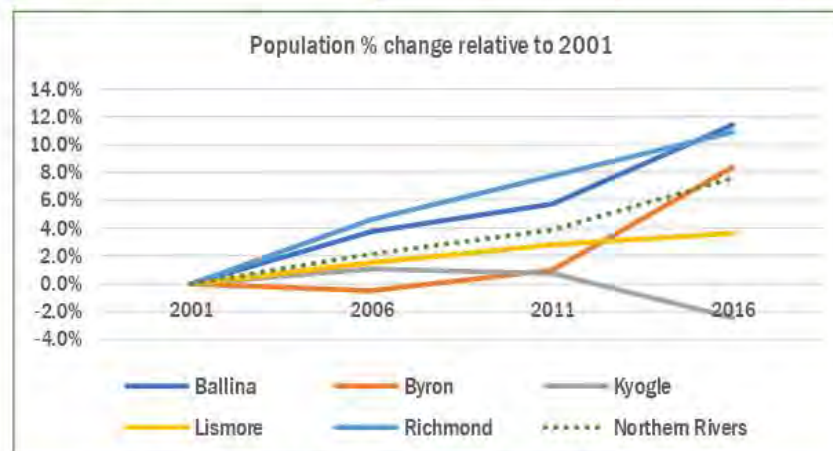
The composition of the Region's demographic profile from the 2016 Census reflects a relatively high number of dependents in the Northern Rivers compared to the NSW community. An older, more dependent profile implies greater demands on the local working age population relative to NSW as a whole, especially in providing late-in-life services like health.

The Northern Rivers' prospects for growth are underpinned by its ongoing success in attracting new residents. The Region's population increased by 8 per cent between 2001 and 2016, below the rates of population growth for NSW and regional NSW. Most locations in the Region have seen growth, with the highest rates in Ballina and Richmond Valley.

More than 14 per cent of the Northern Rivers' 2016 residents lived elsewhere five years previously, reflecting substantial migration into the Region over time. Demographic analysis shows the Northern Rivers is particularly successful in attracting residents from Victoria, Queensland and overseas.

Most people moving into the Region are of young or prime working age – a total of more than 11,500 people in this category in the five years to 2016. However, a significant share of new arrivals are of late working age or older, implying rising demand for age-related services.

	Northern Rivers	NSW	Regional NSW
Age Dependency Ratio (>65 / 15-64)	33.6%	25%	34.8%
Youth Dependency Ratio (<15 / 15-64)	28.1%	28.4%	28.4%
Dependency Ratio	61.7%	53.4%	63.2%
Proportion of Young Persons (<15 / all)	17.4%	18.5%	18.5%
Proportion of Old Persons (>65 / all)	20.8%	16.3%	21.1%
Median Age 2016	44.5	38	42.5



5 Year Migration by Age Group for North Coast Regions (% of total)

Location	Youth	Young & Prime Working Age	Late Working Age & Older
Northern Rivers	2,836 (13.6%)	11,573 (55.7%)	6,340 (30.5%)
Hastings Macleay	2,444 (14.0%)	7,966 (45.6%)	7,045 (40.4%)
Coffs Coast	2,333 (16.1%)	8,005 (55.1%)	4,193 (28.8%)
Tweed Shire	2,389 (13.1%)	8,634 (47.2%)	7,217 (39.5%)
Clarence Valley	1,009 (13.8%)	3,198 (43.8%)	3,085 (42.3%)
Nambucca Shire	456 (13.5%)	1,522 (45.0%)	1,409 (41.7%)

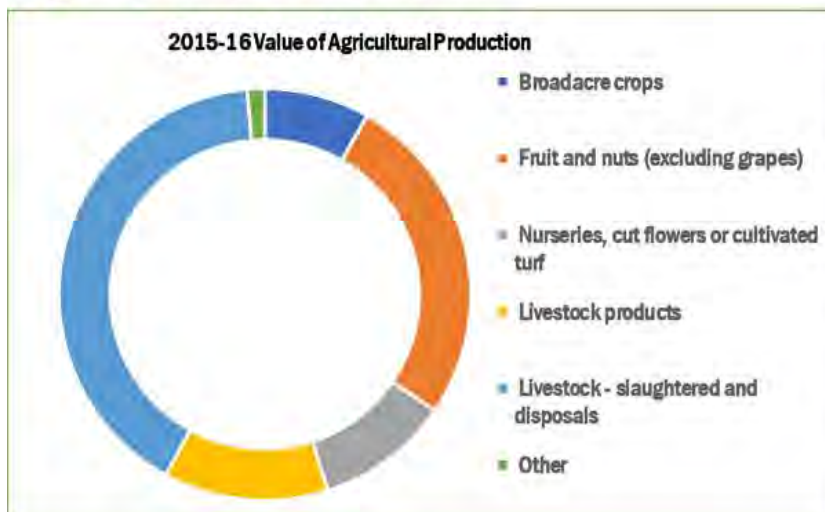
Source: 2016 Census; Corview analysis.

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Population Projections



Agricultural Production



Kyogle and Casino are the Northern Rivers' agricultural hubs

There is significant agricultural activity across the Region. Kyogle and Casino are the primary hubs, focused on cattle, milk and poultry (inland) and cane growing around Evans Head.

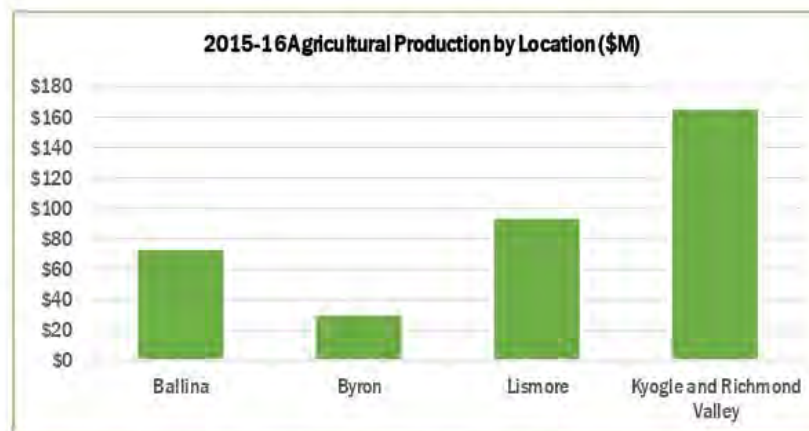
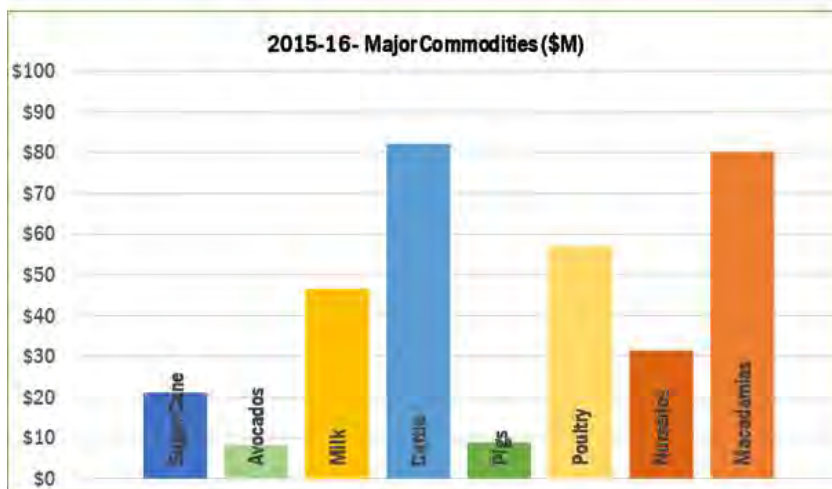
The Ballina and Lismore regions have similar strengths in macadamia and sugar cane production, as well as distinctions (nurseries in Ballina; milk, cattle and poultry production in Lismore). While not as great as elsewhere, Byron Shire still produces significant macadamia, nursery, cattle and milk output.

Cattle, macadamias, poultry and milk are the Northern Rivers' leading commodities

54 per cent of production related to livestock and livestock products.

Cattle is the top commodity of the Northern Rivers, with a 2015-16 production value of \$82 million, followed by macadamias (\$80 million), poultry (\$57 million) and milk (\$47 million).

Caution should be exercised in drawing conclusions from this data, taking into account climatic and cropping variations of the given year.



Data source: Australian Bureau of Statistics, Value of Agricultural Commodities Produced 2015-16 (7503.0) Note the available data does not precisely match LGA boundaries. The available SA2 boundaries have been used to match LGA boundaries to the extent possible.



Endowments

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

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

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

Physical or geographic endowments

Riverine and hinterland amenity – the amenity of the Richmond and Wilsons rivers and hinterland areas are a prime source of appeal attracting visitors and potential residents to the Region.

Coastal amenity – Byron Bay, Ballina and surrounds showcase the coastal offerings that the Northern Rivers are famous for.

Proximity to South East Queensland – the Northern Rivers can easily access the growing markets and opportunities over the border in South East Queensland. About 3.5 million people call South East Queensland home today, projected to rise to 5.3 million over the next 25 years.

Arable land – soils and climate provide the Region with distinct advantages in producing high value agricultural products.

Built endowments

Ballina Airport – Ballina Airport provides an enviable level of air service among regional centres, with plentiful connections to major metropolitan markets.

Pacific Highway – the Pacific Highway serves as the Northern Rivers' principal source of connectivity to major metropolitan markets and gateways.

Lismore Base Hospital – the Level 5 Hospital provides the major referral hospital for the Region, incorporating allied health services.

North Coast Rail Line – the North Coast Railway is the Region's only rail link offering freight and passenger movements to domestic markets.

Bruxner Highway – The Bruxner Highway provides the key source of east-west connectivity within the Region and access to and from markets further inland.

Gold Coast Airport and Precinct – While beyond the boundaries of the Region itself, an international standard airport an hour or so up the Pacific Highway offers the Northern Rivers further connections to major metropolitan markets, as well as into Asia.

Summerland Way – the Summerland Way is the key source of north-south linkage in the Western region, essential to integrating much of Kyogle's LGA. Summerland Way also provides an alternative connection to the Pacific Highway for connecting to other regions and markets.

Private capital equipment – a range of private investments across different sectors including Agriculture, Accommodation, Tourism and Manufacturing support considerable productivity within the Region.



Endowments

The Northern Rivers' endowments support a large, sophisticated Region with an enviable balance of diverse economic opportunities and natural and cultural environments. That balance is proven to be of great appeal to a wide range of people, as reflected both in the profile of visitors to the Region and also its sources of inward migration, drawing heavily from across the states and from overseas. The opportunities for further increases in the productive potential of these endowments will likely continue to expand over time, as its internal markets gain greater depth and further sophistication.

Nonetheless, the Northern Rivers' degree of economic success will be determined by its ability to manage key risks facing the Region. The primary risk is the potential for resource conflict between its rising diversity of stakeholders. Foremost among these is land use conflict, with examples already evident of the development of traditional industries compromised by concerns and consequences on newer activities and community members.

There are also conflicts relating to the use transport networks, with network constraints in other areas forcing integration of freight and commuter traffic on the Bruxner Highway. Additionally, while the councils of the Region demonstrate laudable degrees of partnership and teamwork to identify regional risks, their constituencies are very distinct in some respects, and their current unified institutional strength could easily diminish over time through parochialism.

Institutional endowments

Local Councils – the local councils organise themselves very effectively and advocate for their communities well.

Clean, Green, Organic Branding – the Region's Clean, Green, Organic Branding – reflecting the quality and allure of the natural environment as well as its produce – is a key source of ongoing strength for activities like agriculture, food and ecotourism.

Industry co-operatives and organisations – the business communities of the Northern Rivers are marked by particularly strong co-operatives and organisations. The strength and quality of advocacy within the Region is notable, especially through a "co-op of co-ops", the Cooperatives Alliance.

Southern Cross University – the university is a key attractor of activity to the Region and advocates its merits and potential to outsiders.

Business Incubators and Facilitators – a range of business incubators and facilitators within the Region help generate prosperity and jobs by assisting existing businesses to overcome challenges and grow and while also aiding entrepreneurs in creating new businesses that put their innovative ideas into action.

Northern Rivers Joint Organisation of Councils – provides the Northern Rivers with a key institutional linkage between Councils. The member councils are Ballina, Byron, Kyogle, Lismore, Richmond Valley and Tweed.

State Government Agencies – State agencies play a number of key roles in the Region: as employers; as providers of key services; as leaders and facilitators; as landholders of land that may merit re-purposing; and as regulators of private sector activities.

Balance of Lifestyle, Social, Environmental and Economic Opportunities – the Northern Rivers offers, and is known for, its unique mix of lifestyle and economic opportunities, making it an appealing place to live, work and play in coastal, riverine or hinterland settings. The quality of access to major markets allows residents very broad choices in combining lifestyle with work.

Regional Development Australia Northern Rivers – RDA Northern Rivers serves as a very effective economic development strategist and facilitator of economic development. The RDA's linkages to councils, businesses and industry co-operatives and organisations across the Northern Rivers are enhanced through its role as the Secretariat of Northern Rivers Joint Organisation of Councils.

Cultural & Indigenous Heritage – the Northern Rivers has rich sources of mythology and cultural heritage. This includes the Richmond Valley, home to the origins of the Bundjalung Nation, reflected in the story of the Three Brothers, Mamoonth, Yarbiri and Birrung, and their families.



Specialisations

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

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

The bubble chart selected industries in the regional economy in 2016, where:

- Industries with a larger 'bubble' employed more people
- Industries further above the horizontal line are more specialised when compared to NSW (LQ greater than 1.25), industries below the line are less specialised when compared to NSW
- Industries to the right of the vertical line grew faster between 2011 and 2016 than comparable industries across NSW; industries to the left grew more slowly. This value is calculated as the Region's industry growth rate less than the NSW growth rate for that industry and is expressed in percentage points (ppts).

Compared to general trends for NSW, the largest localised positive employment changes were in activities like Manufacturing; Agriculture, Forestry and Fishing; Utilities and Transport Postal and Warehousing. These changes suggest the strongest gains in relative terms relate to the Region's Engines of Growth.

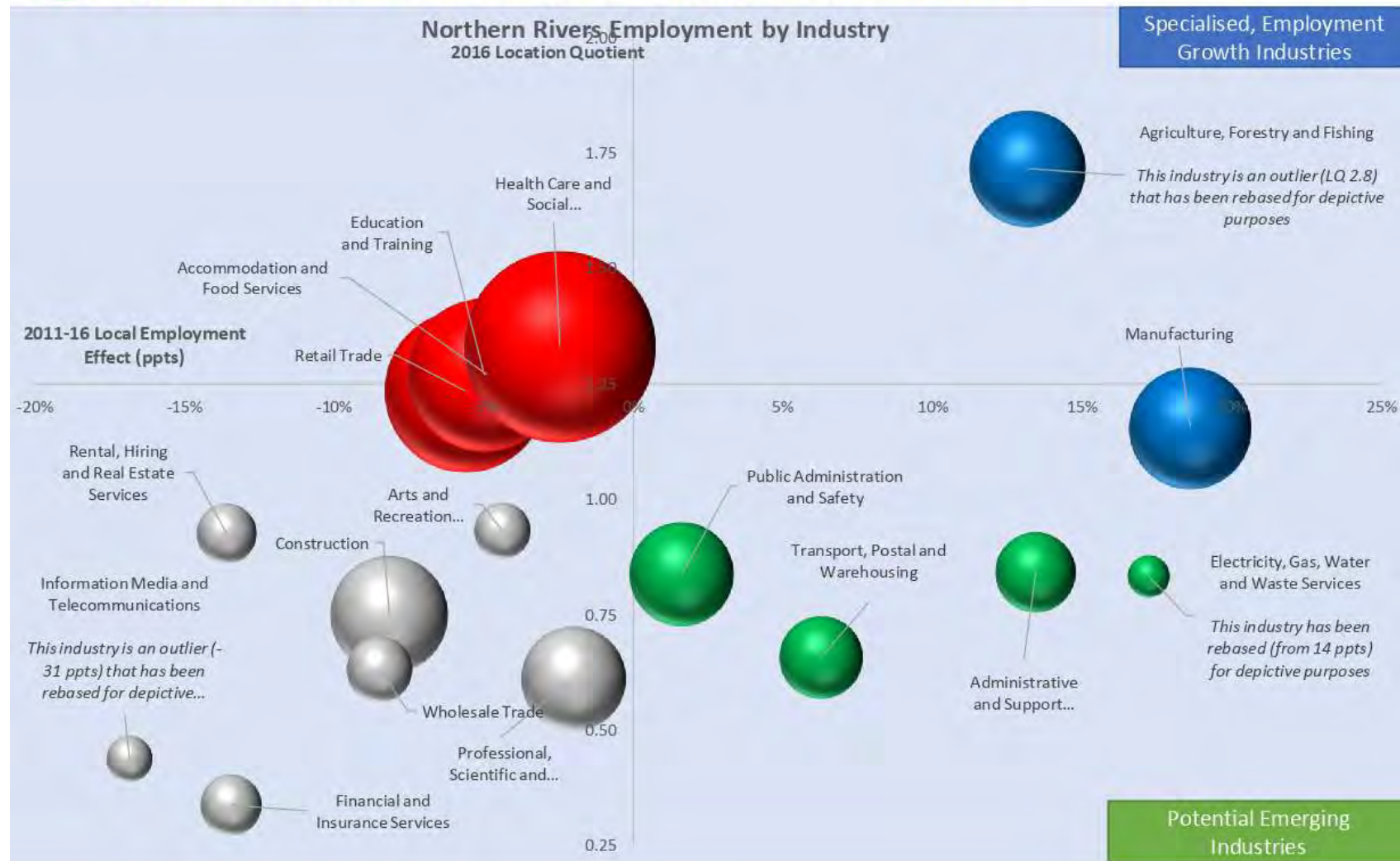
The lowest employment growth related to Enabling Industries like Property Services, Information Technology and Financial Services.

*A region's competitive advantage for an industry includes its ability to produce goods and services at a lower cost or differentiate its products from other regions, along with access to external factors which enhance business and operations/minimize risk (Stimson, Stough and Roberts, 2006).





Specialisations and Shifts in Employment Over Time





Endowments and Specialisations

The primary industry specialisations of the Northern Rivers across the 'Engines of Growth', 'Enabling Industries' and 'Population Serving Industries' groupings are summarised below.

Among the '**Engines of Growth**', the Region's primary specialisations are in Agriculture, Forestry and Fishing, Manufacturing and Accommodation and Food Services (Tourism).

Key sub-industry specialisations include:

1. Sheep, Beef Cattle and Grain Farming
2. Fruit and Tree Nut Growing, Poultry Farming
3. Food Product Manufacturing
4. Wood product Manufacturing
5. Textile, Leather, Clothing and Footwear manufacturing
6. Log Sawmilling and Timber Dressing
7. Accommodation
8. Cafes and Restaurants
9. Pubs, Taverns, Bars

The Region's primary '**Enabling Industries**' are in; Transport, Postal and Warehousing, Administrative and Support Services, Professional, Scientific and Technical Services, Rental Hiring and Real Estate Services and Information Media and Telecommunications.

If the trend of creative professionals moving to the Region continues, creative industries could transition from being an Enabling Industry to an Engine of Growth.

Key sub-industry specialisations include:

1. Road Transport
2. Postal Courier Pick-up and Delivery Services
3. Building Cleaning, Pest Control and Gardening Services
4. Administrative Services
5. Legal and Accounting Services Real Estate Services and Property Operators
6. Architectural, Engineering and Technical Services
7. Creative and Performing Art Activities
8. Software and Print Publishing

Among '**Population Serving Industries**', the Northern Rivers primary specialisations are in Health Care and Social Assistance, Education and Training, Retail Trade and Public Administration Safety.

Key sub-industry specialisations include:

1. Medical and Other Health Care Services
2. Social Assistance Services
3. Residential Care Services
4. Preschool and School Education
5. Tertiary Education
6. Supermarkets, Department Stores, Motor Dealerships, Fuel, Pharmaceutical & Electronic Goods Retailing
7. Public Administration
8. Residential Construction

Risks

Through consultation, the community contributed to the Strategy development process, including identifying issues today that may be central to the economic future. This included a range of risks that may impede the Northern Rivers from achieving its economic potential.

Addressing these risks is essential to realising this Strategy's economic vision for the Region.

Connectivity risks:

- Despite a high standard of built infrastructure, some poorer quality transport links constrain access to markets, with freight having to travel along congested commuter routes.
- There is a perception that there is insufficient data on freight movements to properly inform transport investment decisions.
- Unreliable or limited digital coverage, capacity and reliability across the Region impedes the adoption of technology and hampers the development of emerging professional services industries.
- A lack of transport services means the communities, precincts and places of the Region are less integrated and productive than they should be.
- Road constraints damage local productivity and limit opportunities to distribute Byron visitors across the Region.

Resources risks:

- Ongoing inward migration increases conflict between 'tree-changers' and traditional agricultural, tourism and industrial land uses.
- Limited scale of some agricultural properties inhibits productivity.
- Labour shortages inhibit the degree to which the Region realises the benefits of growing demand for population services like the NDIS.
- High cost and limited reliability of energy constrains the development of manufacturing activities.

Liveability risks:

- High cost housing hampers the rate of increase in the Region's population and internal markets.
- Cultural, sporting and social infrastructure are inadequate to attract and retain families.
- Amenity for residents and productivity for businesses is hampered by limited integration in and between services precincts.
- Limitations in the housing stock mean older people leave their communities and lose their independence earlier than necessary.
- Drug use and lack of treatment options creates negative perceptions of the Northern Rivers as a place to move to.

- Finding affordable housing and appropriate work in some parts of the region can be difficult.

New Ideas Risks:

- Heavy handed approaches to regulation unnecessarily constrain opportunities.
- Slow and unpredictable development consent outcomes increase risks and make development infeasible.
- Traditional problems with intergovernmental relations (lack of coordination and blame and cost shifting) are sustained, reducing the growth potential of the Region.

Other Risks:

- Institutional – the strong institutional administrative partnerships in place today may be eroded over time by parochialism.
- Economic – slower growth across Asia reduces the market for Northern Rivers' produce.
- Environmental and societal – population growth places pressure on the local environment.



The five Strategy elements for the Region link directly to the opportunities presented by the Region's endowments and specialisations and also aim to address some key regional risks.

The Strategy elements were derived from an analysis of the endowments that underpin the Region's specialisations, followed by examination of current industry specialisations and emerging specialisations, identified in consultation with the community and councils.

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

Northern Rivers' key specialisations lie in:

- agriculture, food manufacturing and logistics chain workers in the western hinterland
- health, human services and retail in the regional hub, Lismore
- tourism, creative professionals and traditional business enabling services in coastal areas.

The specialisations suggest some key strategic imperatives:

1. develop its Engines of Growth through better connections to external markets
2. grow tourism activity across the Region consistent with the directions of the North Coast Destination Management Plan
3. foster the development of emerging industries and specialisations, such as Creative Professionals
4. continue to grow the population and internal markets like health, education and retail
5. develop the services precincts of the Region by extending current models of collaboration and partnership.



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1. Develop the 'Engines of Growth' through Better Connections to External Markets

Strategic Context

The Northern Rivers is home to a diverse range of agricultural and manufacturing activities making the most of its rich natural endowments, mature supply chains and extensive workforce capabilities. Sophisticated industry bodies see industry players advocate effectively for their collective interests and share knowledge and capability for the broader benefit of the Region.

A key remaining constraint on these 'Engines of Growth' is the quality of connections to external markets. High productivity truck configurations are not feasible on extensive sections of the Bruxner Highway and Summerland Way, and poor quality local roads in some highly productive agricultural areas. Addressing these constraints can improve the efficiency of the freight task, delineate freight and passenger movements, maximise benefits to northern NSW from Inland Rail and position the Region to make the most of the burgeoning growth in demand in national and international markets for goods and produce.

Infrastructure Priorities

Investment programs for the Bruxner and Summerland Way corridor strategies and Fixing Country Roads candidate projects

Opportunities	Actions	Candidate Projects
<ul style="list-style-type: none"> • Improve the efficiency of freight movements within and beyond the Northern Rivers • Realise seamless 'farm gate to gateway' with supply chain connections to national global markets through a better integrated local and regional transport networks • Delineate freight and passenger movements where possible • Engage the private sector to provide industry insight when developing business cases • Improve road corridor productivity and safety. 	<ul style="list-style-type: none"> • Work with TfNSW to progress the Bruxner and Summerland Way corridor strategies • Develop program business cases: <ul style="list-style-type: none"> • for the Bruxner Highway west of Lismore • Summerland Way improvements to address b-double constraints beyond Kyogle • Work with TfNSW to identify initiatives to maximise benefits to Northern NSW from Inland Rail • Work with TfNSW and industry in reviewing regional freight forecasts to account for growth in Tabulam and other regions • Identify, cost and prioritise Fixing Country Roads 'last mile' candidate projects • Identify key localised congestion issues affecting regional transport and logistics routes and develop business cases for improvements 	<ul style="list-style-type: none"> • Summerland Way realignment and upgrade program • Western Bruxner freight productivity program • Eastern Bruxner regional connectivity program • Kyogle Town Centre Bypass • Ballina-Byron Gateway Airport Stage Three • 'First Mile' / 'Last Mile' Fixing Country Roads Investment program • Bridge Upgrades: <ul style="list-style-type: none"> • Hollingworth Bridge • Duplication of Ballina Bridges • North Creek Bridge • Road Upgrades: <ul style="list-style-type: none"> • Oliver Avenue – Pineapple Road • Alternative route to Bruxner Highway • Alphadale Road • Union street – roundabout • Bruxner Highway/Ballina Road interchange at Lismore • Pacific Highway - Ballina Bypass – Cumbalum Interchange.



2. Grow Tourism Opportunities Across the Region

Strategic Context The Northern Rivers is Northern NSW's key tourism hub, with Byron Shire the most iconic tourist destination in the Region. The Region's appeal to visitors is largely focused on the combination of local culture and the tremendous beauty of its natural features, with millions of visitors drawn to its beaches, hinterlands and rainforests significantly contributing to the jobs and incomes of the Region's communities.

However, the Region's popularity with visitors is not without costs and challenges. The quality of transport infrastructure allows visitors to enter the Region relatively easily, but constraints on local roads impede the progress of visitors and locals alike. There is also the opportunity to diversify and disperse tourism activity across the Region to diminish the costs of congestion and increase benefits through longer lengths of stay. Priority measures should include upgrading Ewingsdale Road, advancing the Ballina Marina proposal, developing nature-based tourism opportunities beyond the coastline (especially in rainforest settings), using the power of its Aboriginal mythology and culture, and capitalising on its food and agritourism opportunities.

Infrastructure Priorities Ewingsdale Road upgrade program and Ballina Marina and sand bar works.

Opportunities	Actions	Candidate Projects
<ul style="list-style-type: none"> • Provide enabling infrastructure to expand tourism opportunities 	<ul style="list-style-type: none"> • Advance the business case for stage 1 of the Ewingsdale Road upgrade program (Byron bypass) 	<ul style="list-style-type: none"> • Ewingsdale Road upgrade program, including Byron Bay Town Centre bypass
<ul style="list-style-type: none"> • Improve road corridor productivity and safety 	<ul style="list-style-type: none"> • Develop a business case for Ballina Marina and sand bar works 	<ul style="list-style-type: none"> • Ballina Marina
<ul style="list-style-type: none"> • Support the development of whole-of-region branding for Northern Rivers products and experiences 	<ul style="list-style-type: none"> • Investigate opportunities to increase whole-of-region branding and marketing of products and services • Develop tourism opportunities in the Northern Rivers, focusing on coastal and inland World-Heritage sites, food and creative industries 	<ul style="list-style-type: none"> • Ballina sand bar works • Food Industry Hubs in the Northern Rivers • Northern Rivers Rail Trail • Bangalow Road (Byron) upgrade.



3. Foster the Development of Emerging Industries and Specialisations

Strategic Context

The Northern Rivers has a depth and diversity of economic activity close to being unrivalled among the regions of NSW. Recent trends suggest these advantages are growing over time, with a range of emerging industries and activities beginning to flourish in the Region, supported by a range of institutions fostering business support and development. The significant increase in the number of 'creative professionals' living in the Region increases the innovative potential of its businesses and connects them with expertise found in major capital cities and beyond.

The Northern Rivers can take a range of steps to better cultivate the development of its emerging industries. These include providing common use infrastructure, like an Innovation Hub, improving digital connectivity, supporting changes in land use and aligning education and training more closely with current and prospective industry needs.

Infrastructure Priorities

Byron Innovation and Entrepreneur Hub and digital infrastructure.

Opportunities


- Support the expansion and accessibility of offerings at Southern Cross University Lismore
- Provide local training courses that are responsive to local industry needs
- Facilitate the development of emerging clusters, specialisations and businesses
- Provide land use zoning and enabling infrastructure to activate land use change and allow increases in production
- Connect the people and businesses of the Region to digital networks and technologies to a first-rate standard.

Actions

- Investigate opportunities to improve regional connectivity to the SCU campus
- Develop the Byron Innovation and Entrepreneur Hub
- Advocate for an innovation, entrepreneurial and enabling industry SkillsPoint in the Northern Rivers
- Extend the influence of business incubators to support small business development across the Region
- Work closely with RDA Northern Rivers and industry co-ops and associations to identify common use infrastructure investment and land use opportunities
- Investigate a regional renewable energy initiative
- Engage with NSW State Government to activate Crown Land that is identified in future land use strategies
- Develop a Region-wide digital black spots map and identify rectification projects.

Candidate Projects

- Byron Innovation and Entrepreneur Hub
- Reynolds Road Casino Industrial Precinct
- Casino Industrial Activation power supply upgrade project
- Kyogle Creativity Hub
- Lismore CBD Highspeed Broadband
- Tabulam Agribusiness Precinct
- Southern Cross Industrial Precinct (Ballina)
- Lismore renewable energy initiative.



4. Grow the Population and Internal Markets of the Region

Strategic Context

The Northern Rivers has a large population compared to most of NSW regions, supporting sophisticated internal markets, high capability, economic diversity and specialisation in enabling and population serving activities. Large markets provide advantages of scale for producers, reinforced over time by ongoing population growth.

The Northern Rivers has the opportunity to sustain ongoing economic development, but it is not without challenges. Foremost among these issues is facilitating new housing supply, including provision of key enabling infrastructure and greater diversity in dwellings. Improved community infrastructure and services can also play a secondary role in ensuring population growth does not undermine living standards or quality of life for existing residents.

Infrastructure Priorities

A potential catalogue of infrastructure projects enabling new housing supply; community infrastructure.

Opportunities	Actions	Candidate Projects
<ul style="list-style-type: none"> Accommodate growth in a manner that balances population pressures with infrastructure delivery to maintain the lifestyle character of the region Diversify the supply of housing types to meet the needs of the community Pursue new ways of celebrating indigenous and multicultural heritage Improve access to cultural, sporting and recreational facilities and services in the Northern Rivers 	<ul style="list-style-type: none"> Develop a regional catalogue of residential lands for activation and proactively seek funding opportunities for enabling infrastructure to accelerate housing supply Work with the Department of Planning to assess development feasibility of different housing choices across the Region Link targeted precinct planning outcomes to public transport, school transport and community transport requirements Work with public transport, school transport and community transport to inform TfNSW reviews Develop an entertainment and convention centre proposal on a regional basis. 	<ul style="list-style-type: none"> Enabling infrastructure projects for the Housing Acceleration Fund Activation of residentially zoned Crown land Convention Centre Sewerage System Program – Kyogle villages Ballina Shire Road Network Strategy Regional public, school and community transport strategy Regional Sports Precinct



5. Develop the Services Precincts of the Region through New Approaches to Partnership

Strategic Context

Lismore serves as the Region's services hub, with many customers or workers commuting significant distances to receive or provide its high-quality offerings.

Within Lismore there are a number of distinctive precincts or clusters, including for health, education, retail, sporting and cultural facilities. Recognising the role these precincts play in the broader Region, Lismore City Council has demonstrated the leadership and foresight to implement a Partnerships Strategy that promotes collaboration across its own community, neighbouring councils and other institutions to help improve assets and services.

The opportunity for the Region is to extend the current Partnerships Strategy to the next level, accounting for whole-of-region needs and opportunities and investigating new forms of partnership with the State and Federal Governments.

Infrastructure Priorities

Partnerships Strategy Investment Program, including a Central Growth Corridor Program for Lismore.

Opportunities

- Pursue current opportunities for new forms of partnership with the State and Federal Government
- Adopt a "customer focused" approach to regulating activities, not just delivering services
- Improve and integrate precincts through effective transport connections.

Actions

- Extend Lismore's Partnerships Strategy to a whole of region, intergovernmental basis
- Work with the Department of Planning and Environment to undertake holistic precinct planning in Lismore and improve Regional precinct integration in alignment with the Central Growth Corridor Strategy
- Investigate potential harmonisation of cost and regulatory impositions
- Work with TfNSW to progress Future Transport plans for improved connectivity between Regional Cities and Centres, including public and community transport requirements and new bus and coach service improvements.

Candidate Projects

- Partnerships Strategy Investment Program, including a Central Growth Corridor Program
- NSW and QLD cross-border comparative business cost study (undertaken jointly with Tweed Shire).
- Smart Cities projects

Implementation Plan

Strategy implementation will be overseen by an Economic Advisory Panel of the General Managers of the councils of the Region, drawing on their staff and broader stakeholders as appropriate.

The effective implementation of the Strategy will involve the key stakeholders and regional community that contributed to its development, including the five councils as well as State Government agencies and local entities.

The completion of this document is intended to be the first stage of an ongoing process where new specific actions to further progress towards the Vision are identified through application of the framework.

The five council General Managers will meet regularly to track progress and liaise with the Regional Director, North Coast, NSW Department of Premier and Cabinet. These meetings could also be used to check the Strategy's progress and review against current grant opportunities.

After two years, the Advisory Panel will initiate the conduct of a formal review of the Action Plan and associated governance processes, producing a brief report card to be published as an addendum to the Economic Development Strategy.

This will also provide an opportunity to update the Action Plan for new or modified actions in view of key economic, social, environmental and policy changes.

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



Northern Rivers Enablers Table

Strategies and Early Stage Actions					
Enablers	Develop the Engines of Growth through Better Connections	Grow Tourism Opportunities	Foster Emerging Industries & Specialisations	Grow the Population & Internal Markets	Develop Services Precincts Through New Approaches to Partnership
People and Skills			<ul style="list-style-type: none"> Investigate opportunities to improve regional connectivity to the SCU campus Advocate for an innovation, entrepreneurial and enabling industry SkillsPoint in the Northern Rivers Extend the influence of business incubators to support small business development across the Region Engage with NSW State Government to activate Crown Land that is identified in future land use strategies 		
Utilities			<ul style="list-style-type: none"> Develop a Region-wide digital black spots map and identify rectification projects. 		

Northern Rivers Enablers Table

Strategies and Early Stage Actions					
Enablers	Develop the Engines of Growth through Better Connections	Grow Tourism Opportunities	Foster Emerging Industries & Specialisations	Grow the Population & Internal Markets	Develop Services Precincts Through New Approaches to Partnership
Government, regulation, services and information	<ul style="list-style-type: none"> Work with TfNSW to identify initiatives to maximise benefits to Northern NSW from Inland Rail Work with TfNSW and industry in reviewing regional freight forecasts to account for growth in Tabulam and other regions. 	<ul style="list-style-type: none"> Investigate opportunities to increase whole-of-region branding and marketing of products and services Develop tourism opportunities in the Northern Rivers, focusing on coastal and inland World-Heritage sites, food and creative industries 	<ul style="list-style-type: none"> Engage with NSW State Government to activate Crown Land that is identified in future land use strategies 	<ul style="list-style-type: none"> Work with the Department of Planning to assess development feasibility of different housing choices across the region Link targeted precinct planning outcomes to public transport, school transport and community transport requirements Undertake a region wide review of public transport, school transport and community transport to inform TfNSW reviews 	<ul style="list-style-type: none"> Extend Lismore's Partnerships Strategy Advocate for a Northern Rivers City Deal Work with the Department of Planning and Environment to undertake holistic precinct planning in Lismore Investigate potential harmonisation of cost and regulatory impositions Improve connectivity between Regional Cities and Centres, including public and community transport requirements and new bus and coach service improvements.

Northern Rivers Enablers Table

Strategies and Early Stage Actions					
Enablers	Develop the Engines of Growth through Better Connections	Grow Tourism Opportunities	Foster Emerging Industries & Specialisations	Grow the Population & Internal Markets	Develop Services Precincts Through New Approaches to Partnership
Infrastructure	<ul style="list-style-type: none"> Progress the Bruxner and Summerland Way corridor strategies Develop program business cases: <ul style="list-style-type: none"> for Bruxner Highway west of Lismore Summerland Way Identify, cost and prioritise Fixing Country Roads 'last mile' candidate projects Identify key localised congestion issues affecting regional transport and logistics routes and develop business cases for improvements. 	<ul style="list-style-type: none"> Advance the business case for stage 1 of the Ewingsdale Road upgrade program (Byron bypass) Develop a business case for Ballina Marina and sand bar works 	<ul style="list-style-type: none"> Develop the Byron Innovation and Entrepreneur Hub Work closely with RDA Northern Rivers and industry co-ops and associations to identify common use infrastructure investment and land use opportunities Investigate a regional renewable energy initiative 	<ul style="list-style-type: none"> Develop a regional catalogue of residential lands for activation and pro-actively seek funding opportunities for enabling infrastructure to accelerate housing supply Develop a entertainment and convention centre proposal on a regional basis. 	<ul style="list-style-type: none"> Improve Regional precinct integration in alignment with the Central Growth Corridor Strategy

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Published: August 2018 Photos Courtesy of Member Councils

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Developed with the support of the NSW Government as part of the Regional Economic Development Strategies program to assist local councils and their communities in regional NSW.



Northern Rivers 2018 - 2022

Regional Economic Development Strategy

Supporting Analysis



Richmond
Valley
Council

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Preface

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

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

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

Importantly, the Strategy should be viewed as the first stage of a process that will assist those with an interest in the economic development of the region, particularly councils, communities and local businesses, in planning their future economic activities. It provides a vehicle for engaging the community in a 'conversation' about regional needs and priorities, assists in bringing together key stakeholders and mobilising resources, and in so doing, can facilitate faster access to dedicated NSW Government funding, such as the Growing Local Economies Fund, as well helping to capitalise upon other economic opportunities.

This Strategy, prepared by Corview on behalf of the Region, was formed in collaboration with Ballina Shire, Byron Shire, Kyogle Council, Lismore City Council, Richmond Valley Council, key stakeholders and the broader regional community, which benefited from economic-analytical assistance from the NSW Government's Centre for Economic and Regional Development (CERD).

The Strategy is presented in two documents, the **Tweed Shire Regional Economic Development Strategy 2018-2022** which allows the reader to quickly and easily determine key content, while the **Tweed Shire Regional Economic Development Strategy 2018-2022 – Supporting Analysis (this document)** details the Strategy methodology, evidence and the Strategy development process.

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

Appendices

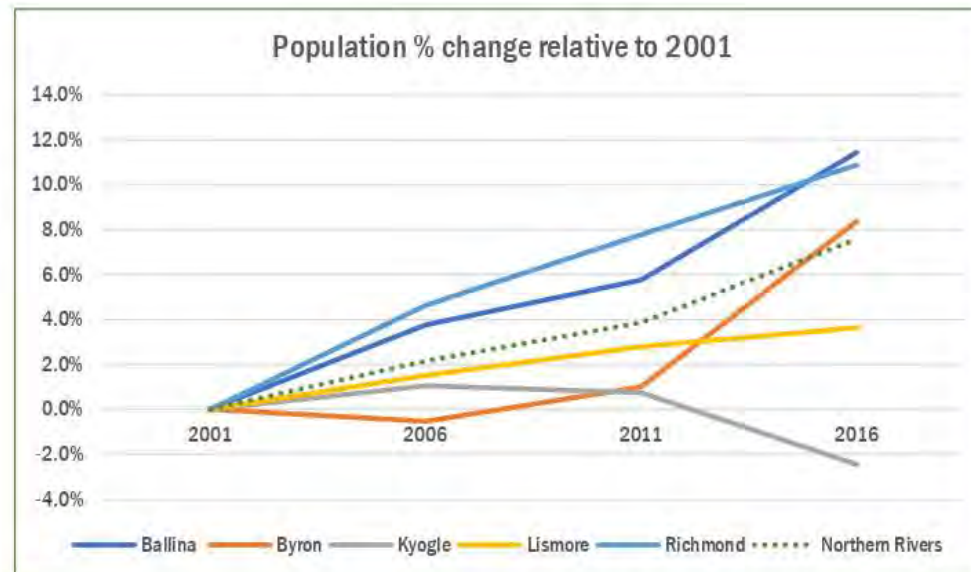
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Appendix A – The Northern Rivers Economy

Population Profile

The Northern Rivers regional economy has a population of approximately 148,000.

The population increased by 7.6 percent (11,000) across the Region from 2001 to 2016. The Region's rate of growth was significantly lower than both NSW (+18 percent) and Sydney (+21 percent).



Resident Profile

Older members of the population are generally overrepresented in regional areas, with the Northern Rivers no exception to this trend.

The median age in the Northern Rivers is 44.5, higher than both the NSW and Regional NSW medians (38 and 42.5), with a markedly higher age dependency ratio than for NSW overall.

The Northern Rivers' share of underage dependents is closer to the typical NSW and Regional NSW shares.

	Northern Rivers	NSW	Regional NSW
Age Dependency Ratio (>65 / 15-64)	33.6%	25%	34.8%
Youth Dependency Ratio (<15 / 15-64)	28.1%	28.4%	28.4%
Dependency Ratio	61.7%	53.4%	65.4%
Proportion of Young Persons (<15/all)	17.4%	18.5%	18.5%
Proportion of Old Persons (>65/all)	20.8%	16.3%	21.1%
Median Age 2016	44.5	38	42.5

Age Profile

The age location quotients to the right show the relative representation of age groups in the Northern Rivers Region compared to either the NSW composition or regional NSW composition.

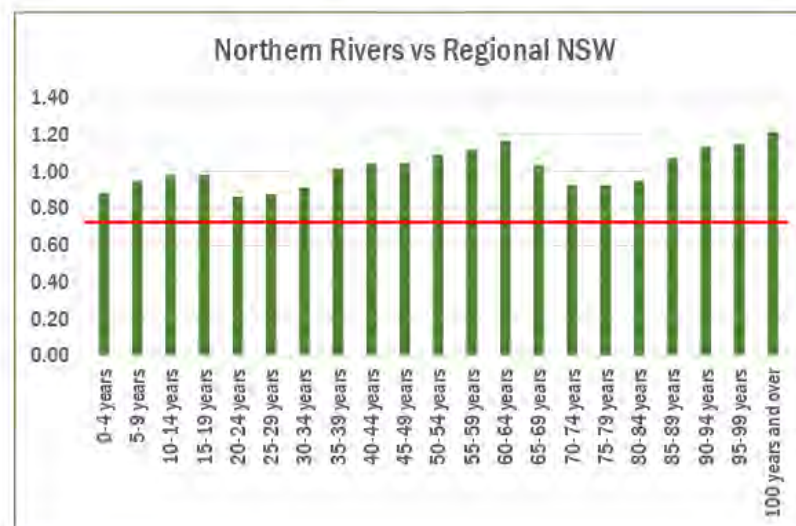
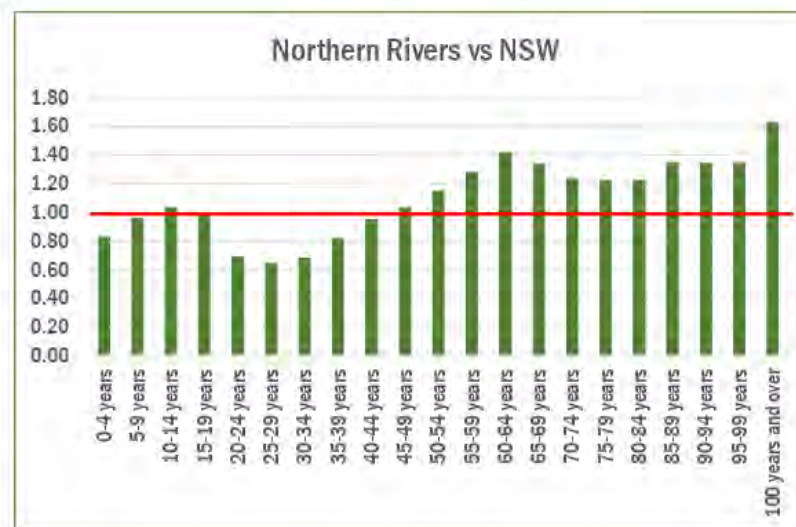
A ratio of 1 means the relative representation of this age cohort in the Northern Rivers exactly matches the reference group. In this way, the ratio can be used to assess the degree to which an age cohort is overrepresented (greater than 1) or underrepresented (less than 1) in the Northern Rivers.

Compared to NSW, the Northern Rivers is markedly underrepresented for those of young working ages through to the early stages of middle aged life.

For the age ranges of 20 to 39 years, the degree of underrepresentation is such that the cohort shares are between 20 to 35 per cent below those for NSW as a whole. Representation of children under 5 is also lower than the State share, which is consistent with underrepresentation in the age ranges for early parenthood.

The reverse applies to the ages of 50 and beyond, with the Northern Rivers anywhere between 20 per cent to more than a third higher than the prevailing NSW proportion.

The demographic composition of the Northern Rivers is less distinctive when compared to Regional NSW. Nonetheless, the cohort shares still suggest relative underrepresentation of people of early working age to early middle age, along with fewer very young children, and an overrepresentation of those approaching retirement age.



Migration Trends

Review of 2016 Census data on migration trends reflects more than 14 per cent of residents lived elsewhere five years previously. This represents substantial migration into the Region, albeit lower as a proportion of the population than for other North Coast Regions.

In absolute terms, migration is very substantial, with people moving to the Northern Rivers in large numbers from elsewhere in NSW, Queensland, Victoria, other states and overseas. In relative terms, the Northern Rivers appears to have special appeal to people moving from Victoria, other states or overseas.

The Northern Rivers also appears to have particular capacity to draw in people of young to prime working age. More than half of all migrants into the Region fit into this category, with only 3 in 10 arrivals of late working age or older.

Usual Residence 5 years Previous to the 2016 Census for North Coast Regions

Location	Same Region	Another Region	Not Stated / Not Applicable
Northern Rivers	70.7%	14.2%	15.2%
Hastings Macleay	69.5%	16.4%	14.1%
Coffs Coast	68.9%	17.2%	13.8%
Tweed Shire	66.0%	20.1%	13.9%
Clarence Valley	71.6%	14.4%	14.0%
Nambucca Shire	68.4%	17.3%	14.4%

Sources of Migration into North Coast Regions (from 5 years previous)

Location	Metro NSW	QLD	Other North Coast	Other Regional NSW	VIC	Other States	Overseas
Northern Rivers	4,130	5,295	1,980	2,860	1,757	1,716	2,814
Hastings Macleay	5,618	1,983	1,127	5,242	734	1,193	1,344
Coffs Coast	2,921	2,274	1,873	2,839	999	1,224	2,231
Tweed Shire	2,595	8,110	1,984	1,609	960	1,228	1,700
Clarence Valley	1,024	1,907	1,494	1,434	302	539	449
Nambucca Shire	702	507	766	721	152	228	159

5 Year Migration by Age Group for North Coast Regions (% of total)

Location	Youth	Young & Prime Working Age	Late Working Age & Older
Northern Rivers	2,836 (13.6%)	11,573 (55.7%)	6,340 (30.5%)
Hastings Macleay	2,444 (14.0%)	7,966 (45.6%)	7,045 (40.4%)
Coffs Coast	2,333 (16.1%)	8,005 (55.1%)	4,193 (28.8%)
Tweed Shire	2,389 (13.1%)	8,634 (47.2%)	7,217 (39.5%)
Clarence Valley	1,009 (13.8%)	3,198 (43.8%)	3,085 (42.3%)
Nambucca Shire	456 (13.5%)	1,522 (45.0%)	1,409 (41.7%)

Housing Ownership & Affordability

Outright ownership of homes is relatively high in all locations across the Northern Rivers compared to the NSW State average.

Mortgage payments across all locations are below the State average, although repayments vary considerably across the Region, with payments in Kyogle about two-thirds of levels in Ballina and Byron. Rents are also generally well below the State average, excepting Byron.

Location	% of Dwellings Owned Outright	Monthly Mortgage Repayments	Median Weekly Rent
Ballina	41.0%	\$1,733	\$340
Byron	36.5%	\$1,733	\$400
Kyogle	45.8%	\$1,100	\$200
Lismore	35.6%	\$1,430	\$260
Richmond Valley	38.6%	\$1,300	\$250
NSW	32.2%	\$1,986	\$380

Educational Attainment

The Northern Rivers have a lower amount of its population with a Bachelor or Postgraduate qualification (17.8 per cent) when compared to the NSW average (24.2 per cent).

However, a higher proportion of its population are qualified at Certificate Level (21.1 per cent to 16.6 per cent).

	Northern Rivers	NSW
Bachelor or Postgraduate Qualification	17.8%	24.2%
Advanced Diploma	12.2%	11.8%
Certificate Level	21.1%	16.6%

Internet Connection in Dwellings

The Northern Rivers has a lower amount of its population (78.6 per cent) connected to the internet than the NSW (82.5 per cent).

	Northern Rivers	NSW
Internet not accessed from dwelling	18.2%	14.7%
Internet accessed from dwelling	78.6%	82.5%
Not stated	3.2%	2.8%

Indigenous Population

The Northern Rivers has a markedly higher proportion (4.1 per cent) of Aboriginal and/or Torres Strait Islander citizens in its population than NSW as a whole (2.9 per cent).

In relative terms, the representation of Aboriginal and Torres Strait Islander citizens in the Northern Rivers population is about 40 per cent higher than NSW's composition overall.

	Northern Rivers	NSW
% of Population Aboriginal and/or Torres Strait Islander People	4.1%	2.9%

Occupation Profile and Labour Mobility

Professionals, Technicians and Trades Workers and Managers are the leading occupational classifications of the Region, with Professionals 50 per cent more numerous than any other occupation.

Each of these leading classifications makes up between 13 and 21 per cent of the labour force, and together account for just under half of all workers.

When compared to the overall composition of the State's labour force, the Northern Rivers is:

- most overrepresented for Labourers and Community & Personal Service Workers
- not overly underrepresented for any occupation, with all classifications represented to at least 80 per cent of the composition of the State's labour pool.

Most areas of regional NSW are typically underrepresented in one occupation or another. The balance of representation across the Northern Rivers is consistent with its relatively deep labour pools and extensive economic diversity.

Review of labour flows reflects a relatively high rate of self containment in the Northern Rivers. Around 9 out of 10 workers living in the Region also work in the Region.

Levels of labour exchange within the Region are very high, with almost three out of ten Richmond Valley workers and about one in four Ballina and Kyogle workers employed elsewhere. These high levels of labour exchange reflect significant economic integration across the five LGAs.

Occupational Profile for the Northern Rivers

Occupation	# Northern Rivers	% of the Labour Force	Location Quotient
Managers	8,054	13.5%	0.98
Labourers	7,593	12.7%	1.42
Machinery Operators & Drivers	3,217	5.4%	0.86
Technicians and Trades Workers	8,155	13.7%	1.06
Clerical & Admin Workers	6,867	11.5%	0.82
Community & Personal Service Workers	7,401	12.4%	1.17
Professionals	12,308	20.6%	0.86
Sales Workers	6,103	10.2%	1.09
TOTAL	59,698	100.0%	1.00

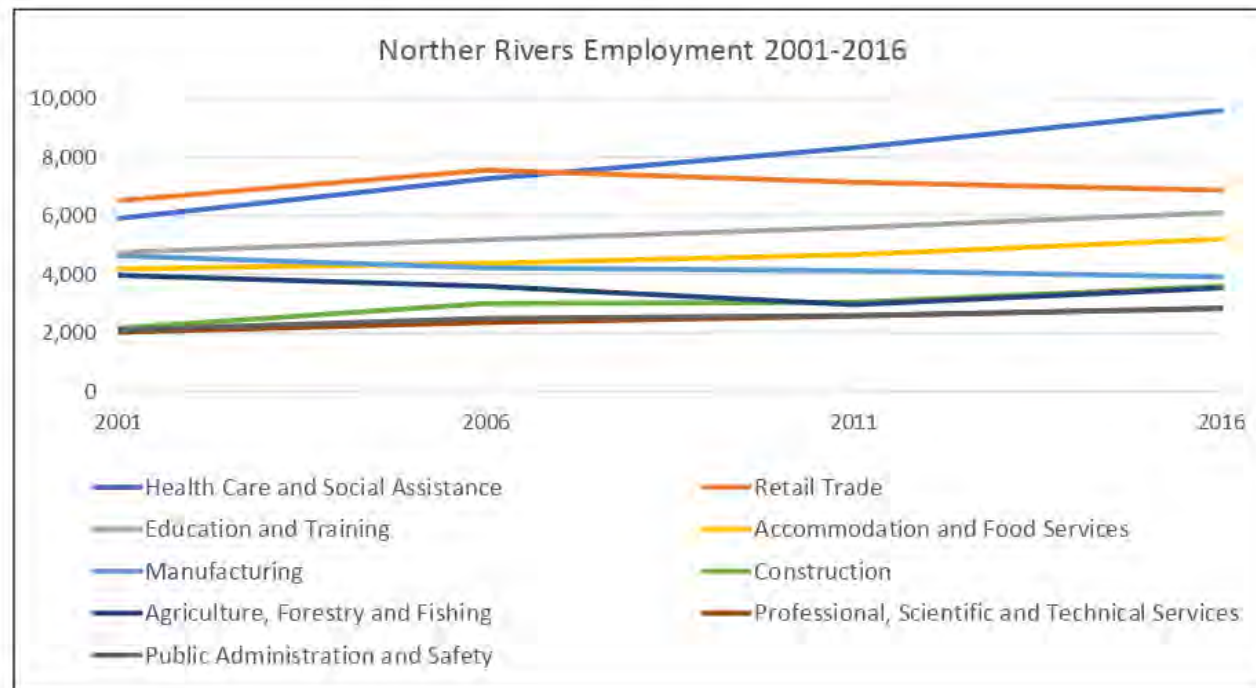
Labour Mobility within the Northern Rivers

Location	Works in the LGA they live in	Works elsewhere in the Region	Works in a neighbouring Region
Ballina	63.4%	27.6%	9.0%
Byron	70.6%	11.6%	17.8%
Kyogle	62.4%	25.9%	11.7%
Lismore	74.4%	18.4%	7.1%
Richmond Valley	63.0%	29.5%	7.5%
Northern Rivers	68.2%	21.4%	10.3%

Employment By Industry

The below graph shows changes in employment for all industries employing over 5 per cent of the workforce. Since 2001, the Northern Rivers has seen the strongest growth in employment in the Health Care and Social Assistance sector, followed by Professional, Scientific and Technical Services, Education and Training and Accommodation and Food Services.

Retail Trade and Agriculture, Forestry and Fishing were the only two industries that experienced negative growth during this period. This is consistent with broader industry trends, with Agriculture reducing employment numbers as they invest in labour saving capital and Retail Trade reducing employment numbers with the switch to online shopping.



Employment by Industry Data from 2001-2016

Industry Sector	Number employed				Change in Number Employed	Industry Size %	Employment Change % 2001-2016		
	2001	2006	2011	2016			2001-06	2006-11	2011-16
Health Care and Social Assistance	5,911	7,262	8,318	9,588	1,270	16.6%	22.9%	14.5%	15.3%
Retail Trade	6,510	7,565	7,146	6,881	-265	11.9%	16.2%	-5.5%	-3.7%
Education and Training	4,756	5,177	5,592	6,099	507	10.6%	8.9%	8.0%	9.1%
Accommodation and Food Services	4,180	4,384	4,683	5,205	522	9.0%	4.9%	6.8%	11.1%
Manufacturing	4,640	4,227	4,126	3,902	-224	6.8%	-8.9%	-2.4%	-5.4%
Construction	2,158	3,005	3,044	3,607	563	6.3%	39.2%	1.3%	18.5%
Agriculture, Forestry and Fishing	3,965	3,603	2,962	3,544	582	6.2%	-9.1%	-17.8%	19.6%
Professional, Scientific and Technical Services	2,023	2,356	2,584	2,853	269	5.0%	16.5%	9.7%	10.4%
Public Administration and Safety	2,110	2,504	2,604	2,836	232	4.9%	18.7%	4.0%	8.9%
Other Services	2,050	2,064	2,015	2,130	115	3.7%	0.7%	-2.4%	5.7%
Transport, Postal and Warehousing	1,568	1,573	1,620	1,788	168	3.1%	0.3%	3.0%	10.4%
Administrative and Support Services	1,215	1,089	1,297	1,694	397	2.9%	-10.4%	19.1%	30.6%
Wholesale Trade	2,415	1,924	1,677	1,132	-545	2.0%	-20.3%	-12.8%	-32.5%
Financial and Insurance Services	1,012	1,140	1,043	974	-69	1.7%	12.6%	-8.5%	-6.6%
Rental, Hiring and Real Estate Services	839	965	920	941	21	1.6%	15.0%	-4.7%	2.3%
Arts and Recreation Services	569	661	753	823	70	1.4%	16.2%	13.9%	9.3%
Information Media and Telecommunications	930	857	776	561	-215	1.0%	-7.8%	-9.5%	-27.7%
Electricity, Gas, Water and Waste Services	304	403	421	449	28	0.8%	32.6%	4.5%	6.7%
Mining	52	83	127	146	19	0.3%	59.6%	53.0%	15.0%

Note: there is only 19 sectors in ANZSIC Level 1

Unemployment Trends

Historically, unemployment rates in the Northern Rivers have been higher than the averages for both NSW and regional NSW.

However, in recent years unemployment rates in all locations in the Region have converged towards State and regional NSW averages across the Northern Rivers, so much so that:

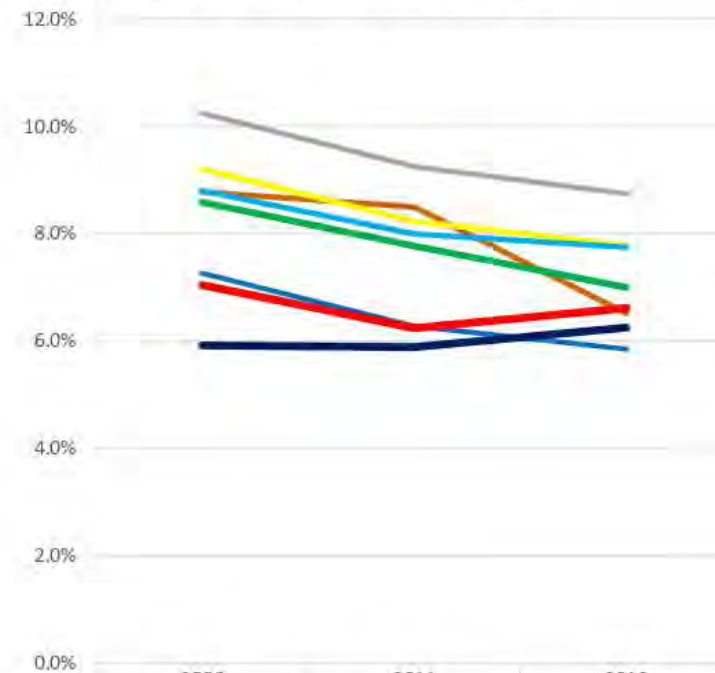
- Ballina now has unemployment below both the State and regional NSW average
- Byron's unemployment is below the regional NSW average.

Kyogle has had the highest unemployment rate in the Region over the 10 years to 2016. However, Kyogle's improvement is substantial over that period, such that:

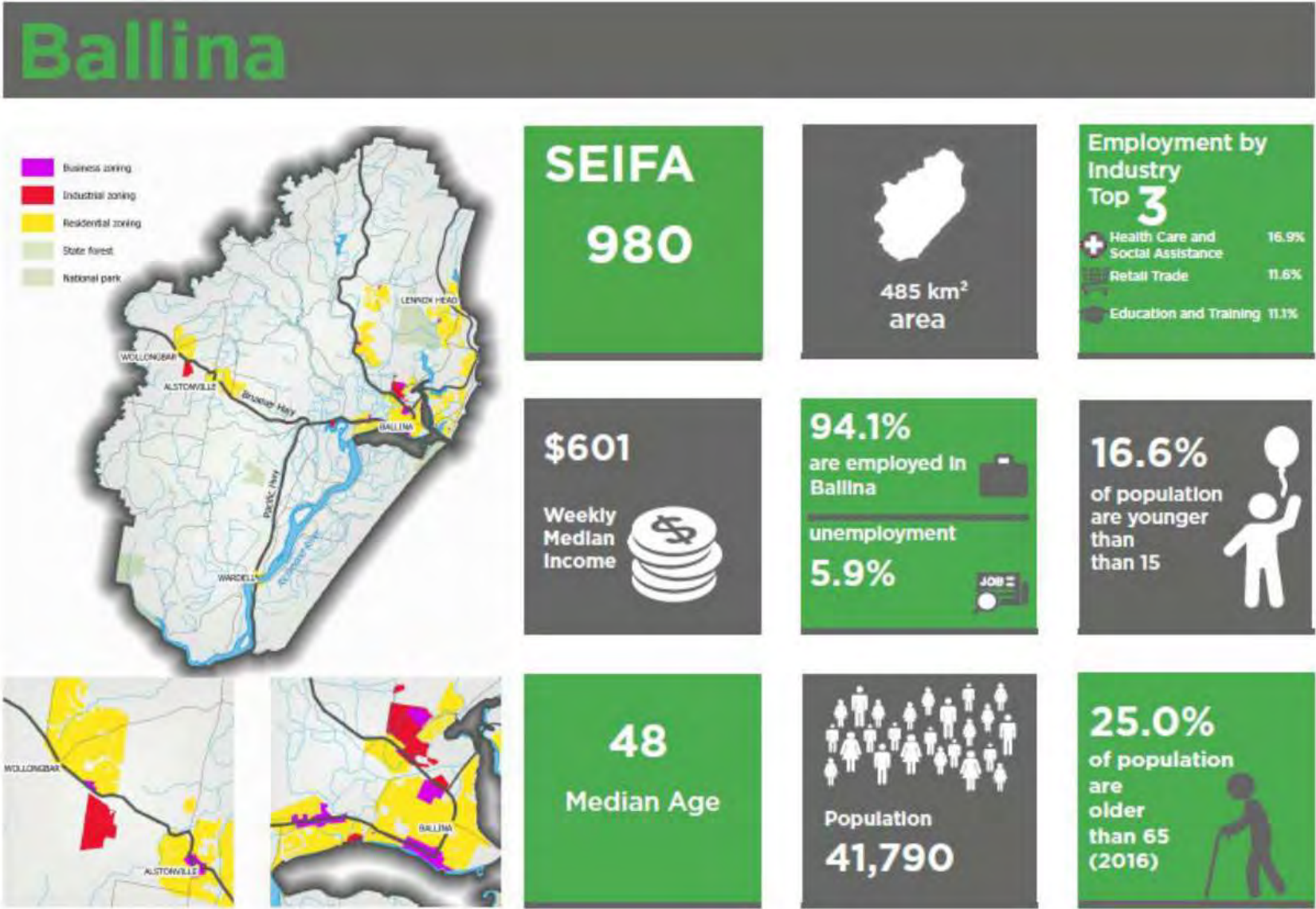
- Kyogle's unemployment rate was more than four percentage points above the NSW rate in 2006, but just over 2 percentage points above the State rate in 2016
- Kyogle's unemployment rate is less than 2 percentage points above the Northern Rivers rate in 2016.

Overall, the Northern Rivers unemployment rate was within half a percentage point of the regional NSW average and with one percentage point of the State average in 2016.

Northern Rivers Unemployment Rates, 2006 to 2016



	2006	2011	2016
Ballina Unemployment rate	7.3%	6.3%	5.9%
Byron Unemployment rate	8.8%	8.5%	6.5%
Kyogle Unemployment rate	10.2%	9.2%	8.7%
Lismore Unemployment rate	9.2%	8.2%	7.8%
Richmond Valley Unemployment rate	8.8%	8.0%	7.7%
Northern Rivers Unemployment rate	8.6%	7.8%	7.0%
REGIONAL NSW Unemployment rate	7.0%	6.2%	6.6%
NSW Unemployment rate	5.9%	5.9%	6.3%



Source: Australian Bureau of Statistics

Ballina Shire

Ballina Shire was formed in 1976 as an amalgamation between Tintenbar Shire and the Municipality of Ballina. Major towns in the Shire include Skennars Head, Alstonville, Ballina, Wollongbar and Lennox Head.

Ballina Shire is located on the Richmond River, approximately 180 km south of Brisbane and 740 km north of Sydney, in the east of the Northern Rivers.

Ballina's economic origins lie in forestry, with settlement on the Richmond River extending out of Clarence River settlements in the early 1840s. Other settlers moved to the area to support the cedar trade in the 1840s and 1850s.

Ballina Shire has a population of approximately 42,000 people, the second highest in the Region. About 28 per cent of the total Northern Rivers population resides in Ballina Shire.

In the 2016 Census, the median age of people in Ballina Shire was 48 years old with children aged 0 - 14 years making up 16.6 per cent of the population and 25 per cent over 65 years old.

Ballina today reflects diverse economic strengths, including tourism, produce (including fish and fruit and tree nuts), food manufacturing, professional, scientific and technical services and a range of human services, including education, health and residential care. Many Ballina residents commute to Lismore and Byron Bay to best balance their economic and lifestyle needs.

Unemployment rate

Ballina's unemployment rate of 5.9 per cent is lower than the national and state unemployment level of Australia - 6.9 per cent and NSW - 6.3 per cent respectively. It has the lowest unemployment rate in the Northern Rivers.

Source: 2016 Census, ^ABS September 2017

Median income

Ballina's personal median weekly income is \$601. This is lower than the NSW personal median weekly income of \$664, but is the highest in the Northern Rivers Region.

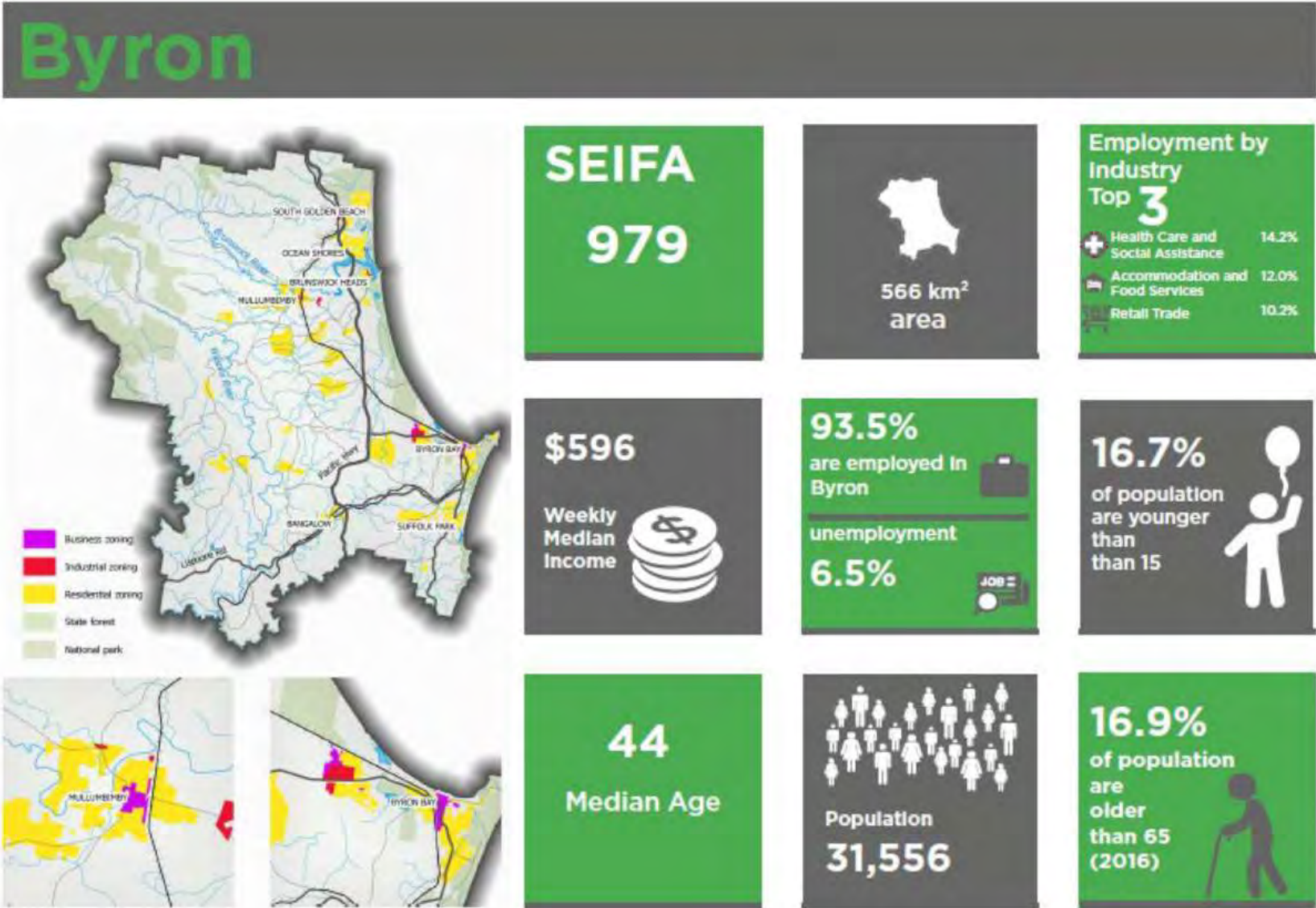
Source: ABS 2016 Census

Employment by industry

The three largest employment industries are:

- Health Care and Social Assistance - 16.9 per cent
- Retail Trade - 11.6 per cent
- Education and Training - 11.1 per cent





Source: Australian Bureau of Statistics

Byron Shire

Byron Shire was formed in 1906 and amalgamated with Mullumbimby in 1980, where administration of the council is now based. Major towns in the Shire include Byron Bay, Ocean Shores, Mullumbimby, Suffolk Park and Bangalow.

Byron Shire is 165 kilometres south of Brisbane, and 765 kilometres north of Sydney, in the east of the Northern Rivers.

Byron Shire's population of around 31,500 is the third largest in the Region. In the 2016 Census, the median age was 44 years old with children aged 0 - 14 years making up 16.7 per cent of the population and 16.9 per cent over 65 years old.

As remains the case today, Byron's origins lie in connection. The Aboriginal name for the area - Cavvanbah - means "meeting place". The Shire's economic foundations reflect demand for its commodities like cedar, gold and dairy for which rail and port links were quickly established.

Over time, people have increasingly come to physically connect themselves to Byron's environment and culture through tourism, as well as its burgeoning professional and business networks. Byron's economy today reflects diverse specialisations like tourism, clothing manufacturing, creative professionals (like advertising and motion picture activities), computer system design, construction services and arts and recreational services.

Unemployment rate

Byron Shire's unemployment rate of 6.5 per cent is between the national and state unemployment level of Australia 6.9 per cent and NSW - 6.3 per cent respectively.

Source: ABS 2016 Census

Median income

Byron's personal median weekly income is \$596. This is lower than NSW personal median weekly income of \$664.

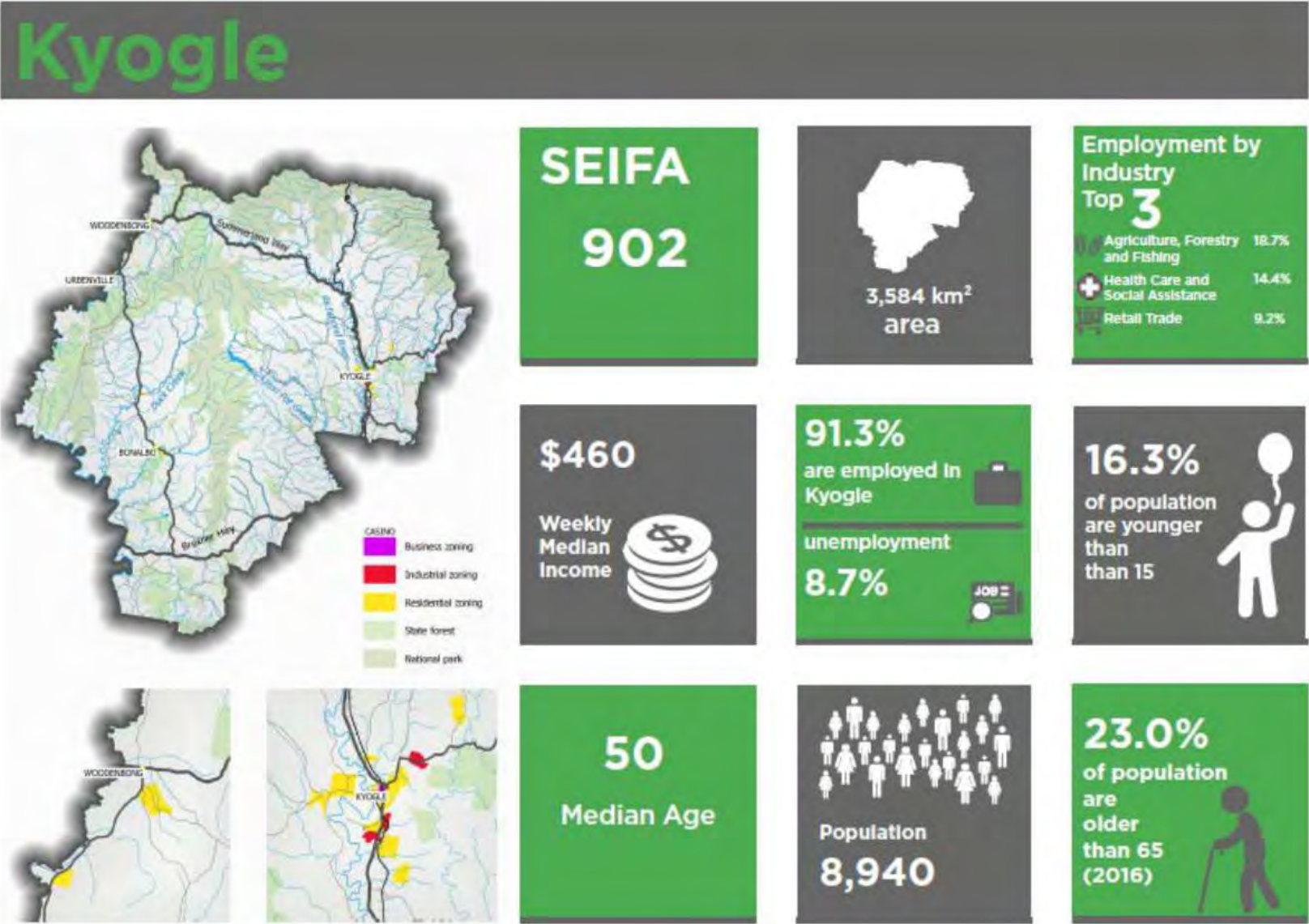
Source: ABS 2016 Census

Employment by industry

Three largest employment industries are:

- Health Care and Social Assistance - 14.2 per cent
- Accommodation and Food - 12 per cent
- Retail Trade - 11.6 per cent





Source: Australian Bureau of Statistics

Kyogle

Kyogle Council represents and services the centres of Kyogle, Bonalbo and Tabulam as well as smaller surrounding communities.

Kyogle is 165 kilometres south of Brisbane and 745 kilometres north of Sydney, in the north west of the Northern Rivers. The area adjoins the Queensland border and incorporates the World-Heritage listed Border Ranges National Park rainforest.

Kyogle's name comes from the Bundjalung word Kaiou gal, meaning 'the place of the plain turkey'. The area's economic origins lie in timber and dairy, reflective of the inherent productive potential of its natural environment.

Kyogle has the smallest population in the Northern Rivers at approximately 8,900 people. It is the largest LGA in the Region encompassing a total land area of 3,584 square kilometres.

As of the 2016 Census, the median age of people in Kyogle was 50 years old, the Region's highest.

Kyogle's economy today reflects its extensive, integrated specialisations in agriculture (like dairy and sheep, beef and grain farming), manufacturing (like meat and bakery products and leather goods) and logistics. The area also retains its historical base in forestry, logging and sawmilling.

Unemployment rate

Kyogle Council's unemployment rate of 8.7 per cent is higher than both the national and state unemployment levels of Australia 6.9 per cent and NSW – 6.3 per cent respectively.

Source: ABS 2016 Census

Median income

Kyogle Council's personal median weekly income is \$460, the lowest in the Region. This is significantly lower than the NSW personal median weekly income of \$664. Kyogle Council has the lowest median weekly income in the Northern Rivers.

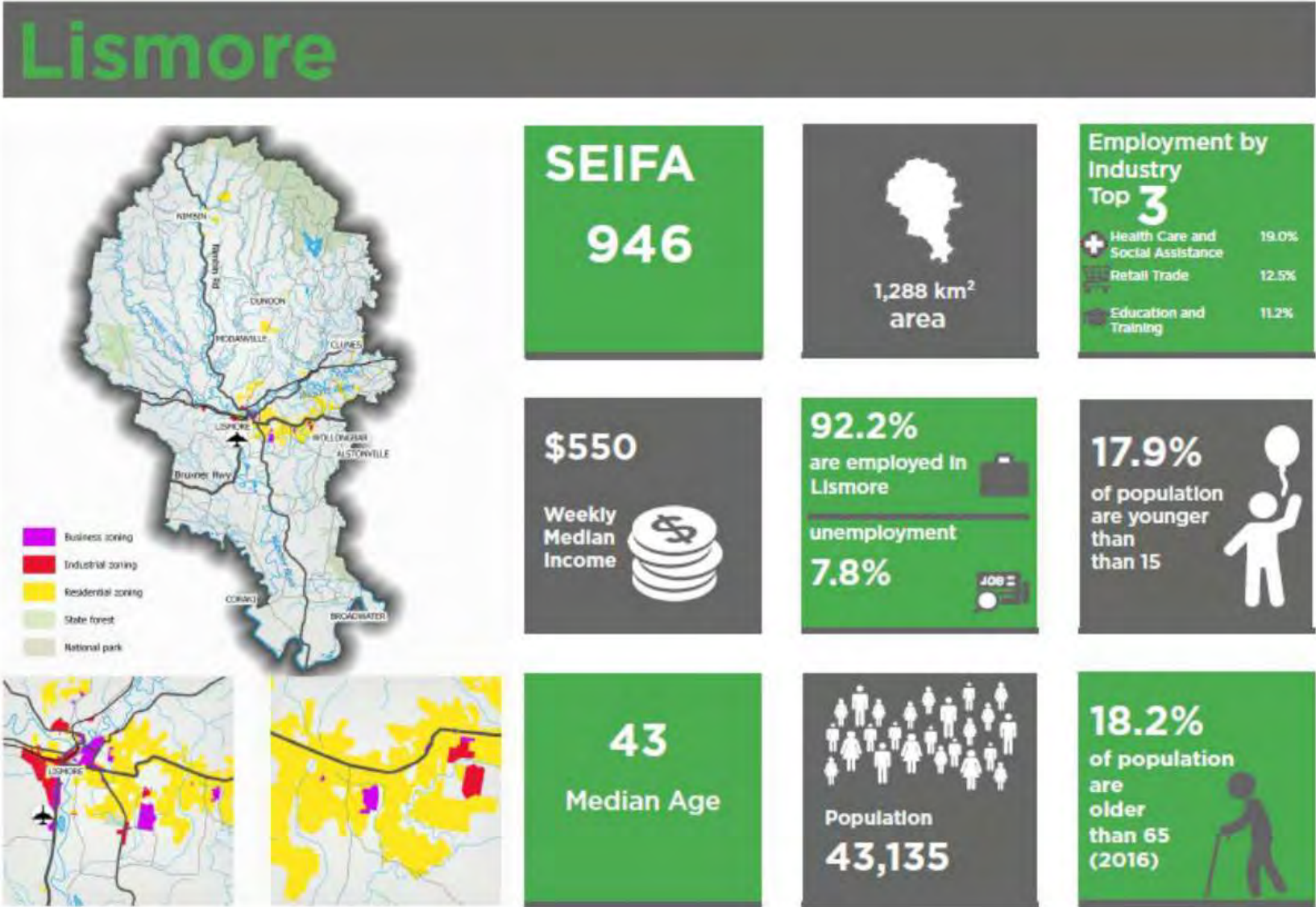
Source: ABS 2016 Census

Employment by industry

Three largest employment industries are:

- Agriculture – 18.7 per cent
- Health Care and Social Assistance – 14.4 per cent
- Retail Trade – 9.2 per cent





Source: Australian Bureau of Statistics

Lismore City

Lismore City, formed as a municipality in 1879 and officially gaining city status in 1946, consists of the regional city of Lismore and surrounding centres of Nimbin, Clunes and Wollongbar.

Lismore is approximately 200 km south of Brisbane and 730 km north of Sydney and represents the 'heart' of the Northern Rivers.

Lismore's origins lie in the history of the Wiyabal tribe within the Bundjalung Nation for whom it has been home longest. European settlement began with sheep and cattle grazing by squatters on Crown land, with the township proclaimed in 1856.

Lismore's population is the Northern Rivers' largest at over 43,000 people.

Lismore City serves as an administrative centre for the Northern Rivers, known for its economic diversity, natural environment and alternative lifestyle with a high proportion of creative industries and festivals.

Lismore's economy today reflects a diversity of specialisations in agriculture (like forestry and fruit and tree nuts), manufacturing (like dairy and other food products and fruit and vegetable processing) and population services (like education, health and other forms of social assistance).

Unemployment rate

Lismore City Council's unemployment rate of 8.2 per cent is higher than both the national and state unemployment levels of Australia 6.9 per cent and NSW – 6.3 per cent respectively.

Source: ABS 2016 Census

Median Income

Lismore's personal median weekly income is \$550. This is lower than NSW personal median weekly income of \$664.

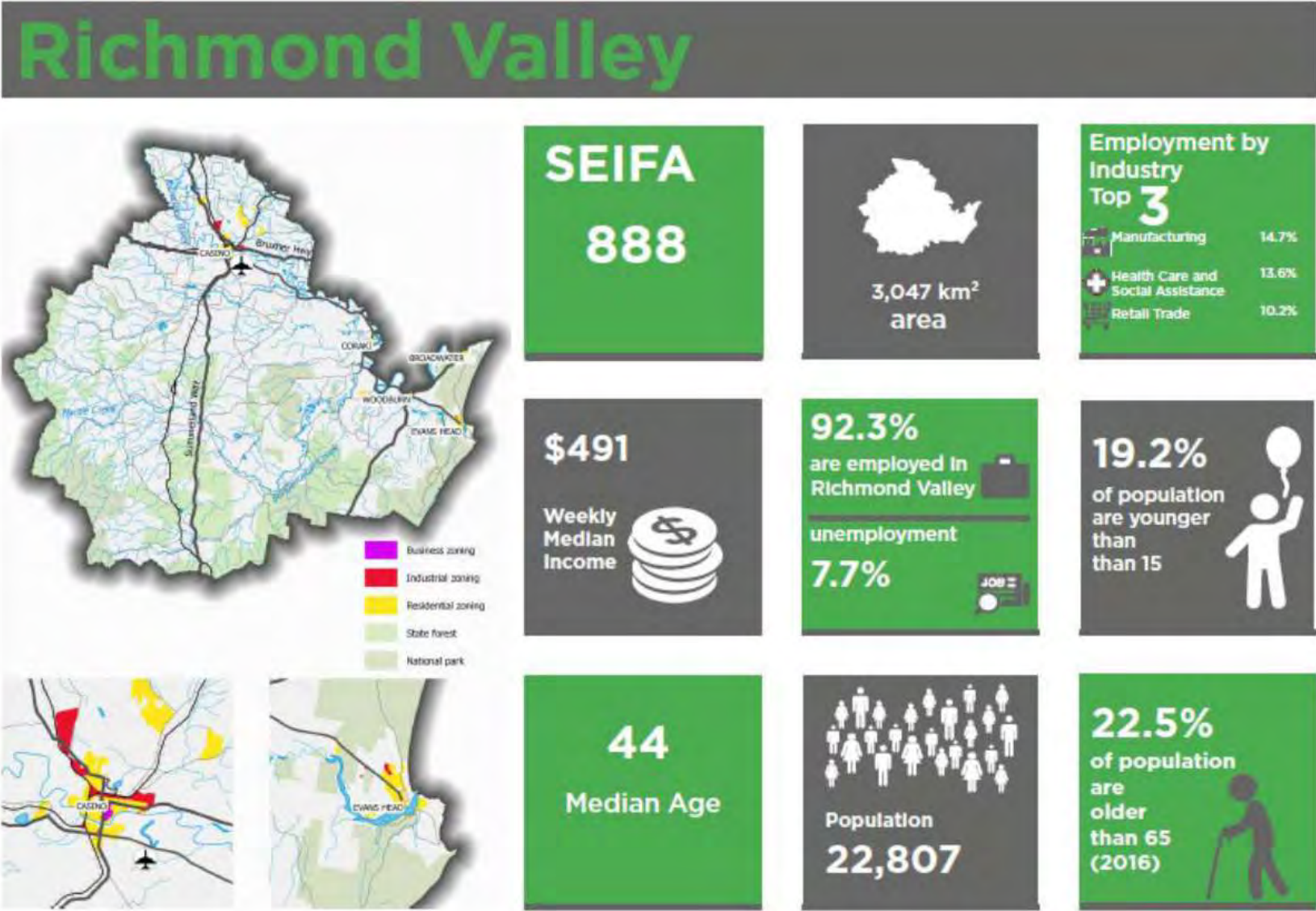
Source: ABS 2016 Census

Employment by industry

Three largest employment industries are:

- Health Care and Social Assistance – 19 per cent
- Retail Trade – 12.5 per cent
- Education and Training – 11.2 per cent





Richmond Valley

Richmond Valley Council was formed in 2000 from the amalgamation of the Municipality of Casino and the Richmond River Shire Council. Richmond Valley Council includes the centres of Casino, Coraki, Evans Head and Woodburn.

Richmond Valley encompasses a total area of 3,047 square kilometres, 200 kilometres south of Brisbane and 715 kilometres north of Sydney, in the south west of the Northern Rivers.

The Richmond Valley is a key part of the origins of the Bundjalung Nation, reflected in the story of the Three Brothers, Mamoonth, Yarbiri and Birrung, and their families.

Richmond Valley's economic origins lie in the pastoral settlement of the 1840s and the beginnings of Casino in the 1880s.

Richmond Valley has a total population of approximately 22,800 people, of which 10,600 reside in its biggest town, Casino.

Richmond Valley's economy today reflects its specialisations in agriculture and forestry (like poultry and sugar cane), manufacturing (including beef and other meats, sugar, leather and wood products), food and beverage wholesaling, logistics, pre-schooling and specialised retailing.

Unemployment rate

Richmond Valley's unemployment rate of 7.7 per cent is higher than both the national and state unemployment levels of Australia 6.9 per cent and NSW – 6.3 per cent respectively.

Source: ABS 2016 Census

Median Income

Richmond Valley's personal median weekly income is \$491. This is significantly lower than NSW personal median weekly income of \$664.

Source: ABS 2016 Census

Employment by industry

Three largest employment industries are:

- Manufacturing – 14.7 per cent
- Health care and Social Assistance – 13.6 per cent
- Retail Trade – 10.2 per cent



Business Composition Profile

Analysis of business profiles compared to representative industry structures for the State as a whole reveals a number of features.

In considering the business profile, overall Northern Rivers is overrepresented for firms in Agriculture, Tourism, Education, Manufacturing and Retail. Excepting Education, these sectors are among those with the largest numbers of firms in them, along with Construction, Professional Services, Transport and Financial services.

At the industry level, the Region's profile reflects a number of significant features, including:

- overrepresentation of non-employing and smaller revenue businesses
- overrepresentation of large scale employment businesses in Tourism and Agriculture, which are uncommon in regional NSW
- a 'bulge' in mid-sized retail businesses.

Business Staffing Location Quotients in the Northern Rivers, Select Industries

Industry	Non employing	1-19 staff	20-199 staff	+200 staff
Accommodation and Food Services	1.03	0.97	1.13	1.08
Agriculture, Forestry and Fishing	1.19	0.54	0.56	2.69
Construction	1.18	0.79	0.75	0.00
Manufacturing	1.12	0.93	0.75	0.00
Retail Trade	0.97	1.04	0.99	0.00
All industries	1.10	0.87	0.78	0.31

Business Revenue Location Quotients in the Northern Rivers, Select Industries

Industry	0 - \$2M	\$2M - \$10M	+\$10M
Accommodation and Food Services	1.00	1.08	0.25
Agriculture, Forestry and Fishing	1.03	0.60	0.48
Construction	1.02	0.95	0.27
Manufacturing	1.06	1.05	0.48
Retail Trade	1.02	1.33	0.53
All industries	1.03	0.90	0.31

Shift-Share Analysis

Shift-share Analysis is a widely used technique to analyse regional economies where there is a specific interest in the growth or decline in a particularly macroeconomic variable; most often employment. The interest in shift share analysis arises from its ability to partition employment change in a given region into three distinct components.

1. Changes in regional employment resulting from changes in the State economy. That is, employment will increase or decrease as a result of broader economic conditions. This component is called the **State Shift**.
2. Changes in regional employment that are a result of broader industry specific trends. This component is called the **Industry Mix Shift**.
3. Finally, changes in employment which results from unique regional factors that are not related to broader economic and industry factors. This component is called the **Regional Shift**.

The total employment change in the Region is called the **Total Shift**.

Shift Share Analysis is concerned with the 'share' that each of these 'shifts' hold in the total change in employment (the Total Shift). This relationship is also described by the following expression.

$$\text{Total Shift} = \text{State Shift} + \text{Industry Mix Shift} + \text{Regional Shift}$$

The Regional Shift component is the residual change for the Region, after accounting for State Shift and Industry Mix Shift. It can help identify industries where a region has a comparative advantage over the broader economy that is attributed to local competitiveness or characteristics unique to the Region.

The table shows the shift in employment growth for all ANZSIC level 1 industries, each employing more than 5% of the Region's workforce.

Regional Shift between 2011-2016 in the Northern Rivers, Select Industries

Industry	Employed persons (2011)	State shift	Industry Mix Shift	Regional Shift	Total change in jobs by 2016
Retail Trade	28,216	3,019	-2,455	2,567	3,131
Health Care and Social Assistance	26,636	2,850	1,888	4,262	9,001
Accommodation and Food Services	22,376	2,395	1,137	2,081	5,612
Education and Training	17,302	1,852	618	3,222	5,691
Manufacturing	17,003	1,820	-5,891	2,867	-1,204
Construction	16,446	1,760	2,609	3,406	7,775
Professional, Scientific and Technical Services	12,936	1,384	199	991	2,574

It is notable that all of the major employing industries listed in the table above saw substantial Regional Shift increases in the five years to 2016. All seven industries saw Regional Shift increases of around 1,000 jobs or more. This implies local factors are driving changes in these specialised industries to a significant degree.

Of particular note are the Regional Shifts of around 2,500 to 3,000 jobs over a 5 year period in Retail Trade and Manufacturing. These changes occurred against a broader backdrop of substantial jobs contraction in these sectors, implying dynamic effects in the Region may be offsetting broader risks attributable to widespread economic and technological changes.

Gross Value Add Analysis

The Centre for Economic and Regional Development (CERD) has produced an Input Output table for the Northern Rivers regional economy based on the ABS Input Output (IO) Tables for New South Wales. The CERD analysis shows the Region is a net importer, with exports out of the Region estimated at \$1,949 million and imports into the Region estimated at \$2,438 million.

Exports - The Northern Rivers' leading export industries are Manufacturing, Agriculture, Forestry & Fishing and Accommodation & Food Services (Tourism).

Imports - Construction and Manufacturing are the leading industry sources of demand for imports for production processes.

Gross Regional Product (GRP) = Total GRP (\$m) It is the sum of value added across all industries for the economy plus that derived from Ownership of Dwellings and Final Demand. Total industry value added is therefore a subset of Gross Regional Product.

Gross Value Add (GVA): Measures the value of goods and services produced in a region. It is a combination of wages (CoE) and Operating Surplus (Cos).

Final demand contribution to imports is related to imports purchased to satisfy Household & Government Final Consumption Expenditure and Gross Fixed Capital Formation.

Primary inputs contribution to exports relates to the proportion of imports re-exported.

Ownership of Dwellings: Ownership of Dwellings is not an ANZSIC industry classification. It relates to the imputation of rent to owner-occupiers and their associated expenses and does not have any associated direct employment or household income

Reference: Centre for Economic and Regional Development (CERD) 2015-16 Input Output table, generated using the GRIT method and IO9 software.

	Gross Value Add (GVA) \$m	GVA as % of Industry Total	% of Total Region Exports	Total Region Exports (\$m)	% of Total Region Imports	Total Region Imports (\$m)
Health Care and Social Assistance	713.1	12.6%	0.7%	12.70	3.5%	84.2
Education and Training	566.7	10.0%	6.8%	133.42	2.1%	51.0
Financial and Insurance Services	432.9	7.6%	2.1%	41.24	1.7%	41.8
Retail Trade	431.2	7.6%	3.5%	67.65	2.2%	54.2
Construction	407.6	7.2%	0.6%	11.14	10.5%	257.1
Manufacturing	396.1	7.0%	30.0%	584.93	11.6%	282.6
Agriculture, Forestry and Fishing	363.1	6.4%	10.9%	212.37	4.2%	102.4
Public Administration and Safety	338.8	6.0%	0.2%	3.89	2.1%	50.0
Accommodation and Food Services	323.5	5.7%	10.1%	197.62	2.9%	70.8
Professional, Scientific and Technical Services	309.2	5.4%	4.3%	83.52	3.0%	72.8
Rental, Hiring and Real Estate Services	279.2	4.9%	0.9%	17.31	1.7%	42.2
Wholesale Trade	205.9	3.6%	6.9%	135.46	2.8%	69.0
Transport, Postal and Warehousing	191.4	3.4%	7.3%	141.60	2.9%	70.7
Information Media and Telecommunications	172.4	3.0%	2.0%	38.36	1.6%	40.1
Other Services	166.7	2.9%	0.3%	4.98	2.7%	66.7
Administrative and Support Services	152.4	2.7%	1.0%	19.44	1.4%	34.4
Electricity, Gas, Water and Waste Services	140.5	2.5%	0.2%	3.17	1.6%	38.6
Arts and Recreation Services	53.3	0.9%	0.6%	11.26	0.8%	19.7
Mining	32.0	0.6%	1.5%	28.93	0.5%	11.7
Ownership of Dwellings	847.3	14.9%	1.4%	27.76	0.6%	14.2
Total Industry GVA	5676.1	100.0%	89.7%		59.9%	
Final Demand	532.7				39.5%	963.7
Primary inputs			8.9%	172.52		
Total	6208.8		98.6%		99.4%	
Total value (\$m)	7056.1	5676.1	1949.285	1,949.29	2,437.87	2437.9
Total GRP (\$m)	7056.1					

Tourism

The NSW Government's Centre for Economic and Regional Development (CERD) has undertaken analysis to shed light on how tourism activity impacts the sectors of the Region's economy.

CERD's analysis accounts for both the direct and flow-on (or multiplier) impacts associated with the expenditure of visitors. CERD's estimates are based entirely on secondary data used to construct the IO table and estimate visitor expenditure.

The CERD analysis suggests that the sectors most closely associated with tourism activity are:

- Accommodation and Food Services
- Retail Trade
- Arts and Recreational Services
- Rental, Hiring and Real Estate Services
- Administrative & Support Services.

CERD's analysis concludes that the total impact of tourism expenditure on the Northern Rivers economy can be summarised as:

- 12.0 per cent of total wages
- 14.2 per cent of total employment
- 12.4 per cent of total output.

Further contextual information on the sources and structure of Tourism in the Region can be found in Tourism Research Australia LGA data overleaf.

Tourism Contributions to Wages, Employment and Output by Industry in the Northern Rivers

Industry	Wages	FTE	Value Added
Agriculture, Forestry and Fishing	7.9%	7.7%	7.9%
Mining	2.1%	2.6%	2.0%
Manufacturing	6.5%	6.8%	6.6%
Electricity, Gas, Water and Waste Services	10.9%	10.7%	11.0%
Construction	2.1%	2.6%	2.1%
Wholesale Trade	6.0%	6.0%	6.0%
Retail Trade	28.7%	28.7%	28.7%
Accommodation and Food Services	65.1%	61.9%	67.6%
Transport, Postal and Warehousing	13.6%	12.2%	14.6%
Information Media and Telecommunications	9.2%	9.1%	9.7%
Financial and Insurance Services	10.2%	10.1%	10.0%
Rental, Hiring and Real Estate Services	14.2%	14.9%	15.0%
Professional, Scientific and Technical Services	7.2%	7.5%	7.3%
Administrative and Support Services	14.2%	16.6%	14.3%
Public Administration and Safety	1.8%	1.9%	1.8%
Education and Training	5.2%	5.1%	5.2%
Health Care and Social Assistance	4.6%	4.6%	4.6%
Arts and Recreation Services	30.8%	30.0%	29.8%
Other Services	10.4%	11.6%	10.5%
Ownership of Dwellings	NA	NA	12.1%

Source: Centre for Economic and Regional Development

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Tourism

Tourism Research Australia 2016 LGA profiles show that Northern Rivers* has 2,445 tourism business, and attracts around 2.4 million overnight visitors per year that spend \$1.01 billion in the Region.

Byron Bay is the most popular tourist destination, followed by Ballina and Richmond Valley. The Region is the most popular tourist destination on the NSW North Coast, with the Gold coast (QLD) being the larger competitor.

Tourism Research Australia 2016 LGA Profiles

	Overnight ('000)	Tourism businesses	Spend (\$m)
Byron Bay	886	849	581
Ballina	640	550	240
Lismore	627	491	126
Richmond Valley	292	182	67
Kyogle	NA	NA	NA
Northern Rivers	2,445	2,072	1,014
Tweed Shire	572	980	360
Gold Coast	4,138	8,372	4,604
Clarence	496	567	270
Coffs Harbour	833	831	525

* There is no TRA profile for Kyogle LGA

Source: Tourism Research Australia Local Government Area Profiles 2016

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Appendix B – Regional Endowments & Specialisations

Regional Endowments

Endowments are key features of the natural environment, geography and society in a region or location.

Economic principles suggest that endowments are a region's key sources of sustainable economic advantage, and so should be points of emphasis for regional development policy.

The Centre for Economic and Regional Development in its Regional Economic Enablers Report (2016) found that:

“the future of individual regional economies is inexorably linked to their natural endowments, and attempts to retain or establish industries without an underpinning endowment are unlikely to succeed”.

Sources of endowment potentially include:

- Geography
- The built environment and physical capital
- Human capital
- Institutional and organisational linkages (social capital).

Physical endowments include agricultural land, climate, mineral and water resources, aesthetic appeal and location relative to major trade routes.

Built and institutional endowments include hospitals and educational facilities, which may be the result of government decisions. Human endowments include abundant labour, specialist skills and entrepreneurship.

The Northern Rivers' Principal Endowments

Physical or geographic endowments

Riverine and hinterland amenity – the amenity of the Richmond and Wilson Rivers and hinterland areas are a prime source of appeal attracting visitors and potential residents to the Region.

Coastal amenity – Byron Bay, Ballina and surrounds showcase the coastal offerings the Northern Rivers are famous for.

Proximity to South East Queensland – the Northern Rivers can easily access the growing markets and opportunities over the border in South East Queensland. About 3.5 million people call South East Queensland home today, projected to rise to 5.3 million over the next 25 years.

Arable land – soils and climate provide the Region with distinct advantages in producing high value agricultural products.

Built endowments

Ballina Airport – Ballina Airport provides an enviable level of air service among regional centres, with plentiful connections to major metropolitan markets.

Gold Coast Airport and Precinct – While beyond the boundaries of the Region itself, an international standard airport an hour or so up the Pacific Highway offers the Northern Rivers further connections to major metropolitan markets as well as into Asia.

Pacific Highway – the Pacific Highway serves as the Northern Rivers' principal source of connectivity to major metropolitan markets and gateways.

Lismore Base Hospital – the Level 5 Hospital provides the major referral hospital for the Region, incorporating allied health services.

North Coast Rail Line – the North Coast Railway is the Region's only rail link offering freight and passenger movements to domestic markets.

Summerland Way – the Summerland Way is the key source of north-south linkage in the Western end of the Region, essential to integrating Kyogle LGA with the rest of the Region. Summerland Way also provides an alternative connection to the Pacific Highway for connecting to other regions and markets.

Bruxner Highway – The Bruxner Highway provides the key source of east-west connectivity within the Region and access to and from markets further inland.

Private capital equipment – a range of private investments across different sectors including Agriculture, Accommodation, Tourism and Manufacturing support considerable productivity within the Region.

The Northern Rivers' Principal Endowments

Human endowments

Diverse specialised skill sets – the Northern Rivers offer a diverse range of regional specialisations.

Summary endowments are:

- Creatives, professionals and tourism-focused workers in coastal areas
- Agriculture, Manufacturing and Logistics chain workers in the western hinterland
- Health, Human Services and Retail in the regional hub, Lismore.

Specific endowments span:

- Engines of Growth like:
 - Accommodation
 - Meat and Meat Product Manufacturing
 - Fruit and Tree Nut Growing
 - Road Freight Transport
 - Dairy Cattle Farming and Dairy Product Manufacturing
 - Log Sawmilling, Timber Dressing, Forestry and Logging
 - Other Crop Growing and Sugar and Confectionery Manufacturing
 - Clothing and Footwear Manufacturing

- Enabling Industries like:

- Real Estate, Architectural, Engineering and Technical Services
- Management and Related Consulting Services
- Travel Agency and Tour Arrangement Services
- Motion Picture and Video Activities and Computer System Design

- Population Serving Industries like:

- School and Tertiary Education
- Hospitals and Allied Health, Pathology and Diagnostic Imaging Services
- Residential Care Services
- Specialised Retailing
- Creative and Performing Arts Activities.

The Northern Rivers' Principal Endowments

Institutional endowments

Local Councils – the local councils organise themselves effectively and advocate for their communities well.

Northern Rivers Joint Organisation of Councils (NQJO) – provides the Northern Rivers with a key institutional linkage between councils.

Clean, Green, Organic Branding – the Region's Clean, Green, Organic Branding – reflecting the quality and allure of the natural environment as well as its produce – is a key source of ongoing strength for activities like agriculture, food and ecotourism.

Industry co-operatives and organisations – the business communities of the Northern Rivers are marked by particularly strong co-operatives and organisations. The strength and quality of advocacy within the Region is notable, especially through a "co-op of co-ops", the Cooperatives Alliance.

Southern Cross University – the university is a key attractor of activity to the Region and advocate of its merits and potential to outsiders.

Sourdough Group – Sourdough is a not for profit initiative that aims to build strong businesses in the Region that generate prosperity and jobs. The Sourdough approach is to generate prosperity and jobs by helping existing businesses to be more sustainable, overcome challenges and grow and helping entrepreneurs create new businesses that put their innovative ideas into action.

State Government Agencies – State agencies play a number of key roles in the Region: as employers; as providers of key services; as leaders and facilitators; as landholders of land that may merit re-purposing; and as regulators of private sector activities.

Balance of Lifestyle, Social, Environmental and Economic Opportunities – the Northern Rivers offers, and is known for, its unique mix of lifestyle and economic opportunities.

The Region's mix makes it an appealing place to easily live, work and play in any of coastal, riverine or hinterland settings. Further, the quality of access to major markets allows residents very broad choices in combining lifestyle with work commitments.

Regional Development Australia Northern Rivers – RDA Northern Rivers serves as a very effective economic development strategist and facilitator of economic development. The RDA's linkages to councils, businesses and industry co-operatives and organisations across the Northern Rivers are enhanced through its role as the Secretariat of Northern rivers Joint Organisation of Councils.

Cultural & Indigenous Heritage – the Northern Rivers has rich sources of mythology and cultural heritage. This includes the Richmond Valley, home to the origins of the Bundjalung Nation, reflected in the story of the Three Brothers, Mamoonth, Yarbiri and Birrung, and their families.

Regional Specialisations

This section analyses sources of particular local advantage for focus in developing priority economic development actions for the Northern Rivers.

The charts on the following pages are indicative of the Northern Rivers' regional and locational strengths. The data underlying the charts reflects the relative concentrations of employment across different industries in the Northern Rivers and each of its LGAs at different points in time.

The concentrations are expressed as ratios (otherwise referred to as location quotients) relative to the proportionate industry employment concentrations for regional NSW as a whole.

A ratio greater than one means an industry is overrepresented in the Region in terms of the concentration of workers compared to the average proportions for regional NSW. For example, a ratio of 1.5 means the Region's share of employment in that industry is 50 per cent greater than would be representative for regional NSW. Ratios greater than 1 are taken as suggestive of a relative regional strength.

Alternatively, a ratio of less than one means an industry is underrepresented for employment in that industry compared to the average concentration for regional NSW economies.

In reviewing data, readers should keep in mind:

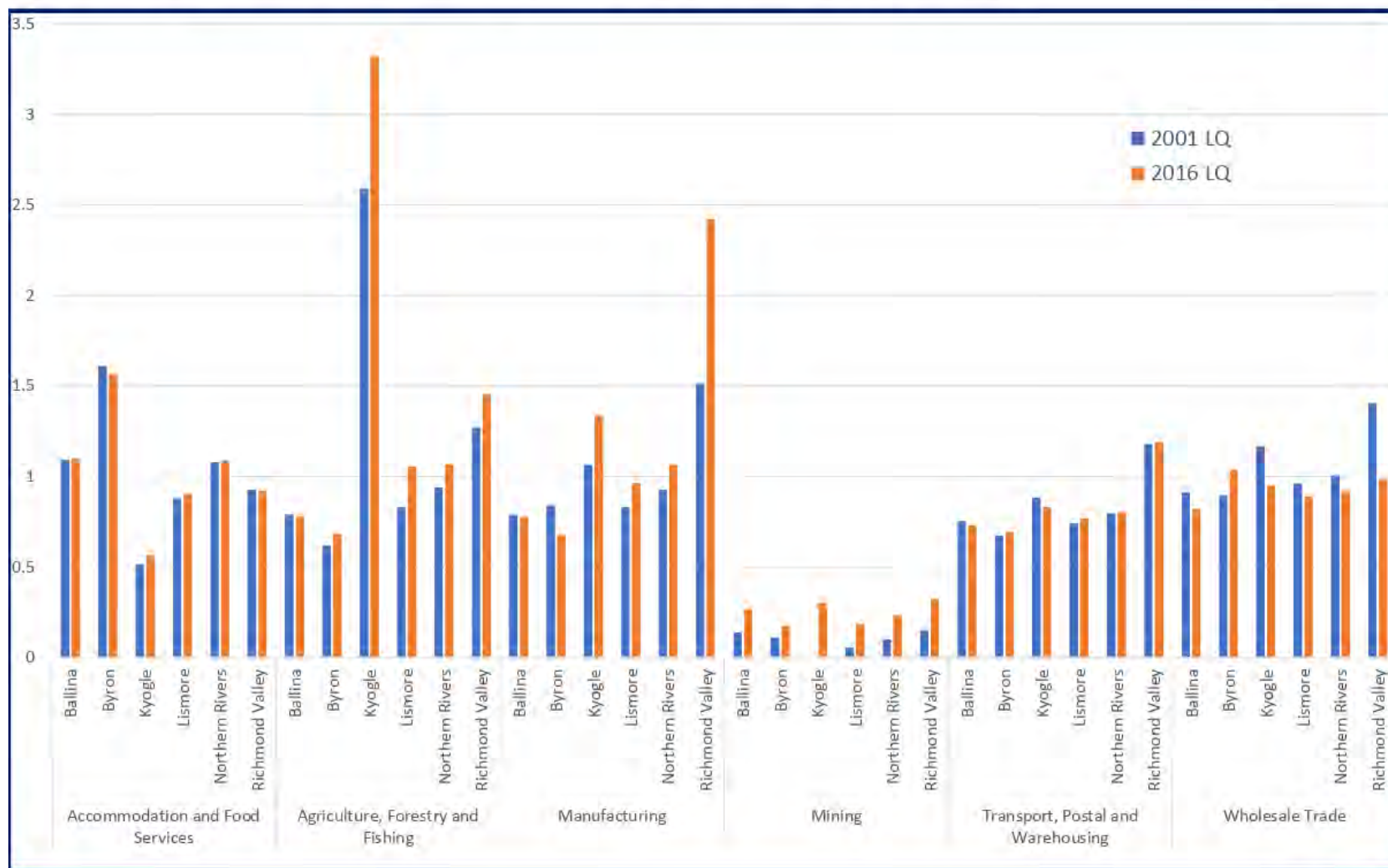
- by definition, not all industries in a region can have ratios of greater than one. A high concentration in one sector must come at the cost of lower concentrations in other sectors, bearing out the *relative* composition and advantages of the region's employment base.
- the charts reflect changes in concentration between 2001 to 2016. Changes in ratios reflect shifts in relative concentration, potentially attributable to either the Northern Rivers (numerator), or change in regional NSW (denominator), or both. Marked structural adjustments in the period were driven by extended drought, the rise of Asian economies, the mining investment and production booms and an exceptionally high exchange rate.
- the data suggests sources of advantage and specialisation both for the Region as a whole and the localities in it. The data suggests the Region functions well as an integrated economic grouping.

Industries have also been grouped together to allow comparison among and between those most closely linked to external markets and opportunities (Engines of Growth), those typically providing key support services to business (Enabling Industries) and those focused on providing services to the people, households and communities of the Northern Rivers (Population Serving Industries).

Review of data for these groupings can help identify common endowments and key linkages across the Region.

Taken together, endowments and specialisations are the principal guide to the foundations for review in considering priority needs, gaps, opportunities and risks addressed in subsequent sections of this Strategy.

'Engines of Growth' Industries - Location Quotients 2001 - 2016



'Engines of Growth' Industries – Regional Specialisations Analysis

Engines of Growth are key drivers typically reflecting regions' original reasons for being. They often offer the best prospects for growth, as they reflect both distinctive capabilities already in place, linked to external markets and opportunities.

Accommodation and Food Services, Agriculture, Forestry and Fishing and Manufacturing are the Northern Rivers' key engines of growth.

For the Region as a whole, none of the engines of growth industries reflect a pronounced specialisation. Each of the key engines listed above reflect a ratio of only 1.1 (and rounded up to that level in each case).

Modest ratios for the Region are themselves reflective of a diversified region. In reviewing industry ratios for each locality, the collective strengths of the Region are apparent. These include:

- Byron's specialisation in Accommodation and Food Services (ratio 1.5)
- Kyogle's specialisations in Agriculture, Forestry and Fishing (ratio 3.3) and Manufacturing (ratio 1.3)

- Richmond Valley's specialisations in Manufacturing (ratio 2.4), Agriculture, Forestry and Fishing (ratio 1.5) and Transport, Postal and Warehousing (ratio 1.2).

Key sub-industry strengths

At the sub-industry level, many groupings reflect concentrations well above the typical regional NSW shares.

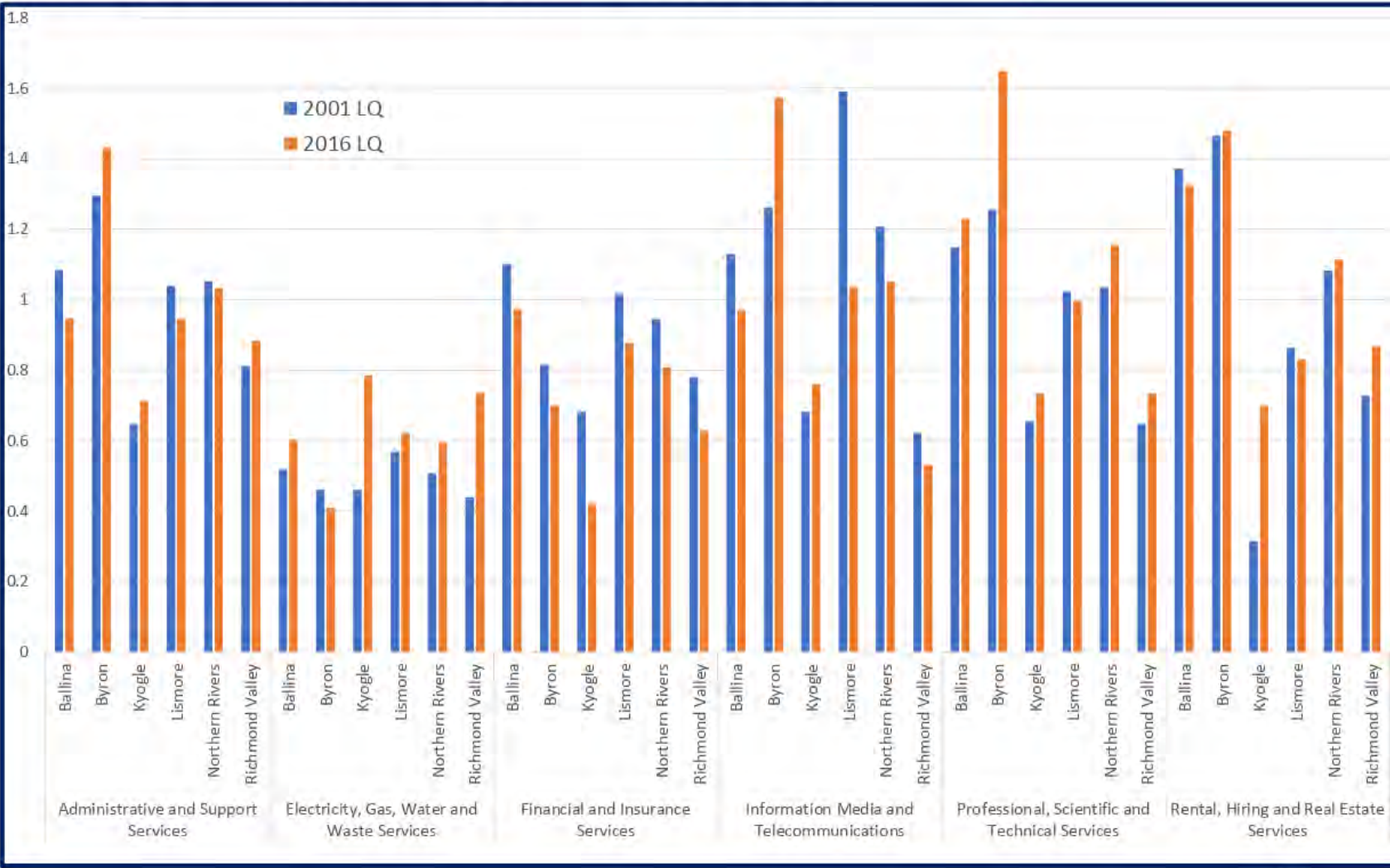
Taking the scale of employment into account, the most significant sub-industry specialisations and ratios include:

1. **Cafes, Restaurants and Takeaway Food Services (ratio 1.1, 2,730 workers).** This specialisation is most pronounced in Byron (ratio 1.3)
2. **Accommodation (ratio 1.2, 1,150 workers).** This specialisation is most pronounced in Byron (2.6) and Ballina (1.3)
3. **Meat and Meat Product Manufacturing (ratio 2.0, 960 workers).** This specialisation is most pronounced in Richmond Valley (ratio 10.3) and Kyogle (ratio 3.1), who together account for 750 workers
4. **Sheep, Beef Cattle and Grain Farming (ratio 0.6, 980 workers).** While not a regional specialisation, it is a strength of Kyogle (ratio 3.7, 340 workers)
5. **Fruit and Tree Nut Growing (ratio 3.5, 860 workers).** This specialisation is most pronounced in Lismore (ratio 5.0) and Ballina (ratio 4.0)
6. **Road Freight Transport (ratio 0.8, 640 workers).** While not a regional specialisation, this is a strength of Richmond Valley (ratio 1.5, 170 workers)
7. **Pubs, Taverns and Bars (ratio 1.2, 540 workers).** This specialisation is most pronounced in Byron (ratio 1.4) and Richmond Valley (ratio 1.3)
8. **Road Passenger Transport (ratio 1.1, 430 workers).** This specialisation is most pronounced in Richmond Valley (ratio 1.4) and Kyogle (ratio 1.4)
9. **Bakery Product Manufacturing (ratio 1.4, 390 workers).** This specialisation is most pronounced in Kyogle (2.3) and Ballina (1.6)
10. **Grocery, Liquor and Tobacco Product Wholesaling (ratio 1.5, 300 workers).** This specialisation is most pronounced in Byron (ratio 2.0) and Richmond Valley (ratio 1.8)

'Engines of Growth' Industries – Regional Specialisations Analysis

11. **Dairy Product Manufacturing (ratio 3.1, 290 workers).** This specialisation is most pronounced in Lismore (ratio 6.5) and Richmond Valley (ratio 5.3); and **Dairy Cattle Farming (ratio 1.6, 230 workers).** This specialisation is most pronounced in Kyogle (ratio 10.5) and Richmond Valley (ratio 3.2)
12. **Nursery and Floriculture Production (ratio 3.1, 280 workers).** This specialisation is most pronounced in Kyogle (ratio 4.6), Ballina (3.8) and Byron (ratio 3.5)
13. **Log Sawmilling and Timber Dressing (ratio 1.8, 190 workers) and Forestry and Logging (ratio 1.4, 90 workers).** These specialisations are specific to Richmond Valley (ratios 5.6 and 4.0) and Kyogle (ratios 11.6 and 4.6)
14. **Other Crop Growing (ratio 2.6, 180 workers) and Sugar and Confectionery Manufacturing (ratio 3.1, 110 workers).** These specialisations are most pronounced in Richmond Valley (ratios 5.0 and 7.8) and Ballina (ratios 3.5 and 3.8)
15. **Food and Beverage Services (ratio 1.9, 210 workers).** This specialisation is most pronounced in Byron (ratio 4.0)
16. **Other Food Product Manufacturing (ratio 1.7, 190 workers).** This specialisation is most pronounced in Richmond Valley (2.8) and Lismore (2.6)
17. **Forestry Support Services (ratio 3.3, 110 workers).** This specialisation is most pronounced in Byron (ratio 5.5) and Lismore (ratio 4.5)
18. **Poultry Farming (ratio 1.0, 100 workers).** This specialisation is most pronounced in Richmond Valley (ratio 3.5)
19. **Mushroom and Vegetable Growing (ratio 2.1, 170 workers).** This specialisation is most pronounced in Kyogle (ratio 2.3) and Byron (ratio 2.2)
20. **Fruit and Vegetable Processing (ratio 2.0, 100 workers).** This specialisation is most pronounced in Lismore (ratio 3.0), Richmond Valley (ratio 2.3) and Ballina (ratio 2.1)
21. **Clothing and Footwear Manufacturing (ratio 2.9, 90 workers).** This specialisation is most pronounced in Byron (ratio 6.7)
22. **Leather Tanning, Fur Dressing and Leather Product Manufacturing (ratio 3.4, 50 workers).** This specialisation is most pronounced in Richmond Valley (ratio 14.2) and Kyogle (ratio 9.5)

Enabling Industries - Location Quotients 2001 - 2016



Enabling Industries – Regional Specialisations Analysis

Enabling Industries provide the Engines of Growth with key support services. Enabling industries tend to cluster in larger centres, bridging client firms and pools of skilled workers.

Professional, Scientific and Technical Services, Rental Hiring and Real Estate Services and Information Media and Telecommunications are the Northern Rivers' key enabling industries.

As is the case for the engines of growth industries, the Region's economic diversity means ratios for the Region are not especially high.

However, review of ratios for individual localities identifies several specialisations. The role of Byron and Ballina as home to relatively strong shares of enabling activity becomes clear:

- Byron's specialisations in Professional, Scientific and Technical Services (ratio 1.6), Information Media and Telecommunications (ratio 1.6), Rental, Hiring and Real Estate Services (ratio 1.5) and Administrative and Support Services (ratio 1.4)
- Ballina's specialisations in Rental, Hiring and Real Estate Services (ratio 1.3) and Professional, Scientific and Technical Services (ratio 1.2).

Key sub-Industry strengths

At the sub-industry level, many groupings reflect concentrations well above the typical regional NSW shares.

Taking the scale of employment into account, the most significant sub-industry specialisations include:

1. **Building Cleaning, Pest Control and Gardening Services (ratio 1.1, 1,250 workers)**. This specialisation is most pronounced in Byron (ratio 1.5)
2. **Legal and Accounting Services (ratio 1.2, 1,150 workers)**. This specialisation is most pronounced in Ballina (ratio 1.4) and Lismore (ratio 1.3)
3. **Real Estate Services (ratio 1.1, 640 workers)**. This specialisation is most pronounced in Ballina (ratio 1.5) and Byron (ratio 1.4)
4. **Architectural, Engineering and Technical Services (ratio 1.1, 660 workers)**. This specialisation is most pronounced in Byron (ratio 2.1) and Ballina (ratio 1.2)
5. **Management and Related Consulting Services (ratio 1.3, 330 workers)**. This specialisation is most pronounced in Byron (ratio 2.2) and Ballina (ratio 1.5)
6. **Computer System Design and Related Services (ratio 0.9, 330 workers)**. This specialisation is specific to Byron (ratio 1.7)
7. **Auxiliary Finance and Investment Services (ratio 1.0, 240 workers)**. This specialisation is specific to Ballina (ratio 1.4) and Byron (ratio 1.2)
8. **Other Administrative Services (ratio 0.9, 240 workers)**. This specialisation is specific to Byron (ratio 1.6)
9. **Travel Agency and Tour Arrangement Services (ratio 1.6, 200 workers)**. This specialisation is specific to Byron (ratio 3.3) and Ballina (ratio 1.6)
10. **Market Research and Statistical Services (ratio 1.7, 170 workers)**. This specialisation is most pronounced in Byron (ratio 2.7), Kyogle (ratio 2.6) and Richmond Valley (ratio 2.3)
11. **Newspaper, Periodical, Book and Directory Publishing (ratio 1.2, 140 workers)**. This specialisation is specific to Byron (ratio 2.1) and Lismore (ratio 1.3)
12. **Water Supply, Sewerage and Draining Services (ratio 0.7, 120 workers)**. This specialisation is specific to Kyogle (ratio 1.4)

Enabling Industries – Regional Specialisations Analysis

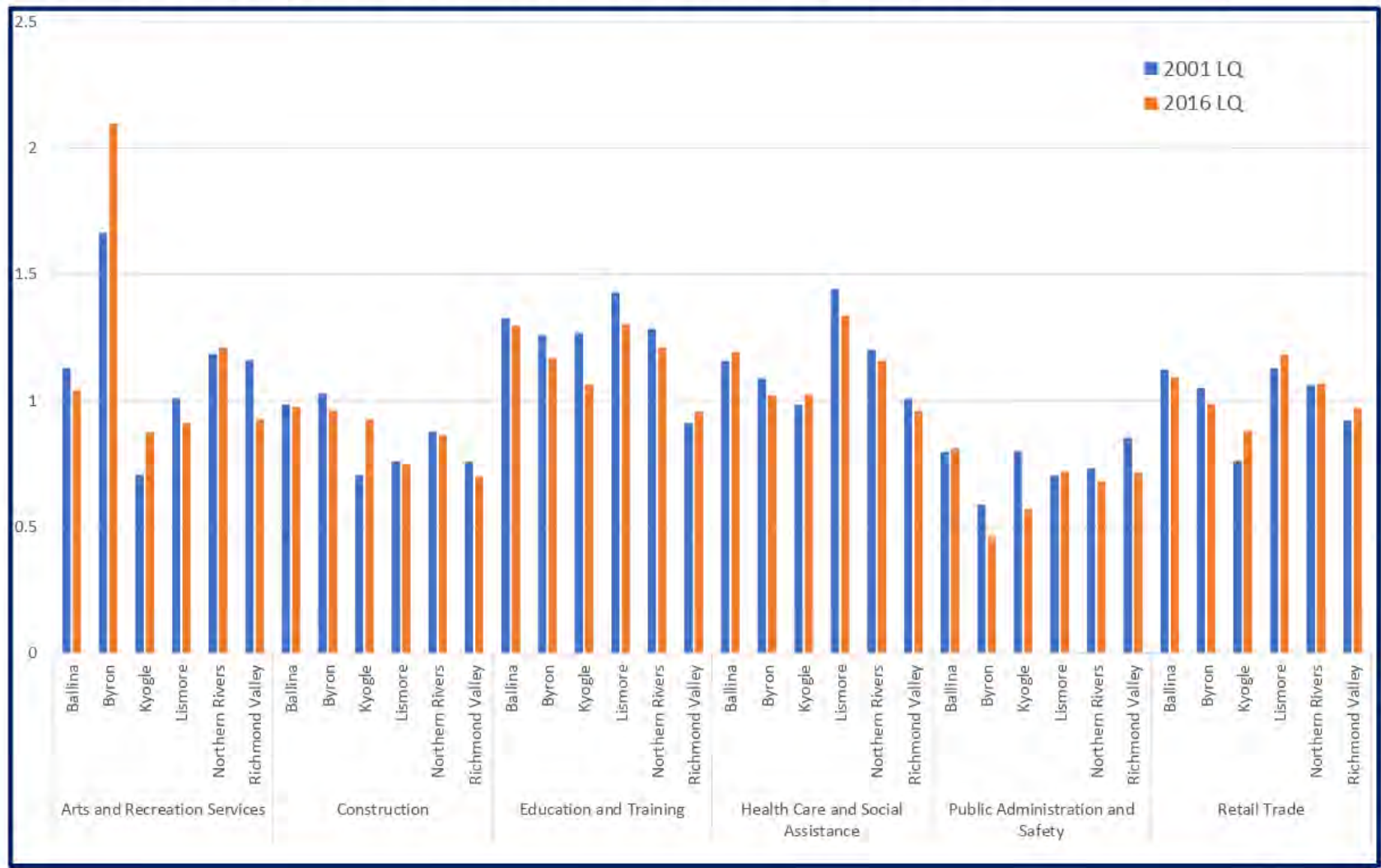
13. Motion Picture and Video Activities (ratio 1.3, 100 workers). This specialisation is specific to Byron (ratio 3.2)

14. Advertising Services (ratio 1.4, 100 workers). This specialisation is specific to Byron (ratio 3.6) and Ballina (ratio 1.4)

15. Property Operators (ratio 1.0, 100 workers). This specialisation is specific to Byron (ratio 1.6).



Population Serving Industries - Location Quotients 2001 - 2016



Population Serving Industries – Regional Specialisations Analysis

Population Serving Industries tend to be focused on serving the people who live in a region more so than the businesses operating within it.

Education and Training, Health Care and Social Assistance, Arts and Recreational Services and Retail Trade are the Northern Rivers' key population serving industries.

At the industry level, economic diversity means the ratios for the Region are not especially pronounced, with ratio for specialised industries no higher than about 1.2.

The only population serving industry with a notably low ratio is Public Administration and Safety. For the Region as a whole, employment in this industry is only about two thirds of what is typical for regional NSW. No locality has a ratio much above 0.8, with some having ratios of half or less.

Reviewing other differences across the Region, the most distinct features are:

- Byron's specialisation in Arts and Recreation Services (ratio 2.1)
- Lismore and Ballina's specialisations in education, health and retail, as the major population centres of the Region.

Key sub-industry strengths

At the sub-industry level, many groupings reflect concentrations well above the typical regional NSW shares.

Taking the scale of employment into account, the most significant sub-industry specialisations and ratios include:

1. **School Education (ratio 1.1, 3,780 workers).** This specialisation is most pronounced in Ballina (ratio 1.2) and Kyogle (ratio 1.2)
2. **Hospitals (ratio 1.1, 2,590 workers).** This specialisation is most pronounced in Lismore (ratio 1.6)
3. **Residential Care Services (ratio 1.1, 1,950 workers).** This specialisation is most pronounced in Richmond Valley (ratio 1.3) and Ballina (ratio 1.3)
4. **Supermarket and Grocery Stores (ratio 1.0, 1,620 workers).** This specialisation is specific to Kyogle (ratio 1.2) and Ballina (ratio 1.1)
5. **Other Social Assistance Services (ratio 1.2, 1,580 workers).** This specialisation is most pronounced in Lismore (ratio 1.6)
6. **Tertiary Education (ratio 1.4, 1,320 workers).** This specialisation is most pronounced in Lismore (ratio 2.1) and Ballina (ratio 1.5)
7. **Allied Health Services (ratio 1.4, 1,220 workers).** This specialisation is most pronounced in Byron (ratio 2.2) and Ballina (ratio 1.5)
8. **Local Government Administration (ratio 1.0, 1,210 workers).** This specialisation is specific to Richmond Valley (ratio 1.4), Kyogle (ratio 1.1) and Ballina (ratio 1.1)
9. **Pharmaceutical and Store Based Retailing (ratio 1.2, 950 workers).** This specialisation is most pronounced in Richmond Valley (ratio 1.3) and Lismore (ratio 1.2)
10. **Medical Services (ratio 1.2, 920 workers).** This specialisation is most pronounced in Ballina (ratio 1.4) and Byron (ratio 1.3)
11. **Clothing, Footwear and Personal Accessory Retailing (ratio 1.2, 780 workers).** This specialisation is most pronounced in Byron (ratio 1.8)

Population Serving Industries – Regional Specialisations Analysis

- | | |
|---|---|
| <p>12. Residential Building Construction (ratio 0.9, 700 workers). This specialisation is most pronounced in Byron (ratio 1.3)</p> <p>13. Specialised Food Retailing (ratio 1.3, 680 workers). This specialisation is most pronounced in Byron (ratio 1.8)</p> <p>14. Adult, Community and Other Education (ratio 1.3, 570 workers). This specialisation is most pronounced in Byron (ratio 2.6)</p> <p>15. Hardware, Building and Garden Supplies Retailing (ratio 1.2, 550 workers). This specialisation is most pronounced in Lismore (ratio 1.6) and Ballina (ratio 1.3)</p> <p>16. Other Construction Services (ratio 1.1, 540 workers). This specialisation is most pronounced in Kyogle (ratio 1.4) and Byron (ratio 1.4)</p> <p>17. Creative and Performing Arts Activities (ratio 2.6, 370 workers). This specialisation is most pronounced in Byron (ratio 6.8)</p> <p>18. Preschool Education (ratio 1.2, 440 workers). This specialisation is most pronounced in Kyogle (ratio 1.6) and Richmond Valley (ratio 1.4)</p> <p>19. Motor Vehicle Retailing (ratio 0.9, 380 workers). This specialisation is specific to Lismore (ratio 1.5)</p> | <p>20. Heavy and Civil Engineering Construction (ratio 0.7, 380 workers). This specialisation is specific to Kyogle (ratio 1.4)</p> <p>21. Building Construction (ratio 1.0, 360 workers). This specialisation is specific to Byron (ratio 1.6)</p> <p>22. Department Stores (ratio 0.8, 350 workers). This specialisation is specific to Ballina (ratio 1.3) and Lismore (ratio 1.2)</p> <p>23. Pathology and Diagnostic Imaging Services (ratio 1.2, 310 workers). This specialisation is most pronounced in Lismore (ratio 1.8) and Ballina (ratio 1.4)</p> <p>24. Land Development and Site Preparation Services (ratio 0.8, 280 workers). This specialisation is specific to Kyogle (ratio 2.4)</p> <p>25. Electrical and Electronic Goods Retailing (ratio 0.9, 220 workers). This specialisation is specific to Lismore (ratio 1.3).</p> |
|---|---|

Employment by Industry: Prevailing Strengths and Recent Changes

Economic changes since 2001 has seen both traditional strengths reinforced and the emergence of new opportunities for the Northern Rivers.

The bubble diagram integrates the regional strengths with the absolute scale and relative changes in the number of jobs supported in each industry:

- the size of each bubble reflects the scale of employment in each industry
- the positioning on the diagram reflects the relative change in job numbers in the 15 years to 2016 and industry ratios.

Implications of the diagram can be understood from various perspectives, but might most easily be seen by quadrant.

The upper left quadrant contains three (red bubble) specialised industries that have nonetheless seen significant declines since 2001 in the level of employment they support. Two of the bubbles, Manufacturing and Agriculture, have been combined to make both visible as they have a similar scale and location on the chart. Together, these industries account for about 14 per cent of total employment.

The lower left quadrant reflects two (green bubble) unspecialised enabling industries.

Each industry is relatively small (2 per cent or less), with declines as large as -50 per cent. Less than 20 per cent of workers are employed in sectors that have seen contractions in employment.

The lower right quadrant contains four (yellow bubble) unspecialised, potentially emerging industries with increases in jobs over the decade and a half to 2016. Relative increases in jobs were in the range 13 to 50 per cent, with the largest, most specialised industry, Construction, seeing the largest increases. Together, these industries account for about 17 per cent of total employment.

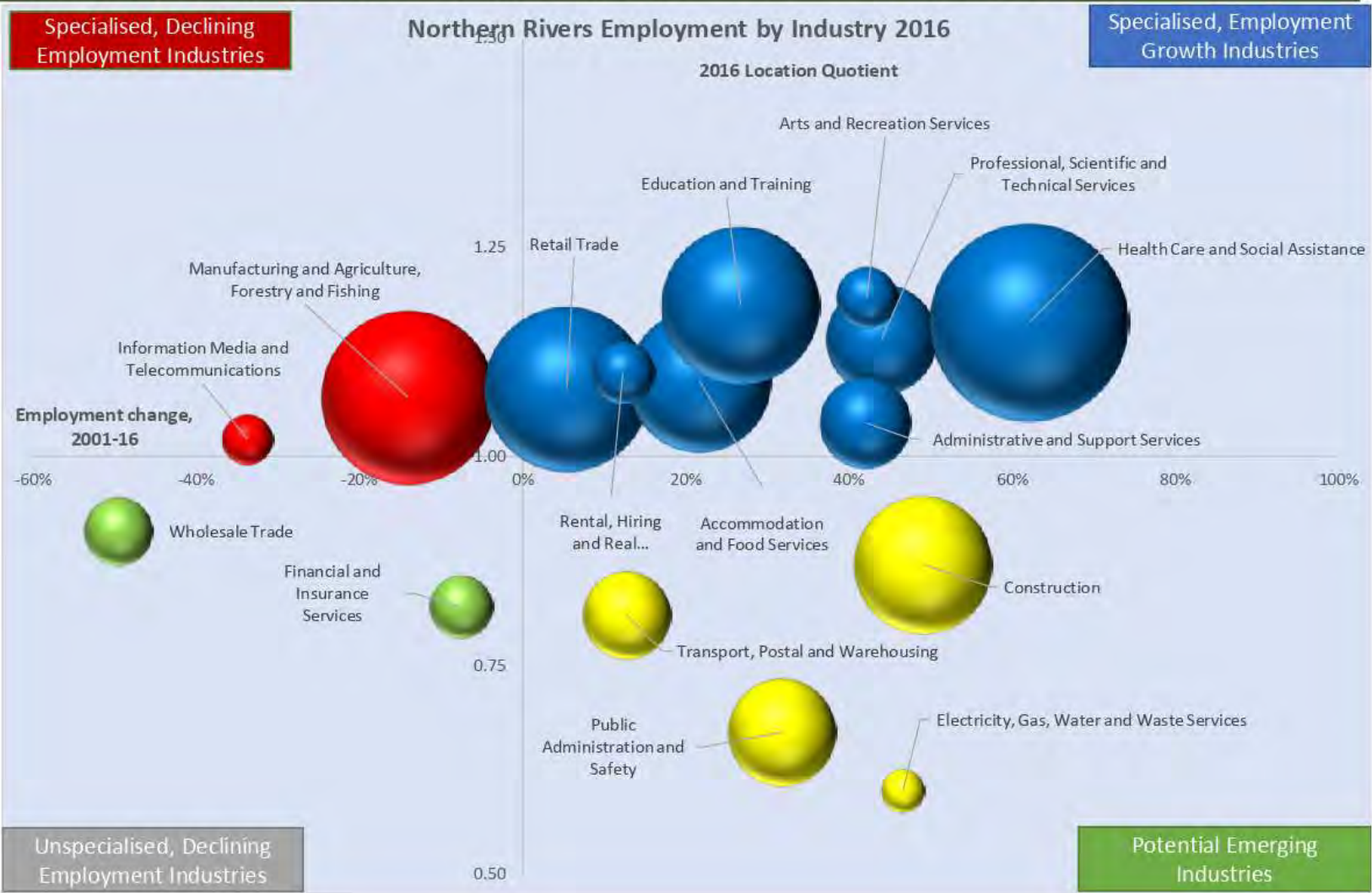
The upper right quadrant contains eight (blue bubble) specialised employment growth industries. While the strength of specialisation is not especially strong – with ratios broadly in the range 1.1 to 1.2 – the extent of growth in many cases is very substantial, with increases of more than 60 per cent in some cases.

In total, more than 60 per cent of all employment relates to the blue bubble industries. The largest industry, Health Care and Social Assistance, saw the greatest proportionate increase over the decade and a half to 2016.

Scale appears to be supporting employment growth. The blue bubbles are on average the largest among the four groupings – broadly speaking, between 1.5 to 4 times the size of the other bubble groups.



Employment by Industry: Prevailing Strengths and Recent Changes



Appendix C – Institutional Audit

Institutional Audit

Institutional Audit

Institutions play a fundamental role in the economic development process. Before a Regional Economic Development Strategy can be formulated, the local institutional capacity must be evaluated.

A successful Economic Development Strategy for the Northern Rivers regional economy would be the one that capitalises on the institutional strengths that exist in the Region.

This section lists some of the key institutions in the Northern Rivers Region as well their role in the economic future of the Northern Rivers.

Overall, the Northern Rivers can be considered to have an exceptional range of institutional endowments reflective of no major deficiencies.

Councils

Five local governments comprise the Northern Rivers Region, and each plays a pivotal regulatory, support and coordination role in the economic future of the Region. The following councils make up the Region:

- Ballina Shire
- Byron Shire
- Kyogle Shire
- Lismore Shire
- Richmond Valley Council

NSW Department of Industry - Northern Rivers Region - Lismore

The Department of Industry creates conditions for the NSW community to prosper, ensuring we have a highly-skilled workforce, we manage our natural resources sustainably and we encourage investment and competition.

Northern Rivers Food

A group of growers, food artisans, manufacturers, restaurateurs, retailers and distributors working as a group to facilitate the development, growth and sustainability of the food businesses in the Northern Rivers.

Regional Development Australia - Northern Rivers NSW

Regional Development Australia (RDA) is a partnership between the Australian, state, territory and local governments to develop and strengthen the regional communities of Australia. RDA Committees will work with all three tiers of government, regional business and the wider community to boost the economic capability and performance of their region.

Northern Rivers NSW Business Chamber

Regional office for the Northern Rivers with sub-offices in local councils. It aims to give a voice at local, regional, state and federal levels of government through the lobbying power of the NSW Business Chamber and the united chamber movement

Office of Regional Development - Department of Premier and Cabinet

The Office leads the NSW Government's contribution to making regional NSW a productive place to invest and to produce goods and services, thereby creating jobs and opportunities for regional NSW.

Institutional Audit

Health

The Northern Rivers fall under the Northern NSW Local Health District, it is a non-commercial government funded health organisation that provides health services in five hospitals; Northern Rivers- Ballina District Hospital, Byron Central Hospital, Lismore Base Hospital, Kyogle Memorial Hospital and Casino Memorial Hospital.

Justice

A police station is located in each of the five councils in the Northern Rivers.

There are local courts in each of the council's main urban centres.

Higher Education

- Southern Cross University Lismore Campus – had an enrolment of just under 2000 students in 2016.
- TAFE facilities located in:
 - Casino
 - Wollongbar
 - Lismore
 - Ballina

Emergency Services

There are Ambulance Services and State Emergency Services (SES) located in each of the five councils in the Region.

Fire and Rescue NSW are located in Ballina, Alstonville, Mullumbimby, Kyogle, Bangalow, Brunswick Heads, Byron Bay, Lismore, Goonellabah, Kyogle, Casino and Coraki, with Rural Fire Services also dispersed across the Region.

Core Competencies

Core competencies represent the ability of a region to organise and steward its resources to produce goods and services. They refer to the set of skills, technology, resource applications and management unique to that region.

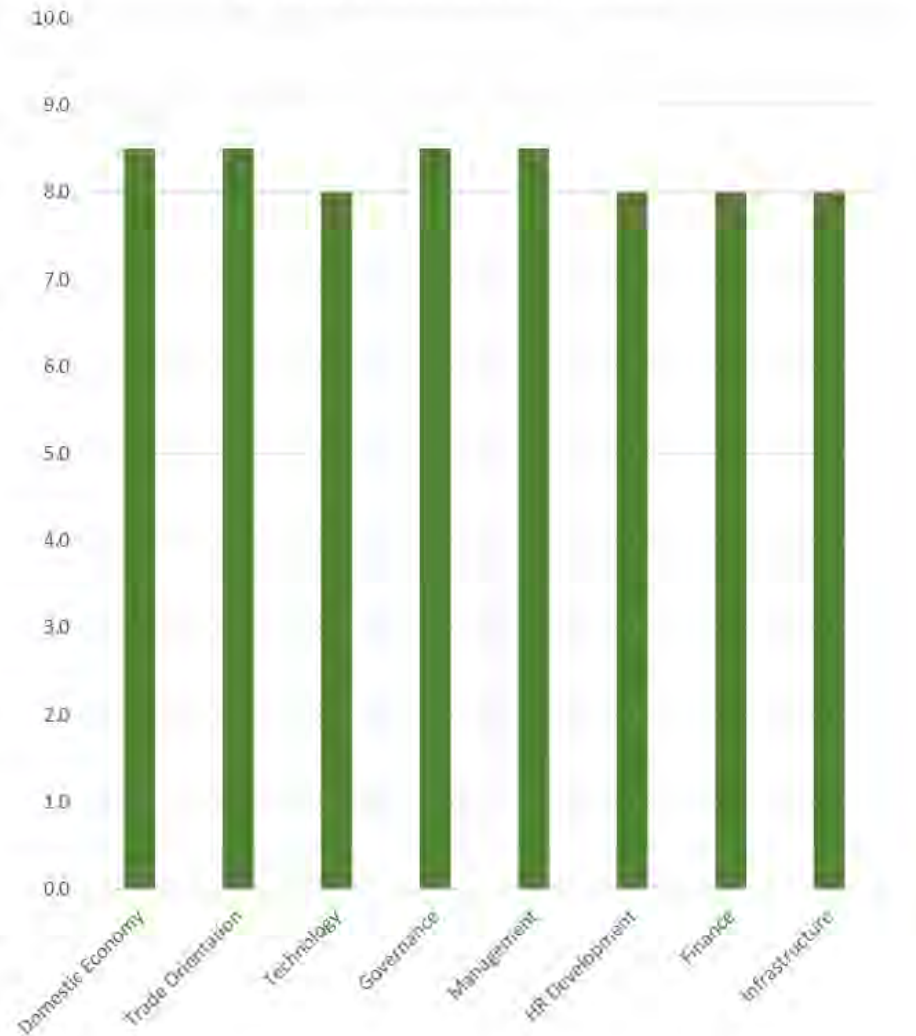
The scores in the chart, right, reflect subjective judgements about the relative competencies of the Northern Rivers. These judgements have been informed by a ranking of the sub-components as either Strong, Average or Weak, considering the quantitative data, stakeholder feedback and insights and institutional evidence of the quality of stewardship.

The competency scores for the Northern Rivers reflect the fact that the Region could not be considered to have any significant deficiencies in organisation or stewardship given the population base and endowments of the Region.

Overall, scores for the Northern Rivers reflect an exceptional standard of competencies for a regional context. Relative to one another, the scores reflect that

- the Region's greatest strengths lie in its domestic economy, trade-oriented activities and quality of governance and management
- while Human Resources are in general very good, significant quantities of labour imported from other regions reflect opportunities to further enhance the supply of labour and well-matched skills from within the Region
- the quality of governance, management and other key enabling aspects of regional competency are robust to exceptional
- while acknowledging scope for improvement in addressing transport constraints in particular areas, in general, the infrastructure of the Region is of very high quality.

Northern Rivers Core Competencies



Appendix D – Infrastructure Audit

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Infrastructure Audit

Infrastructure Audit

Infrastructure is an important enabler of economic growth. Customers and businesses rely on the physical and organisational structures and facilities that exist in a region, or that link regions to other parts of the country or globe.

The Northern Rivers Economic Development Strategy considered the opportunities and limitations presented by the infrastructure in the Region.

The Northern Rivers can generally be considered to have an exceptional standard of infrastructure endowments.

The immediate challenge in infrastructure policy is continuing to provide key enabling infrastructure for housing supply and industrial use.

Overtime, existing freight transport network constraints will worsen existing conflicts due to the forced integration of freight and commuter traffic on the Bruxner Highway.

Roads

The Region lies at the crossroads of key transport links connecting Sydney and Brisbane. Major roads in the Region include:

- Pacific Highway
- Bruxner Highway
- Summerland Way
- Lismore Road

Bridges

Kyogle Shire has most bridges in an LGA in NSW, of which:

- 212 are Timber bridges
- 168 are concrete bridges

Dams

The Dams Safety Committee has identified and oversees the following dams in the Region in accordance with Schedule 1 of the Dams Safety Act 1978: Toonumbar, Petrochilos, Emigrant Creek, Rocky Creek dam.

Airport

There are two regional airports Ballina Airport and Lismore Airport. Ballina acts as the Region's airport with services to Newcastle, Melbourne and Sydney. Lismore airport provides services to Sydney and Grafton.

Energy

Essential Energy provides the regions with its electricity, however in 2016 Enova Energy the first community owned renewable energy retailer was established targeting Northern Rivers.

Rail

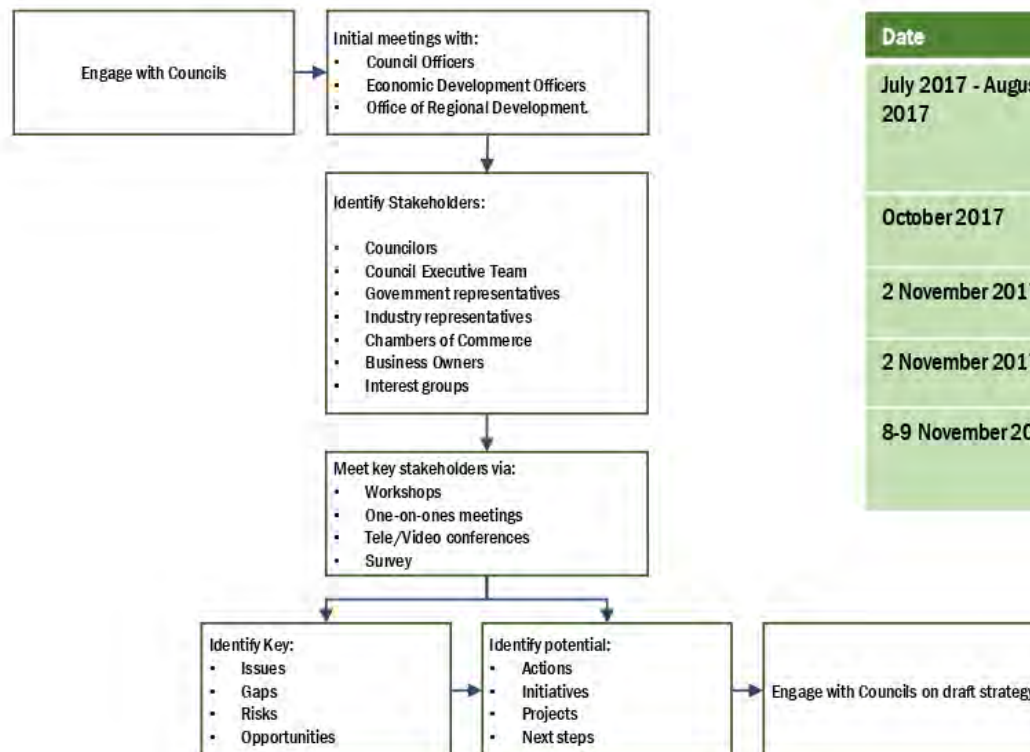
The North Coast rail line stops in two of the five locations, Kyogle and Casino, where there is only one service a day each way for the stations connecting them to Sydney and Brisbane.

Water

Rous Water County Council provided bulk water supplies for Ballina, Byron, Lismore and Richmond Valley.

Appendix E – Consultation

Consultation Approach



Key dates

Date	Stakeholder
July 2017 - August 2017	Individual inception meeting with General Managers and Council Executive Team Initial collective meetings of the Councils
October 2017	Further consultation with stakeholders, councillors and council officers
2 November 2017	Northern Rivers Summit
2 November 2017	Member of Parliament Briefings
8-9 November 2017	Stakeholder engagements – 1:1 meetings, collective meetings, councillors, specialist council staff

Consultation Outcomes - Connectivity

Objectives	Opportunities	Issues, Gaps and Risks
<ul style="list-style-type: none"> • Enable ease of movement of people, goods, data and ideas through efficient transport and digital connections. • Integrate the Region's own communities and services effectively, and link its people and businesses to knowledge, customers and markets beyond its physical boundaries. 	<ul style="list-style-type: none"> • Improve the efficiency of freight movements within and beyond the Northern Rivers • Realise seamless 'farm gate to gateway' connections to national global markets through better integrated local and regional transport networks • Improved market access via Inland Rail and Wellcamp Airport • Enhance passenger gateways into Ballina • Connect the people and businesses of the Region to digital networks and technologies to a first rate standard. • Improve the efficiency of passenger movements within and beyond the Northern Rivers • Improved road corridor productivity and safety 	<ul style="list-style-type: none"> • Lack of B-double access for high productivity configurations on the Bruxner and Summerland Way • Poor quality local roads causing excessive vehicle damage • "Last mile" connectivity constraints on local roads to and from farm gates and production plants • Insufficient and / or outdated data on freight movements and limited or no information or suppressed freight demand • Localised congestion in regional centres • Arterial transport network constraints impeding productivity and opportunity • Costly connections to major metropolitan markets and international gateways • Lack of transport services to integrate the communities, precincts and places of the Region • Unreliable or limited digital coverage, capacity and reliability across the Region, with numerous coverage blackspots

Consultation Outcomes - Inputs, Skills and Jobs

Objectives	Opportunities	Issues, Gaps and Risks
<ul style="list-style-type: none"> Realise first class development and management of the Northern Rivers' factors of production and natural resources, thereby realising better inputs, skills and job opportunities. Reinforce the strengths of the Region and position it to capitalise on opportunities that emerge over time through effective stewardship. 	<ul style="list-style-type: none"> Further expand offerings at SCU Lismore, including through partnership with enabling technology and services startups Facilitate the development of emerging clusters, specialisations and businesses, like the enabling industries in the Region. Foster greater entrepreneurialism and growth in small businesses. Provide local training courses that are responsive to local industry needs Establish pathways from school through training, to meaningful and productive jobs to spread prosperity across the Region. Provide land use zoning and enabling infrastructure to activate residential and commercial land and allow increases in accommodation Vast residential zoned Crown land identified for development in future land use strategies. Develop integrated whole-of-region tourism branding, including food, arts, adventure and environmental tourism experiences Making more of endowments like Ballina harbour 	<ul style="list-style-type: none"> Limitations in literacy Limited scale of agricultural properties Ensure businesses in the Region have a sufficient and secure supplies of land, energy, water and sewerage services NDIS increasing competition for workers Shortages of Allied Health workers Sourcing and training local workers to fill key operational needs of local businesses Generate employment opportunities for local workers Reduced access to job opportunities across the Region because of limited public transport options High cost and limited reliability of energy Work with the private sector and industry to foster greater entrepreneurialism and growth in small businesses Limited data on tourist behaviour

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Consultation Outcomes - Liveability

Objectives

- Keep the Northern Rivers a highly livable place for people to reside in or visit
- Sustain quality of life through a pristine natural environment and easy access to social amenities, cultural facilities and educational, health and social services that meet the needs of a diverse community.

Opportunities

- High quality health and education services
- Pristine natural environment
- Providing enabling infrastructure that addresses "first mover disadvantage" for developers
- Diversify the supply of housing types to meet the needs of the community
- Improving and integrating services across the Region through effective transport
- Holistic precinct planning to improve and integrate precincts
- New ways of celebrating indigenous and multicultural heritage
- Improve access to cultural, sporting and social recreational facilities and services in the Northern Rivers

Issues, Gaps and Risks

- Meeting community expectations for high quality health and education services
- Servicing a growing, ageing population cost effectively without compromising quality or care
- Realising new housing supply and housing choice in a cost effective and timely way
- High rents and limited rental options
- Cultural, sporting and social infrastructure and services to attract and retain people
- Improving the functionality of key precincts across the Region and integrating them effectively
- Supporting regional networks for essential services through effective public and community transport services
- Service models that keep ageing residents in their homes and communities for longer
- Conflict between 'tree changers' and traditional agricultural and industrial land uses
- Drug use and lack of treatment options

Consultation Outcomes - New Ideas

Objectives

- Overcome barriers to opportunity through New Ideas that sees the Region grow, prosper and realise its potential.
- Reach innovative solutions through effective collaboration among the diverse people of the Northern Rivers and strong advocacy and active engagement with external governments, institutions and interests.

Opportunities

- Pursue a Northern Rivers City Deal and other new forms of partnership with the State and Federal Government
- Integrate the perspectives of multiple State agencies through a Regional Development Commission
- Engage the private sector to provide industry insight when developing business cases
- Adopt a "customer focused" one stop shop approach to regulating activities, not just delivering services
- Leveraging the collegiality of Local and State Government, as well as NOROC, and the strength of the non-Government sector in the Northern Rivers
- Integrating new innovative businesses with the traditional industries of the Region
- Accelerate the maturity enabling business service start ups
- Introduce a Special Economic Zone and introduce stronger linkages to Queensland through the Cross Border Commissioner

Issues, Gaps and Risks

- Fragmented regulatory requirements and policies across agencies and levels of government
- Heavy handed approaches to regulation unnecessarily constraining opportunities
- Develop innovative delivery solutions through new approaches to collaboration and partnership
- Achieving timely and consistent development consent outcomes
- Increase investment certainty and confidence for the private sector
- Access to funding and financing for small businesses
- Large economic costs from taxes, levies, fees and charges

Appendix F – Risks

Risks

Key risks posed by issues and gaps identified in consultation

Connectivity risks

- Insufficient and / or outdated data on freight movements and limited or no information or suppressed freight demand means transport investment decisions are misinformed
- Poor quality transport assets constrain access to high value export opportunities
- Unreliable or limited digital coverage, capacity and reliability across the Region, impedes the adoption of technology and hampers the development of emerging professional services industries
- A lack of transport services means the communities, precincts and places of the Region are less integrated and productive than they should be.
- Road constraints limit opportunities to distribute Byron visitors across the Region

Resources risks:

- Limited scale of agricultural properties inhibits productivity
- Labour shortages inhibit the degree to which the Region realises the benefits of growing demand for population services like the NDIS

- High cost and limited reliability of energy constrains the development of manufacturing activities

Liveability risks:

- High cost housing hampers the rate of increase in the Region's population and internal markets
- Cultural, sporting and social infrastructure are inadequate to attract and retain families
- Key precincts are not functionally organised or are poorly integrated, hampering productivity
- Limitations in the housing stock mean older people leave their communities and lose their independence earlier than necessary
- Ongoing migration increases conflict between 'tree changers' and traditional agricultural and industrial land uses
- Drug use and lack of treatment options creates negative perceptions of the Northern Rivers as a place to move to

New Ideas Risks:

- Growth is slower as traditional problems with intergovernmental relations are sustained

- Heavy handed approaches to regulation unnecessarily constrain opportunities
- Slow and unpredictable development consent outcomes increase risks and make developments infeasible.

Other Risks:

- Economic and governance – Slow downs in growth across Asia reduce the market for Northern Rivers' produce
- Environmental and societal – population increases place pressure on the environment

Appendix G – Focus Opportunities

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Focus Opportunity – Growing Markets for the Western Hinterlands

Expanding Markets Mean Greater Opportunities for the Western Hinterlands

The central and western hinterlands of the Northern Rivers are home to some of the State's most productive agricultural lands.

Part A of this Strategy reflected the Region's specialisations in beef, dairy and meat in Kyogle and Casino, among other commodities and products. These strengths underline the opportunity to market produce to growing populations on the east coast and beyond.

The scale of ongoing growth in population centres shows the opportunity for the Northern Rivers is tremendous.

The Queensland Government's recently released South East Queensland Regional Plan, *Shaping SEQ*, projects that the region's population will grow from 3.5 million to 5.3 million over the next 25 years. Similar increases in population are projected for Sydney and Melbourne.

The Commonwealth Government's 2012 White Paper, *Australia in the Asian Century*, concluded that Asia's demand for food is surging and would continue to do so over the decades ahead. The White Paper projects Asia's food demand will double between 2007 and 2050 (\$USD3 trillion, up from \$USD1.5 trillion), with most of the additional demand attributable to China.

The White Paper also observed that while Asia is home to some of the world's largest agricultural economies, growth in demand is likely to outstrip increases in local production, giving Australian exporters the chance to fill the gap.

By commodity, much of the increase is expected to be in fruit and vegetables, meat, cereals, dairy products and fish – products well matched to the Northern Rivers' agricultural production profile.

Despite significant investments in network and gateway infrastructure, key freight transport links are constrained

The Northern Rivers is fortunate to have some significant enabling infrastructure endowments that make it easier to get its valuable freight to market efficiently, reflected in the map right.

For example, excellent gateways to external markets are available at Brisbane West Wellcamp Airport, Gold Coast International Airport and the Port of Brisbane.

High productivity connections to markets and gateways are also improving. The Pacific Highway has been duplicated from Ballina to the border. The New England Highway similarly allows for HML access, while Inland Rail (alignment in orange) will improve choice of modal transport options and connectivity into Brisbane and Melbourne.

However, remaining gaps in the network are barriers to realising the region's opportunities. Constraints on key road links prevent high productivity configurations and mass limits:

- the Bruxner Highway's HML 25 metre B-double access ends west of Casino (red shading in the constrained western section)
- the Summerland Way's HML 25 metre B-double access ends north of Kyogle (red shading), with further time a cost imposed by the Mt Lindesay alignment
- 'first mile' local road constraints from the farm gate lead to inefficiencies, significant vehicle damage and / or unreliable access.

For some locations, it is a case of great opportunity going begging. Excellent gateways and HML links are in place; but gaps in the network lead to inefficient logistics.

For example, Bruxner Highway constraints west of Casino mean Tabulam's producers can't reach the HML corridors on the New England Highway to the west, nor Summerland Way and the Pacific Highway to the east, with a 25 metre B-double HML configuration.

Closer to Casino and Kyogle, some producers can use HML B-doubles to reach the markets and gateways to the north. Producers close to Kyogle and Casino might use Summerland Way to access the Bruxner's east, then head north on the Pacific Highway.

Focus Opportunity – Growing Markets for the Western Hinterlands



But even this route means extra costs and missed opportunities. This route mixes freight traffic with passenger movements, causing delays and unreliability on the eastern Bruxner and Pacific Highway access into Brisbane. Logistics would be more efficient if HML B-double access were available to the north of Kyogle on the Summerland Way – and especially so if re-aligned around Mt Lindesay.

A producer-led freight study should inform investment programs to complement Inland Rail

Inland Rail creates a chance to move more freight onto rail and separate it from commuters. Competing terminals – in the Region, at Casino or beyond it, on the New England Highway or in Bromelton – can offer producers a choice of routes to markets or gateways. Building the case for 'first mile' / 'last mile' links and lifting the Western Bruxner and Summerland Way to HML standard for longer B-doubles should start with a 'bottoms up' freight study to assess volumes.

Focus Opportunity – Burgeoning Eastern Tourism & Creative Hubs

Ballina and Byron are the Northern Rivers' prime tourism magnets

Byron and Ballina are the Northern Rivers' tourism hubs, drawing highly significant amounts of visitor expenditure to the Region.

Tourism Research Australia data on visitor nights and expenditure (below) show the markedly higher intensity of tourism on the coast compared to inland.

Part A of this Strategy reflected the underlying strengths of the Ballina and Byron tourism offering, including the appeals of the natural environment, local culture, branding and generally excellent network infrastructure, like the Pacific Highway and Ballina Airport.

However, some key needs remain unaddressed. Tourism has put local infrastructure under pressure. In other cases, enabling investment is required to realise the full potential of the Region's endowments.

Byron's roads are not coping with increases in traffic

Increases in Byron's popularity with visitors run the risk of becoming too much of a good thing. Road congestion has continued to mount as Byron's has grown from a sleepy surf town, into a globally renown, iconic destination.

As the main Pacific Highway link for visitors from the north, the Ewingsdale Road corridor (pink on the map) has borne the worst of traffic increases over time. It serves as the primary connection to the CBD, main beach, the arts and industry precinct, Byron Bay hospital and the proposed West Byron development.

To address the costs of congestion and unreliability, Byron Shire Council has developed a \$113.5M corridor strategy for Ewingsdale Road. This first of the program's seven stages is a CBD bypass which would delineate its traffic from travel to other destinations at an estimated cost of \$10.5M. A detailed business case for the program is an immediate priority to support tourism in Byron.

Ballina's harbour can be fully activated through complementary investments

Ballina's tourism growth over time reflects increasing returns on its natural and built endowments, especially its river and beaches.

While the present day returns are highly significant, opportunities to realise more again for the Region and its visitors remains.

A Marina Master Plan adopted by Ballina Shire Council for the existing working harbour near Richmond River and Fishery Creek represents such an opportunity (purple on the map).

The Master Plan indicative costing is \$15M, including provision for public space, retail, which could include a regional seafood showcase, and an enlarged wet area and dry storage areas for boat berths. Adjoining land is mostly already zoned for complementary residential and industrial uses.

The key next step is a detailed business case. This should include a preferred delivery model, a full accounting of urban renewal benefits and opportunities and the need for works to address operational and safety issues posed by the Richmond River sand bar.

Byron and Ballina need to harness their great boom in creative professionals

The Northern Rivers' coastal lifestyle appeals to residents as well as visitors. The upper left and right figures show many highly skilled professionals have moved to Byron and Ballina in the last 10 years. Growth on the Northern Rivers coast outstrips Lismore and other larger centres further south by a wide margin.

Byron attracts a different mix of professionals than elsewhere. In most places, 'traditionals' like lawyers, accountants and engineers dominate. In Byron (and Ballina to some degree), 'creatives' in scientific research, specialised design, architecture, advertising, consulting and management are dominant.

Focus Opportunity – Burgeoning Eastern Tourism & Creative Hubs

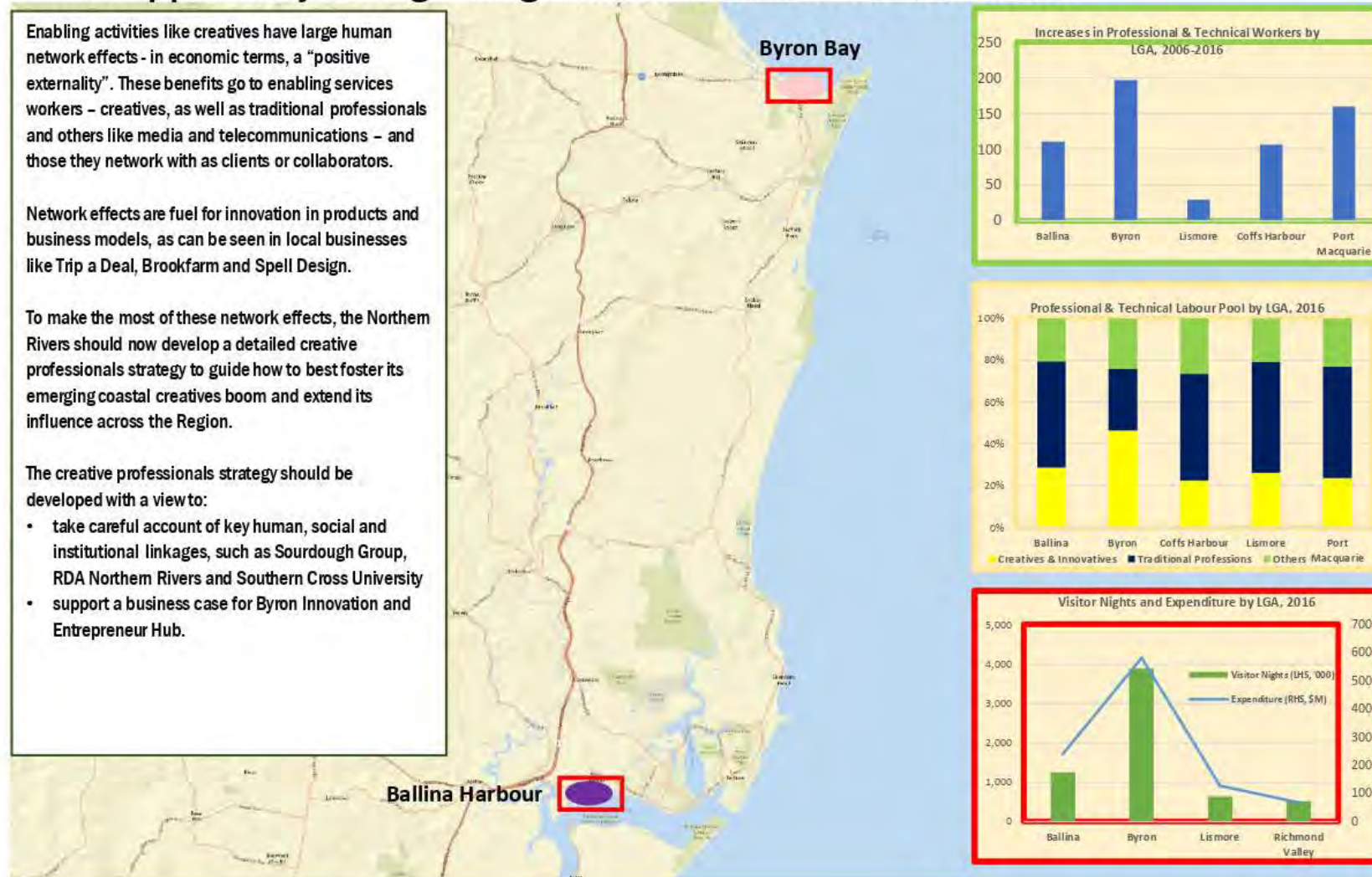
Enabling activities like creatives have large human network effects - in economic terms, a “positive externality”. These benefits go to enabling services workers – creatives, as well as traditional professionals and others like media and telecommunications – and those they network with as clients or collaborators.

Network effects are fuel for innovation in products and business models, as can be seen in local businesses like Trip a Deal, Brookfarm and Spell Design.

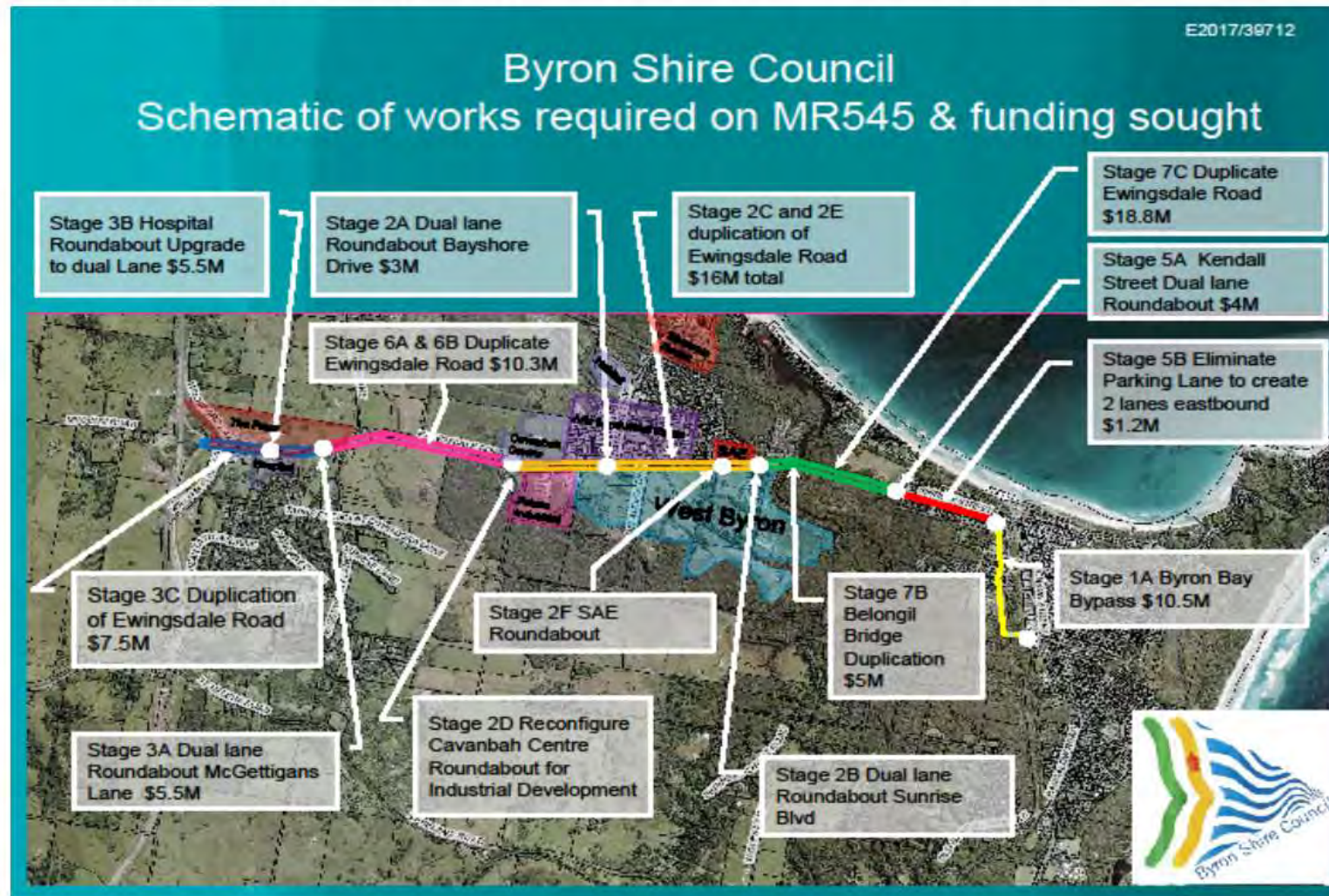
To make the most of these network effects, the Northern Rivers should now develop a detailed creative professionals strategy to guide how to best foster its emerging coastal creatives boom and extend its influence across the Region.

The creative professionals strategy should be developed with a view to:

- take careful account of key human, social and institutional linkages, such as Sourdough Group, RDA Northern Rivers and Southern Cross University
- support a business case for Byron Innovation and Entrepreneur Hub.



Focus Opportunity – Burgeoning Eastern Tourism & Creative Hubs



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Focus Opportunity – Burgeoning Eastern Tourism & Creative Hubs

BALLINA MARINA MASTER PLAN - OPTION ONE



Ballina Marina Master Plan

Ballina Marina Master Plan Option One

Jackie Amos Landscape Architect + Keiley Hunter Town Planning + de Groot and Benson Consulting Engineers + Andrew Tremelling Perspective Artist



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Oct 2017

Focus Opportunity – Pushing Lismore's Partnering Strategy to a Regional Level

Lismore's Regional City status reflects its growing role as the service and economic hub of the Northern Rivers

Lismore's specialisations underline its role as the services hub of the Northern Rivers.

Specialised services offered in Lismore are diverse - spanning Health, Tertiary Education, Retail, Social Services - recognising its pivotal status as the geographic and operational heart of the Region.

The intrinsic nature of Lismore within the Region's economy and services can be seen in many things, including its labour market linkages with other LGAs.

2016 Census data shows 5,900 residents from other LGAs working in Lismore, with 3,350 Lismore residents demonstrating the opposite. Ballina and Richmond Valley hold the strongest linkages, with 20 per cent of their labour pools working in Lismore, with Byron (750 workers) and Kyogle (375 workers) links also significant.

The whole region as stakeholders in Lismore's prosperity and strategies

A key implication of the central role of Lismore is that its singular success is a key factor in carrying the Region as a whole towards greater prosperity and better services.

The good news for the Region is that Lismore already has effective plans and strategies in place for its future development. Two central planks are the Council's Partnering Strategy, and the Central Growth Strategy within it.

The essence of the Partnering Strategy is several heads are better than one when trying to achieve great outcomes for Lismore and the Northern Rivers, and collaboration with the community, government agencies and NGOs will lead to more action and better results.

The Central Growth Corridor Strategy has the widest scope of any Partnering Strategy initiative. It consists of twelve projects across four precincts in Lismore's centre (reflected in the map on the adjoining page):

- the CBD
- the Health Precinct, centred on the Hospital
- the Sport and Recreational Precinct, adjoining the CBD and Health precincts
- Riverside, to the west of Wilson's River

The success intended by the Strategy is:

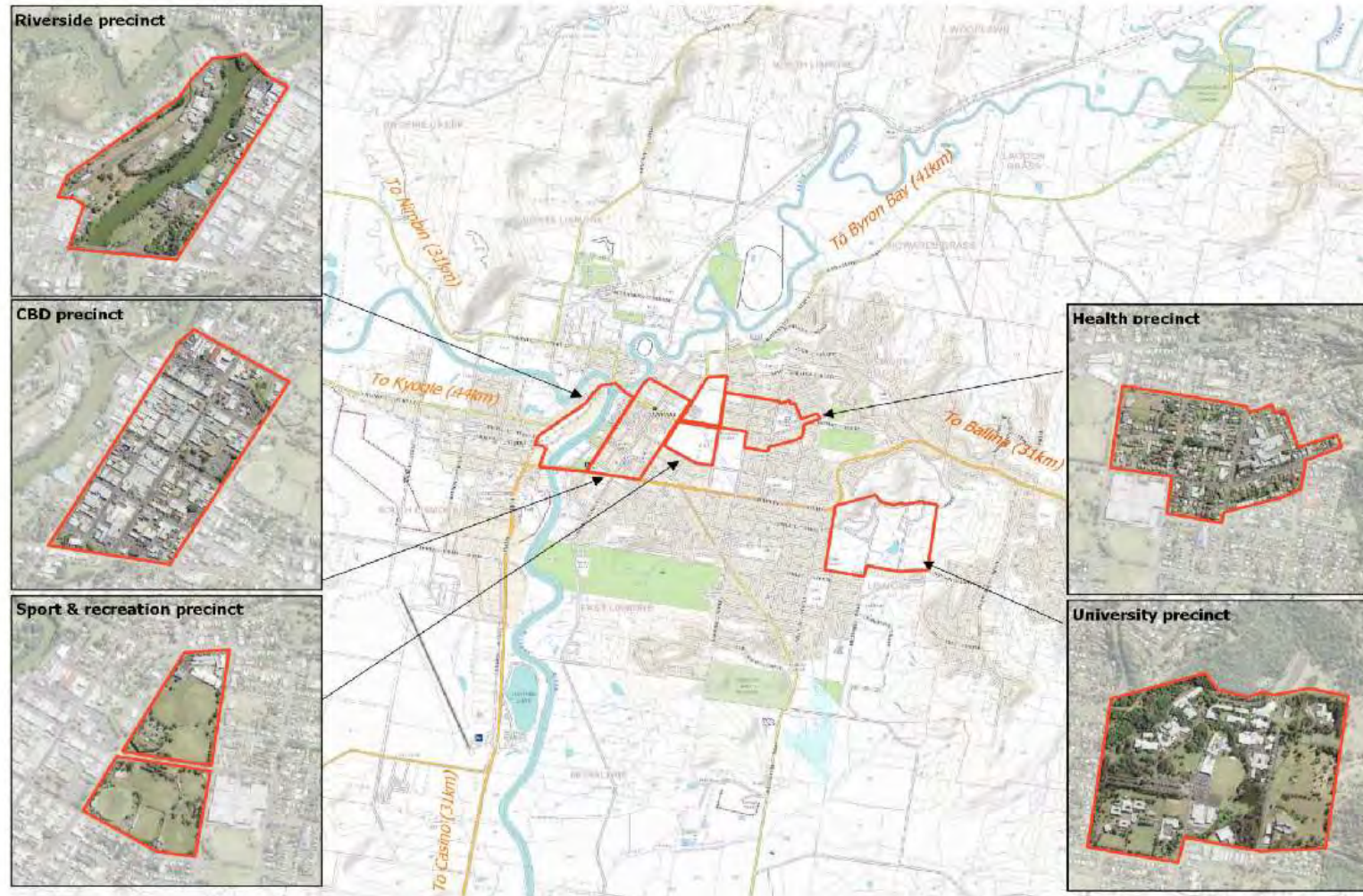
- a growth corridor powering city expansion
- vibrant open spaces
- successful businesses contributing to the growth and attractiveness of the city
- housing supporting the growth of the medical precinct
- enhanced medical facilities that are well integrated with the community.

A key opportunity would be to integrate the Southern Cross University Campus (see map) with the four Partnering Strategy precincts. Better connectivity between the University and city centre can spur and shape city development.

Whole of region planning approach could also include:

- the focus opportunities or other projects listed for the other LGAs in this Strategy
- community and regional transport linkages improving access to Lismore's key health, education and retail centres, perhaps including autonomous vehicle trials
- regionally significant Partnering Strategy projects, like the library, gallery and Oakes Oval stadium.

Focus Opportunity – Pushing Lismore’s Partnering Strategy to a Regional Level



Appendix H –

The Building Blocks of Economic Growth

The Building Blocks of Economic Growth

Promoting economic growth

The role of our regions

In an environment where cities continue to strengthen their position as economic engines, the question of what regions need to do to ensure that they continue to contribute to the nation's wealth and remains relevant.

Promoting regional economic development is at the heart of what this Strategy seeks to achieve. Regional economic development seeks to expand the value and capabilities of existing businesses, and facilitate the growth of new businesses. In turn, the additional activity generated by businesses should increase the number of jobs available, as well as the earnings of employees.

There are uneven levels of growth across the regions in NSW. Some regions are growing strongly both in terms of population and economic opportunity. However, some regional communities face great challenges in terms of population decline, structural change, distance, and the impact this has on service delivery, infrastructure investment, and cultural and social development.

The Strategy outlines tailored strategies to address the specific priorities of the region to help industries to thrive, leading to strong employment growth and strong regional economy and future prosperity.

The "building blocks" of economic development

Many factors contribute to the economic potential of a region.

Some factors are inherent advantages and endowments, like geography or other features of the natural environment, that can be difficult to influence through policies and investments. But in many other cases, there is much governments can do to enhance their advantages and endowments and provide stronger enabling conditions for greater private investment and initiative.

A key step towards a coherent economic strategy is identifying what these 'building blocks' for growth are, as set out in the figure on the next page. These enabling keystones are interrelated, and can be locked in together through a credible economic plan, consistent with the identified strengths, endowments and opportunities of a region.

Some of the key ingredients

At a most basic level, economic development can be achieved and enhanced through one of the following three 'P's:

- More **People** which increases the size of the local market
- More **Participation** to increase the size of the labour pool
- Higher **Productivity** to increase the value add each worker delivers.

Targeted planning and investment

Increasing the three 'P's is a challenge in regional areas. Often, all three drivers are moving in the wrong direction. Increasing these 'P's in an efficient and effective way means investments need to be targeted into the right areas.

Research undertaken by the Department of Premier and Cabinet's Centre for Economic and Regional Development indicates the economic development primers work best where they promote existing strengths linked to local endowments.

Increasing global competition means industries without a comparative advantage from existing activities or existing resources are less likely to succeed.

This Strategy therefore places a high emphasis on focusing on areas that bolster existing strengths rather than targeting investments in speculative areas that are yet to be proven. Investment must consider improvements in the Region that are sustainable and equitable.

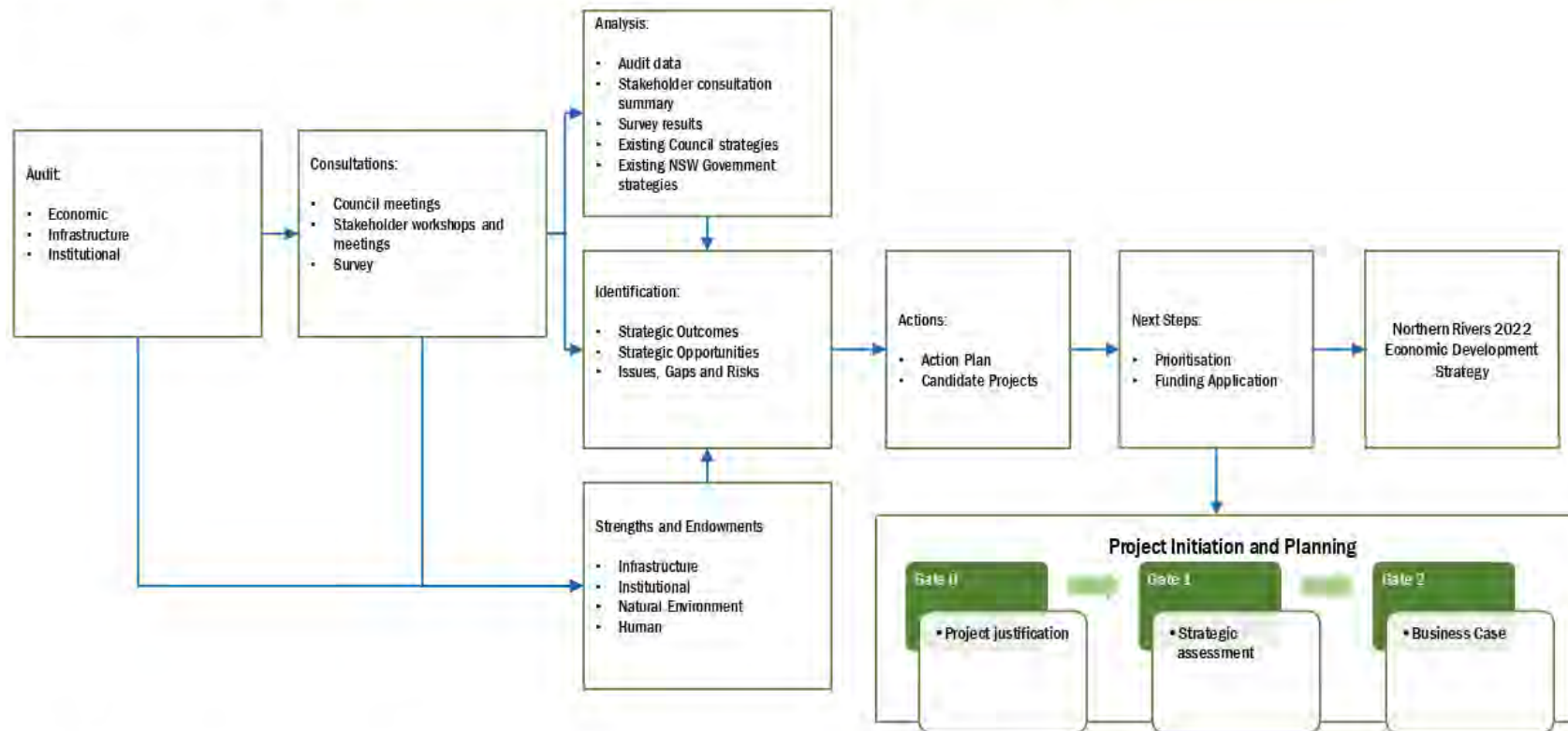
Improving standards of living across regional communities and ensuring that the Region's economic base is resilient and adaptive to change are also important considerations. Therefore, this Strategy considers measures that deliver improvements in the four key strategic outcomes:

- Connectivity
- Inputs, Skills and Jobs
- Liveability
- New Ideas



Appendix I – Methodology

Northern Rivers - Regional Economic Development Strategy Methodology



KEY TASKS AND STEPS IN REGIONAL ECONOMIC DEVELOPMENT STRATEGY DEVELOPMENT

- Undertaking economic, infrastructure and institutional audits and integrating them into regional strengths and endowments
- Reviewing existing strategies to account for current policy directions and shape strategic themes for this Strategy
- Consulting with stakeholders to identify current day and future strategic needs, issues, gaps, risks and opportunities
- Analysing and identifying strengths and endowments when considering the strategic objectives and opportunities
- Identifying strategies and actions that respond to the region's strategic economic development needs
- Actions and projects are assessed for Project Initiation and Planning

Appendix J – Action Plan

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Setting the Strategies to Realise the Vision

Each of the five Strategies are supported by an Action Plan – allocating an “owner” or sponsor of each Strategy and an expected timeframe in which to complete the actions.



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1. Develop the 'Engines of Growth' through Better Connections to External Markets

Strategic Context

The Northern Rivers is home to a diverse range of agricultural and manufacturing activities making the most of its rich natural endowments, mature supply chains and extensive capabilities. Sophisticated industry bodies see industry players advocate effectively for their collective interests and share knowledge and capability for the broader benefit of the Region.

A key remaining constraint on these 'Engines of Growth' is the quality of connections to external markets. High productivity truck configurations are not feasible on extensive sections of the Bruxner Highway and Summerland Way, and poor quality local roads in some highly productive agricultural areas. Addressing these constraints can improve the efficiency of the freight task, delineate freight and passenger movements, maximise benefits to northern NSW from Inland Rail and position the Region to make the most of burgeoning growth in demand in national and international markets for goods and produce.

Infrastructure Priorities

Investment programs for the Bruxner and Summerland Way corridor strategies and Fixing Country Roads candidate projects

Opportunities	Actions	Candidate Projects
<ul style="list-style-type: none"> • Improve the efficiency of freight movements within and beyond the Northern Rivers • Realise seamless 'farm gate to gateway' with supply chain connections to national global markets through a better integrated local and regional transport networks • Delineate freight and passenger movements where possible • Engage the private sector to provide industry insight when developing business cases • Improve road corridor productivity and safety. 	<ul style="list-style-type: none"> • Work with TfNSW to progress the Bruxner and Summerland Way corridor strategies • Develop program business cases: <ul style="list-style-type: none"> • for the Bruxner Highway west of Lismore • Summerland Way improvements to address b-double constraints beyond Kyogle • Work with TfNSW to identify initiatives to maximise benefits to Northern NSW from Inland Rail • Work with TfNSW and industry in reviewing regional freight forecasts to account for growth in Tabulam and other regions • Identify, cost and prioritise Fixing Country Roads 'last mile' candidate projects • Identify key localised congestion issues affecting regional transport and logistics routes and develop business cases for improvements. 	<ul style="list-style-type: none"> • Summerland Way realignment and upgrade program • Western Bruxner freight productivity program • Eastern Bruxner regional connectivity program • Kyogle Town Centre Bypass • Ballina-Byron Gateway Airport Stage Three • 'First Mile' / 'Last Mile' Fixing Country Roads Investment program • Bridge Upgrades: <ul style="list-style-type: none"> • Hollingworth Bridge • Duplication of Ballina Bridges • North Creek Bridge • Road Upgrades: <ul style="list-style-type: none"> • Oliver Avenue – Pineapple Road • Alternative route to Bruxner Highway • Alphadale Road • Union street – roundabout • Bruxner Highway/ Ballina Road interchange at Lismore • Pacific Highway - Ballina Bypass – Cumbalum Interchange.

Action Plan

Develop the 'Engines of Growth' through Better Connections to External Markets

Strategic Opportunities	Actions	Timeframe	Owner/s
<ul style="list-style-type: none"> Improve the efficiency of freight movements within and beyond the Northern Rivers Delineate freight and passenger movements where possible 	<ul style="list-style-type: none"> Work with TfNSW to progress the Bruxner and Summerland Way corridor strategies Develop program business cases: <ul style="list-style-type: none"> for the Bruxner Highway west of Lismore Summerland Way improvements to address b-double constraints beyond Kyogle 	December 2020	Kyogle Council Richmond Valley Council Lismore City Council
<ul style="list-style-type: none"> Realise seamless 'farm gate to gateway' connections to national global markets through a better integrated local and regional transport networks 	<ul style="list-style-type: none"> Work with TfNSW to identify initiatives to maximise benefits to Northern NSW from Inland Rail Identify, cost and prioritise Fixing Country Roads 'last mile' candidate projects 	June 2019	Kyogle Council Richmond Valley Council Lismore City Council
<ul style="list-style-type: none"> Engage the private sector to provide industry insight when developing business cases 	<ul style="list-style-type: none"> Work with TfNSW and industry in reviewing regional freight forecasts to account for growth in Tabulam and other regions 	June 2019	Kyogle Council
<ul style="list-style-type: none"> Improve road corridor productivity and safety. 	<ul style="list-style-type: none"> Identify key localised congestion issues affecting regional transport and logistics routes and develop business cases for improvements. 	December 2020	Ballina Shire Council Byron Shire Council Lismore City Council



2. Grow Tourism Opportunities Across the Region

Strategic Context

The Northern Rivers is Northern NSW's key tourism hub, with Byron Shire the most iconic tourist destination in the Region. The Region's appeal to visitors is largely focused on the combination of local culture and the tremendous beauty of its natural features, with millions of visitors drawn to its beaches, hinterlands and rainforests significantly contributing to the jobs and incomes of the Region's communities.

However, the Region's popularity with visitors is not without costs and challenges. The quality of transport infrastructure allows visitors to enter the Region relatively easily, but constraints on local roads impede the progress of visitors and locals alike. There is also the opportunity to diversify and disperse tourism activity across the Region to diminish the costs of congestion and increase benefits through longer lengths of stay. Priority measures should include upgrading Ewingsdale Road, advancing the Ballina Marina proposal, developing nature-based tourism opportunities beyond the coastline (especially in rainforest settings), using the power of its Aboriginal mythology and culture, and capitalising on food and agritourism opportunities.

Infrastructure Priorities

Ewingsdale Road upgrade program and Ballina Marina and sand bar works.

Opportunities	Actions	Candidate Projects
<ul style="list-style-type: none"> • Provide enabling infrastructure to expand tourism opportunities 	<ul style="list-style-type: none"> • Advance the business case for stage 1 of the Ewingsdale Road upgrade program (Byron bypass) 	<ul style="list-style-type: none"> • Ewingsdale Road upgrade program, including Byron Bay Town Centre bypass
<ul style="list-style-type: none"> • Improve road corridor productivity and safety 	<ul style="list-style-type: none"> • Develop a business case for Ballina Marina and sand bar works 	<ul style="list-style-type: none"> • Ballina Marina
<ul style="list-style-type: none"> • Support the development of whole-of-region branding for Northern Rivers products and experiences 	<ul style="list-style-type: none"> • Investigate opportunities to increase whole-of-region branding and marketing of products and services • Develop tourism opportunities in the Northern Rivers, focusing on coastal and inland World-Heritage sites, food and creative industries 	<ul style="list-style-type: none"> • Ballina sand bar works • Food Industry Hubs in the Northern Rivers • Northern Rivers Rail Trail • Bangalow Road (Byron) upgrade.

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Action Plan

Grow Tourism Opportunities Across the Region

Strategic Opportunities	Actions	Timeframe	Owner/s
<ul style="list-style-type: none"> • Provide enabling infrastructure to expand tourism opportunities 	<ul style="list-style-type: none"> • Advance the business case for stage 1 of the Ewingsdale Road upgrade program (Byron bypass) 	December 2018	Byron Shire Council
<ul style="list-style-type: none"> • Improve road corridor productivity and safety 	<ul style="list-style-type: none"> • Develop a business case for Ballina Marina and sand bar works 		Ballina Shire Council
<ul style="list-style-type: none"> • Support the development of whole-of-region branding for Northern Rivers products and experiences 	<ul style="list-style-type: none"> • Investigate opportunities to increase whole-of-region branding and marketing of products and services 	December 2019	Byron Shire Council
<ul style="list-style-type: none"> • Provide local training courses that are responsive to local industry needs 	<ul style="list-style-type: none"> • Develop tourism opportunities in the Northern Rivers, focusing on coastal and inland World-Heritage sites, food and creative industries 		Ballina Shire Council
			Kyogle Council



3. Foster the Development of Emerging Industries and Specialisations

Strategic Context

The Northern Rivers has a depth and diversity of economic activity close to unrivalled among the regions of NSW. Recent trends suggest these advantages are growing over time, with a range of emerging industries and activities beginning to flourish in the Region, supported by a range of institutions fostering business support and development. A particular trend of note is the significant increase in the number of 'creative professionals' (in fields like scientific research, specialised design, architecture, advertising, consulting and management) living in the Region, which increases the innovative potential of its businesses and connects them with expertise found in major capital cities and beyond.

The Northern Rivers can take a range of steps to better cultivate the development of its emerging industries. These include providing common use infrastructure, like an Innovation Hub, improving digital connectivity, supporting changes in land use and aligning education and training more closely with current and prospective industry needs.

Infrastructure Priorities

Byron Innovation and Entrepreneur Hub and digital infrastructure.

Opportunities

- Support the expansion and accessibility of offerings at Southern Cross University Lismore
- Provide local training courses that are responsive to local industry needs
- Facilitate the development of emerging clusters, specialisations and businesses
- Provide land use zoning and enabling infrastructure to activate land use change and allow increases in production
- Connect the people and businesses of the region to digital networks and technologies to a first-rate standard.

Actions

- Investigate opportunities to improve regional connectivity to the SCU campus
- Develop the Byron Innovation and Entrepreneur Hub
- Advocate for an innovation, entrepreneurial and enabling industry SkillsPoint in the Northern Rivers
- Extend the influence of business incubators to support small business development across the whole Region
- Work closely with RDA Northern Rivers and industry co-ops and associations to identify common use infrastructure investment and land use opportunities
- Investigate a Lismore renewable energy initiative
- Engage with NSW State Government to activate Crown Land that is identified in future land use strategies
- Develop a region-wide digital black spots map and identify rectification projects.

Candidate Projects

- Byron Innovation and Entrepreneur Hub
- Reynolds Road Casino Industrial Precinct
- Casino Industrial Activation power supply upgrade project
- Kyogle Creativity Hub
- Lismore CBD Highspeed Broadband
- Tabulam Agribusiness Precinct
- Southern Cross Industrial Precinct (Ballina)
- Lismore renewable energy initiative.

Action Plan

Foster the Development of Emerging Industries and Specialisations

Strategic Opportunity	Actions	Timeframe	Owner/s
<ul style="list-style-type: none"> Support the expansion and accessibility of offerings at Southern Cross University Lismore Provide local training courses that are responsive to local industry needs 	<ul style="list-style-type: none"> Investigate opportunities to improve regional connectivity to the SCU campus Advocate for a innovation, entrepreneurial and enabling industry SkillsPoint in the Northern Rivers 	June 2019	Lismore City Council Richmond Valley Council
<ul style="list-style-type: none"> Facilitate the development of emerging clusters, specialisations and businesses Provide land use zoning and enabling infrastructure to activate land use change and allow increases in production 	<ul style="list-style-type: none"> Develop the Byron Innovation and Entrepreneur Hub Work closely with RDA Northern Rivers, Local Government Associations, and industry co-ops and associations to identify common use infrastructure investment and land use opportunities Extend the influence of business incubators to support small business development across the whole Region Investigate a Lismore renewable energy initiative Engage with NSW State Government to activate Crown Land that is identified in future land use strategies. 	December 2019	All Councils
<ul style="list-style-type: none"> Connect the people and businesses of the Region to digital networks and technologies to a first rate standard 	<ul style="list-style-type: none"> Develop a region-wide digital black spots map and identify rectification projects. 	December 2019	All Councils



4. Grow the Population and Internal Markets of the Region

Strategic Context

The Northern Rivers has a large population compared to most of NSW regions, supporting sophisticated internal markets, high capability, economic diversity and specialisation in enabling and population serving activities. Large markets provide advantages of scale for producers, reinforced overtime by ongoing population growth.

The Northern Rivers has the opportunity to sustain this virtuous cycle of economic development, but it is not without challenges. Foremost among these issues is facilitating new housing supply, including provision of key enabling infrastructure and greater diversity in dwellings. Improved community infrastructure and services can also play a secondary role in ensuring population growth does not undermine living standards or quality of life for existing residents.

Infrastructure Priorities

A potential catalogue of infrastructure projects enabling new housing supply; community infrastructure.

Opportunities

- Accommodate growth in a manner that balances population pressures with infrastructure delivery to maintain the lifestyle character of the region
- Diversify the supply of housing types to meet the needs of the community
- Pursue new ways of celebrating indigenous and multicultural heritage
- Improve access to cultural, sporting and recreational facilities and services in the Northern Rivers

Actions

- Develop a regional catalogue of residential lands for activation and proactively seek funding opportunities for enabling infrastructure to accelerate housing supply
- Work with the Department of Planning to assess development feasibility of different housing choices across the Region
- Link targeted precinct planning outcomes to public transport, school transport and community transport requirements
- Undertake a region wide review of public transport, school transport and community transport to inform TfNSW reviews
- Develop an entertainment and convention centre proposal on a regional basis.

Candidate Projects

- Enabling infrastructure projects for the Housing Acceleration Fund
- Activation of residentially zoned Crown land
- Convention Centre
- Sewerage System Program – Kyogle villages
- Ballina Shire Road Network Strategy
- Regional public, school and community transport strategy
- Regional Sports Precinct

Action Plan

Grow the Population and Internal Markets of the Region

Strategic Opportunities	Actions	Timeframe	Owner/s
<ul style="list-style-type: none"> Accommodate growth in a manner that balances population pressures with infrastructure delivery to maintain the lifestyle character of the region Diversify the supply of housing types to meet the needs of the community 	<ul style="list-style-type: none"> Develop a regional catalogue of residential lands for activation and proactively seek funding opportunities for enabling infrastructure to accelerate housing supply Work with the Department of Planning to assess development feasibility of different housing choices across the Region 	June 2019	All Councils
<ul style="list-style-type: none"> Improve access to cultural, sporting and recreational facilities and services in the Northern Rivers Pursue new ways of celebrating indigenous and multicultural heritage 	<ul style="list-style-type: none"> Link targeted precinct planning outcomes to public transport, school transport and community transport requirements Undertake a Region wide review of public transport, school transport and community transport to inform TfNSW reviews Develop an entertainment and convention centre proposal on a regional basis. 	June 2020	Lismore City Council Ballina Shire Council Richmond Valley Council



5. Develop the Services Precincts of the Region through New Approaches to Partnership

Strategic Context

Lismore serves as the Region's services hub, with many customers or workers commuting significant distances to receive or provide its high-quality offerings.

Within Lismore, there are a number of distinctive precincts or clusters, including for health, education, retail, sporting and cultural facilities. Recognising the role these precincts play in the broader Region, Lismore City Council has demonstrated the leadership and foresight to implement a Partnerships Strategy that promotes collaboration across its own community, neighbouring councils and other institutions to help improve assets and services.

The opportunity for the Region is to extend the current Partnerships Strategy to the next level, accounting for whole-of-Region needs and opportunities and investigating new forms of partnership with the State and Federal Governments. This could include a City Deal, which has the potential to cut through the red tape of negotiating bilaterally with Government agencies to strike a holistic agreement for working together.

Infrastructure Priorities

Partnerships Strategy Investment Program, including a Central Growth Corridor Program for Lismore.

Opportunities

- Pursue current opportunities for new forms of partnership with the State and Federal Government
- Adopt a "customer focused" approach to regulating activities, not just delivering services
- Improve and integrate precincts through effective transport connections.

Actions

- Extend Lismore's Partnerships Strategy to a whole of region, intergovernmental basis
- Advocate for a Northern Rivers City Deal
- Work with the Department of Planning and Environment to undertake holistic precinct planning in Lismore and improve Regional precinct integration in alignment with the Central Growth Corridor Strategy
- Investigate potential harmonisation of cost and regulatory impositions
- Work with TfNSW to progress Future Transport plans for improve connectivity between Regional Cities and Centres, including public and community transport requirements and new bus and coach service improvements.

Candidate Projects

- Partnerships Strategy Investment Program, including a Central Growth Corridor Program
- Northern Rivers City Deal
- NSW and QLD cross-border comparative business cost study (undertaken jointly with Tweed Shire).

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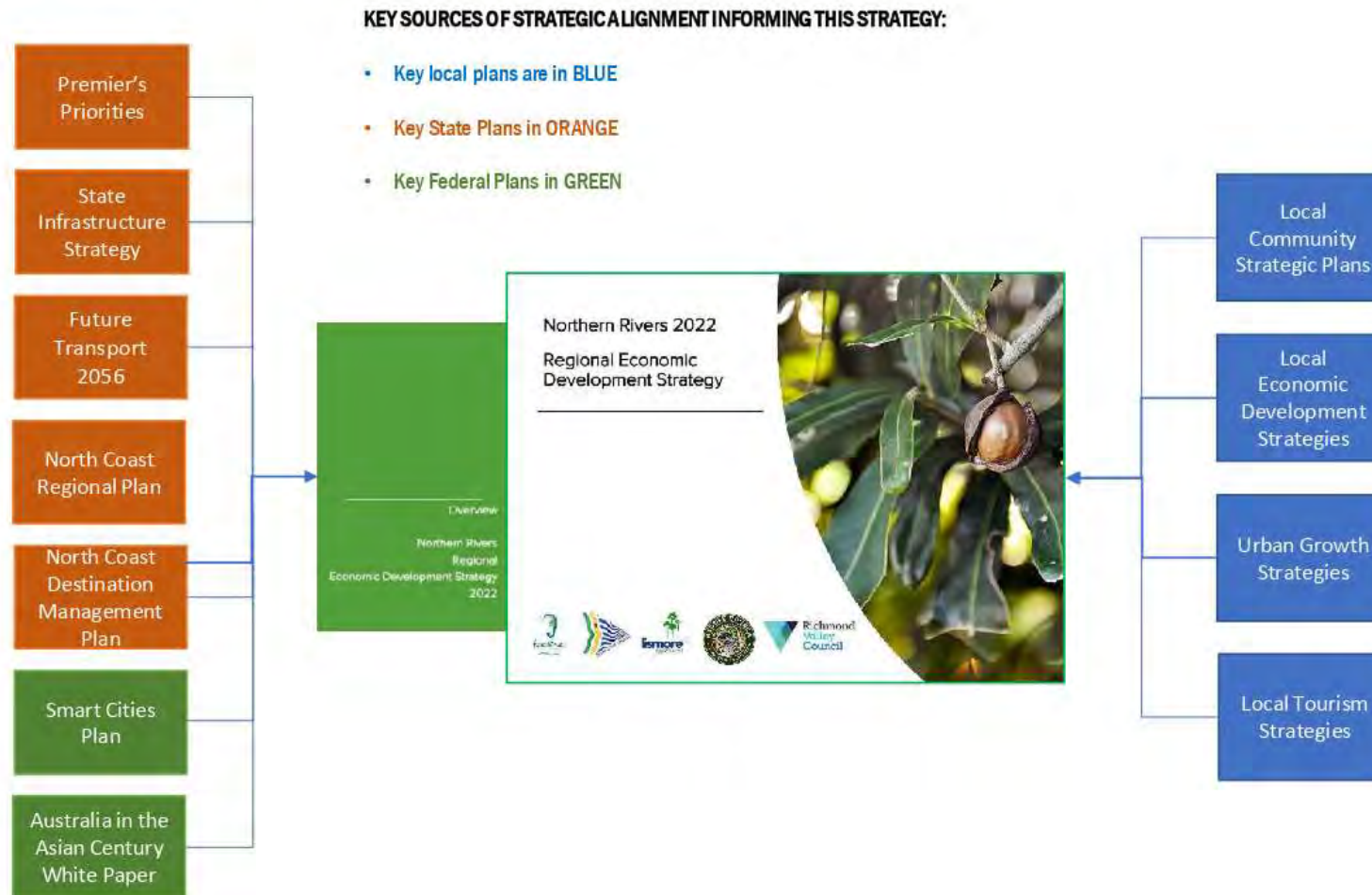
Action Plan

Develop the Services Precincts of the Region through New Approaches to Partnership

Strategic Opportunities	Actions	Timeframe	Owner/s
<ul style="list-style-type: none"> Pursue current opportunities for new forms of partnership with the State and Federal Government 	<ul style="list-style-type: none"> Extend Lismore's Partnerships Strategy to a whole of region, intergovernmental basis Advocate for a Northern Rivers City Deal Work with the Department of Planning and Environment to undertake holistic precinct planning in Lismore and improve Regional precinct integration in alignment with the Central Growth Corridor Strategy 	June 2019	All Councils
<ul style="list-style-type: none"> Adopt a "customer focused" approach to regulating activities, not just delivering services 	<ul style="list-style-type: none"> Investigate potential harmonisation of cost and regulatory impositions 	December 2019	All Councils
<ul style="list-style-type: none"> Improve and integrate precincts through effective transport connections. 	<ul style="list-style-type: none"> Work with TfNSW to progress Future Transport plans for improve connectivity between Regional Cities and Centres, including public and community transport requirements and new bus and coach service improvements. 	December 2019	Lismore City Council

Appendix K – Strategic Alignment

Strategic Alignment and Directions Drawn from Other Plans





Richmond
Valley
Council

