



Economic Development Strategy

2019-2023

Adopted August 2019

Our Vision

Working together to be a vibrant and prosperous rural community.



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Moira Shire Council adopted this strategy at its Council Meeting, 28 August 2019

Mayor's message

On behalf of Moira Shire Council I am excited to present our Economic Development Strategy 2019-2023.

Across our shire we enjoy an enviable mix of sun, soils and water. We also enjoy a diverse combination of towns, townships and rural lifestyles and locations with unique characters and strengths. From Bundalong to Barmah, Cobram to Kotupna, Ulupna to Yundool, these natural strengths underpin our diverse and innovative agriculture, tourism destinations and a lifestyle that is attractive to all.

The Economic Development Strategy is our road map for growing these opportunities across the Moira Shire, and in partnership with new and existing businesses, residents and stakeholders. It builds on the existing strengths of our local economy and embraces new opportunities that create diversity and resilience to enhance the shire's long-term economic, environmental and social sustainability.

In this strategy we commit to supporting future residential and business growth through our land use planning and by enabling and advocating for the water, energy, transport and digital infrastructure and services that our businesses and residents need.

We will continue Moira's long history of innovation and adaption. We will provide and support information sharing, learning and networking opportunities – and create an environment that is attractive to education institutions, start-ups and researchers wanting to explore existing and new opportunities.

Through tourism events, trails and promotion we will develop our tourism offer and encourage visitors to the region to enjoy all that our sun, soils, water and services make possible. At the same time we will continue to make Moira a great place to live by offering enviable year-round opportunities and entertainment.

The strategy maps an exciting future for the Moira Shire but it can only be delivered in partnership with business, community and stakeholders. For this reason we are grateful to the more than 100 business, community, tourism and stakeholder representatives who have shared their ideas as we have developed, tested and confirmed the strategy.

The next stage is implementation beginning with a plan to ensure we deliver the promises contained in this strategy over the next four years. As a council we look forward to continuing to work with our local community to build our exciting future together.



Cr. Libro Mustica
Mayor

Introduction

Moira Shire's Council Plan 2017-2020 guides Council's strategic direction, decision making and service delivery. The plan centres around four key strategies:

1. A great place to live
2. A thriving local economy
3. A clean green environment
4. A well run Council

To ensure Moira Shire retains a thriving, resilient economy into the future, Council has developed its Economic Development Strategy (EDS) 2019-2023.

This EDS builds on the existing strengths of the local economy while seeking to embrace new opportunities that create sustainable diversity and resilience.

Council will encourage existing businesses to become more sustainable. It will support development opportunities that enhance the Shire's long-term economic, environmental and social sustainability.

Locational advantages

Moira Shire is strategically positioned on the Murray River and major transport corridors two and a half hours north of Melbourne. The Shire's 4,045 square kilometres are bounded by the Murray, Goulburn and Ovens Rivers and comprise the four centres of Cobram, Nathalia, Numurkah and Yarrawonga, as well as eighteen small towns and communities each with their own characteristics, offerings and appeal.

Population growth

The Shire's population of 29,486 (2016) is projected to reach over 32,000 by 2031 based on in-migration of empty nesters and retirees, attracted by the Shire's climate, liveability and affordable housing.



Profile raising

Moira's residents take great pride in where they live and are passionate about their respective towns' culture and history. An over-arching theme of the draft strategy is to boost the profile of the Shire's towns and communities, by identifying and celebrating their individual characteristics, cultures and histories. They each have a distinctive role to play in the overall economic wellbeing of the broader Moira community.

Economic strengths

The economic strengths of Moira Shire are agricultural production, including intensive irrigation and broadacre cropping, associated food processing industries, horticulture, health, education, business services and tourism. Irrigated agriculture is the Shire's main economic driver and is inextricably linked to the region's modern irrigation network and secure high-quality surface and groundwater.

Competitive advantages

Moira Shire has an excellent opportunity to build on its competitive advantages, continue to diversify its economy, increase its resilience and attract families to the area. In addition to supporting its dairy and horticulture sectors, Moira's economy needs to transition to employment sectors that are less sensitive to water prices. The Shire has strong growth prospects for its retail trade, health and education sectors, specialised and high value-added tourism and new and emerging industries, including renewable energy generation.

Natural Environment

Council is committed to promoting and protecting the natural environment, one of the Shire's most significant assets, upon which much of our economy is dependent, as set out in Council's Environmental Sustainability Strategy 2017-2020.

Tourism opportunities

Tourism and recreation are largely generated by visitors' attraction to the Shire's significant environmental assets such, as the Murray, Goulburn and Ovens river systems, national parks and Ramsar listed wetlands. These natural assets are complemented by outstanding golf courses, quality accommodation and the many water based recreational activities available.

Connection opportunities

Reliable infrastructure, transport, energy and communications will be important for retaining and growing established industries and attracting new investment. Moira needs to leverage its position in proximity to major regional centres, capital cities and along major transport routes.

Diversity opportunities

Celebrating and growing the diversity of the Shire's towns and communities will strengthen its resilience - its ability to withstand stresses and shocks.



The strategy's five priorities

To capitalise on the Shire's strengths, advantages and opportunities outlined above, the Strategy has identified the following five priority areas:

- 1 **Priority 1: Enhancing infrastructure and land use**
- 2 **Priority 2: Providing information, learning and networking**
- 3 **Priority 3: Encouraging growth, innovation and diversification**
- 4 **Priority 4: Fostering the visitor economy**
- 5 **Priority 5: Making great places for people**

Undertaking a range of actions identified under each of these priorities will ensure the Shire's economy is vibrant and thriving:

- with increasing business investment, jobs, employee income and consumer spending
- more focussed on value-added production and less reliant on irrigation water
- well-endowed with infrastructure such as telecommunications, energy, and transport
- attractive to residents, visitors, workers, businesses, and entrepreneurs of all ages.

The role of local government in economic development

As a local government, Moira Shire Council contributes to economic development in several ways. While there are limitations in our ability to directly deliver business outcomes, we can facilitate and promote economic development within the context of our objectives, for example in planning, infrastructure and the environment. As such, we can influence the economy in line with our goals in other domains and support businesses by creating an environment conducive to economic activity.

Our toolkit includes:

- Planning to attract investment, support major projects and facilitate development
- Proactively supporting business applicants at various stages of permitting systems
- Facilitating engagement and networks to ensure businesses are supported and informed
- Marketing and promotion to highlight the Shire's strengths, raise its profile and reputation
- Raising awareness and supporting development of submissions to external funding sources
- Advocating for business in the community, Federal and State departments and agencies
- Leveraging relationships and partnerships with local, regional and community groups
- Supporting businesses to prepare for, respond to and recovering from, significant events.



Our economic development priorities:

Priority 1:
Enhancing infrastructure and land use

Priority 2:
Providing information, learning and networking

Economic development priorities

At the core of this draft strategy is an action framework presented under five thematic priorities.

- 1** Priority 1:
Enhancing infrastructure and land use
- 2** Priority 2:
Providing information, learning and networking
- 3** Priority 3:
Encouraging growth, innovation and diversification
- 4** Priority 4:
Fostering the visitor economy
- 5** Priority 5:
Making great places for people

The action framework outlined in this section comprises 42 existing and new actions under these priorities.

The priorities and actions have been identified as a response to the state of the economy (Appendix C), the megatrends expected to influence regional Australia (Appendix D) and a SWOT analysis of the Moira Shire Economy (Appendix E) and feedback received from the consultation period.



1 Priority 1: Enhancing infrastructure and land

Rationale

Access to infrastructure and appropriately developed land are fundamental for economic activity to prosper in Moira Shire. They create a platform on which Council can genuinely claim to businesses that the shire is ready for their investment. Businesses making locational decisions will assess areas for their infrastructure assets (e.g. electricity, gas, water, waste, transport, telecommunications and specialised supply-chain infrastructure). For businesses to set up or expand in the Shire, these assets, together with land, need to be available and ready for use. They also need to be cost-effective, modern and reliable.

Council can provide and manage some types of infrastructure, while Council can only advocate for other types of infrastructure that is provided by Federal, State or other agencies.

	Suggested actions	Start or Continue
1	Support industrial, commercial and residential land development opportunities (e.g. through targeted funds or joint ventures) that respond to the unique needs of each main town and other business activity areas.	Continue
2	Advocate for and support initiatives to increase the availability of water at lower cost to agriculture within the region.	Continue
3	Work with business and industry to deliver the Shire's strategic land use plans, including precinct plans, rezoning and specific projects.	Continue
4	Ensure investment in the upgrade of Council-managed road infrastructure is targeted and prioritised. Continue to advocate for enhancements to road and rail infrastructure managed by Victorian State agencies.	Continue
5	Identify priority infrastructure projects and ensure a proportion of these are 'shovel ready' in order to respond promptly to State and Federal infrastructure funding opportunities.	Continue
6	Explore ways to enable the development of a robust distributed energy system (e.g. solar and battery systems) to overcome prevailing electricity grid infrastructure constraints.	Continue
7	Identify candidate sites for business park development. Seek interest from developers to form development partnerships.	Start
8	Develop an infrastructure plan which maintains a clear understanding of infrastructure coverage and performance, in order to target identified deficits. Where feasible, develop a program of works to address deficits in key business activity areas (e.g. boosting signal strength and Wi-Fi coverage).	Start

2

Priority 2: Providing information, learning and networking

Rationale

A well-informed and innovative business sector enables a strong economy. Access to information, learning and networking opportunities can lead to industry adopt new technical, managerial or market possibilities. In turn, business growth and diversification become possible. In changing and challenging times, businesses need to apply good foresight and understanding of the factors that will impact business profitability.

Council is well-positioned to support business needs for information, learning and networking.

Suggested actions		Start or Continue
9	Convene meetings with businesses, Moira Shire management and Council, for periodic exchanges of views and knowledge.	Continue
10	Monitor and undertake research on the local economy and share findings and other information (e.g., tools, models, briefs, newsletters) with businesses.	Continue
11	Ensure Council itself is proactive and responsive in facilitating access to information relating to Council planning, permits and policy matters. Explore the establishment of a "concierge service" to assign a case officer to support businesses in their dealings with Council.	Continue
12	Explore the feasibility of new models of energy production and carbon offsetting including community owned solar and bioenergy facilities and carbon offsetting programs.	Continue
13	Identify and invite leaders and experts in rural economic development to the Shire to participate in business forums.	Continue
14	Refine and tailor our training support programs and the method of their delivery, to meet business needs more effectively.	Continue
15	Develop our program to showcase local business career opportunities to local school children.	Continue
15	Offer industry a study tour program (inbound and outbound) to raise awareness of innovative practices.	Start
17	Explore showcasing the Shire through a biennial business expo rotating between each of Moira's four main commercial centres.	Start

3

Priority 3: Encouraging growth, diversification and innovation

Rationale

Economic diversity builds resilience in an economy. When local economies are dependent on a small number of dominant sectors, (as is the case with the dairy industry's dominance of the Moira economy), they can be dragged down by a downturn in any one of those sectors. A diversified economy can better withstand sectoral downturns as retail and supporting industries (industries servicing other industries) are sustained by multiple dissociated sectors.

Diversification and innovation also have other benefits. Businesses substitute scarce and costly production inputs (such as irrigation water) and new 'cross-pollination' synergies are possible with different types of sectors.

Achieving this priority will involve promoting the uptake of new business models, identifying new market destinations, changing land and irrigation practices, and establishing the infrastructural foundations for new types of businesses to enter, or emerge within, the Shire.

Suggested actions		Start or Continue
18	Organise and host the biennial Business Excellence Awards to celebrate business excellence and innovation.	Continue
19	Support the aspirations of high growth local businesses by facilitating access to funding and business mentorship, and by highlighting their achievements through existing marketing and promotion channels.	Continue
20	Undertake a skills demand study in partnerships with neighbouring councils and build workforce capacity (with a focus on reskilling and transitioning to new industries) by reviewing and updating the curricula of existing Council supported adult-learning initiatives.	Continue
21	Work with business to showcase employment opportunities in the Shire to workers in Melbourne and major regional centres and introduce a "buddy" program to assist potential workers and their families to relocate and settle in the Shire.	Start
22	Invite selected outside businesses and post-secondary education institutions to Moira Shire to explore the potential to set up operations in the area.	Start
23	Use innovative methods such as open innovation competitions, hackathons and the release and external use of municipal data to address local economic and business development issues.	Start
24	Invite startups, vendors and researchers developing new agricultural and food processing technologies to showcase and trial their innovations within Moira Shire in collaboration with local businesses.	Start
25	Explore the feasibility of establishing a production facility that would act as a cooperative hub for value-added / artisan food producers.	Start

4 Priority 4: Fostering the visitor economy

Rationale

The Moira visitor economy refers to the production of goods and services for consumption by visitors. This includes industries that directly serve visitors, such as hotels, transport providers, tour companies and attractions, as well as intermediaries and those involved indirectly, such as retail and food production. Local residents also play a significant role through their connection to visiting friends and relatives, which represents a key purpose for visitors travelling to the region.

Tourism growth is dependent on attracting new visitors, extending their stay and evolving tourism products to meet the changing needs of existing and new target markets. To achieve this, we need to fill identified tourism infrastructure gaps and attract investment to diversify our tourism offer.

The Shire collaborates with the Sun Country on the Murray region, tourism and business groups, to raise awareness of our region as a tourism destination. Council is mid-way through its Visitor Services Strategy implementation that aims to deliver best practice visitor information services.

Council plays a significant role in supporting the visitor economy. Ease of access and use of facilities and infrastructure influence visitors' perception of a destination, their length of stay and overall satisfaction and ultimately the likelihood of repeat visits and word-of-mouth promotion

Suggested actions		Start or Continue
26	Implement the Visitor Services Strategy 2017-2019.	Continue
27	Implement the Recreational Vehicle Strategy.	Continue
28	Support existing events, and attract the Meetings, Incentives, Conferences and Events (MICE) market to the region.	Continue
29	Develop and implement a marketing plan to promote Moira Shire as a tourism destination.	Continue
30	Implement the Mid Eastern Murray Farm to Plate Cluster Plan actions.	Continue
31	Create an environment in which the hospitality and retail sectors are keen to extend their trading hours.	Continue
32	Work with and support the Tourism Advisory Committee and Local Tourism Associations to develop the Shire's profile and tourism offer.	Continue
33	Partner with the Murray Region to advocate for and lead develop of the region's tourism industry, the Murray River Adventure Trail, Ports of the Murray and other regional tourism projects.	Continue
34	Undertake research, including tourism research and mystery shopping to identify tourism infrastructure, product and service gaps and work proactively to bridge them.	Start
35	Develop and implement a clear and effective process that enables businesses to deliver events, with defined support from Council and other agencies.	Continue

5 Priority 5: Making great places for people

Rationale

Placemaking programs play a vital role in promoting economic development. Through such measures as civic beautification, the refurbishment and reconfiguration of spaces and public programming, Council can enhance the quality of place and therefore reinforce perceptions of liveability, a key attractor of residents, workers and businesses.

Placemaking interventions can be applied to streetscapes, open spaces and areas of aesthetic, urban or natural significance. They should build on each locality's unique assets and attributes to create experiences that are context-relevant, memorable and distinctive. They should highlight and promote the defining characteristics of the community and involve the community at all stages of design.

Suggested actions		Start or Continue
36	Enhance existing and develop new walking and cycling infrastructure within and between localities.	Continue
37	Develop, expand and enhance open spaces in urban areas (e.g. redevelopment of Cobram Piazza).	Continue
38	Work with hospitality and retailers to expand areas of footpath trading where feasible.	Start
39	Develop open-aired public spaces that can be adapted for events such as temporary markets, public talks, concerts, festivals and film screenings.	Start
40	Work with the community to clarify the nature and timing of events suitable for precincts within the Shire's major tourist features, such as Thompsons Beach and the Yarrowonga foreshore.	Start
41	Support public artwork in urban and rural areas (e.g. murals on silos).	Continue
42	Develop and implement an effective business signage and wayfinding policy for the Shire.	Start

The Next Steps

The next step will involve continuing to implement the 28 existing actions and starting the 14 new actions outlined under the five priority areas.

This will involve targeted consultation with relevant stakeholders to develop ideas and collaborative implementation methods.

Existing actions are currently funded within the 2019/20 budget.

Some new actions will require business cases to be presented to Council for approval and others will fall into the 2020/21 and subsequent budget periods for approval.

Success Measures

An annual assessment of the implementation of the Economic Development Strategy will be undertaken as follows.

Implementation of the Actions outlined in the Strategy will be measure by answering the following questions:

- Did we do what we said we would do? Yes/No
- If not, what did we do and why?
- Did the Action we took achieve the desired result.

The overall success of the Strategy will be based on an assessment of the above and the extent to which it contributed to an increased jobs and investment in Moira Shire.





Appendices

The following appendices provide context to the draft actions for the economic development strategy presented above.

- **Appendix A** outlines the strategy development process and timeline
- **Appendix B** explains why an economic development strategy is necessary
- **Appendix C** discusses the current state of the economy
- **Appendix D** identifies the issues that may impact the economy in the near future
- **Appendix E** outlines the Shire's strengths, weaknesses, opportunities and threats

Appendix A

Strategy development process and timeline

The creation of a new Economic Development Strategy is one of the main Council Plan 2017-2020 actions to ensure Moira Shire has “A thriving local economy”.

The Economic Development Strategy is being developed in three stages as follows:

1. Draft Strategy Preparation - September 2018 to May 2019
2. Draft Strategy Consultation - June to July 2019
3. Final Strategy Adoption - August 2019



Appendix B

Why have an economic development strategy?

A clear strategic direction is vital for Council to perform its role as an enabler of economic development. It is also important for strategic direction to be reappraised every few years to ensure the work being delivered by Council is appropriately responsive to current economic conditions. Moira Shire last put in place an economic development strategy in 2013 (The Business and Innovation Strategy 2013 – 2017) with an update of this strategy in 2014.

Since then, conditions and opportunities (such as the price of irrigation water and international trade patterns) have shifted to alter the economic landscape, necessitating a reappraisal of direction.

This strategy seeks to respond to these changes and provide clarity and direction with regards to the Shire's future economic development activities.

Strategy formulation is also an opportunity to listen to the voice of business and the broader community to understand expectations and inform the prioritisation of resources to the economy. Ongoing business and community input ensure the economic vision for the future is collective. The Council is an important contributor to economic development, but it is by no means the only one.



Appendix C Our existing economy



Population:
29,108

The Moira Shire resident population is rising, albeit at a slow rate - much like other areas in Northern Victoria.



Employment³:
10,913

736 jobs were added in the five-year period between 2011 and 2016. The fastest growing sector over this period was the Professional, Scientific and Technical Services sector, which increased job numbers by 42%.



Total output:
\$3.39 billion

There has been slight growth in output⁵ (or revenue) over recent years. Hume and Murray River regions have similar growth rates.



Regional exports:
\$1.23 billion

Manufacturing and Agriculture, Forestry and Fishing together comprise 84.65 percent of all Moira Shire exports.



Tourism jobs:
623

Tourism employs 5.7 percent of Moira Shire workforce. By comparison, tourism employs 8 percent of the Hume region workforce and 6.5 percent of the Murray River region workforce.



Per capita GRP¹:
\$52,127

Moira Shire GRP is \$1.517 Billion, or \$52,127 on a per capita basis. By comparison, the Hume (\$58,618) and Murray River (\$65,199) regions² have higher per capita GRPs.



Largest jobs sector:
Agriculture⁴

The sector called Agriculture, Forestry and Fishing employs 2,131 people or 22.68 percent of total Moira Shire employment – a far greater proportion than Hume and Murray River regions.



Largest sector:
Manufacturing

Manufacturing (mostly agriculturally derived) accounts for \$1.030 billion (or 30.4 per cent of total output) followed by Agriculture, Forestry and Fishing (\$586.35 million) and Construction (\$430.84 million). These are also the three largest sectors by output in the Hume and Murray River regions.



Broadband coverage:
65%

The National Broadband Network (NBN) has been rolled out to approximately 65% of the Moira Shire area. This coverage rate is similar to Hume and Murray River regions.



Tertiary educated:
13.5%

13.5 percent of the workforce are qualified to a Bachelor degree or above, compared with 34 percent of the workforce across Victoria.

Agriculture and agribusiness

Agriculture and agribusiness underpin the Moira Shire economy. Although the sector has experienced challenging conditions over the past decade, export opportunities are creating new markets and local investment. Moira Shire has strong agricultural foundations, and associated supporting infrastructure and services are key assets for future economic development.

Agricultural land use accounts for approximately 71 percent of the total land area, currently divided equally between irrigated and dry-land production.

The Shire is one of the largest milk-producing areas in Australia. The strength of the dairy sector supports other industries, such as agricultural services, transport and logistics, and manufacturing. It remains a significant jobs and income generator despite the recent and long-term trend of sectoral decline. Dairy product manufacturing accounts for 47.5 percent of the Shire's exports and 25.5 percent of its imports. It creates 842 direct manufacturing jobs and a turnover in excess of \$600 million.

Meat and other food processing (oils and fats, fruits and vegetables, wine) is also significant.

Producers in Moira Shire have started to capitalise on emerging opportunities in the niche food product sector, particularly through the exploration of new cropping industries, generating greater output from small land holdings (intensive farming), leveraging tourism assets, growing export markets and creating new branded and differentiated products.

Reduced water availability and affordability

Agribusiness in the Shire is being transformed by the need to become less reliant on water following water reforms that greatly reduced irrigation water availability and affordability.

Production models in agriculture, particularly dairy, are very sensitive to reductions in water. As a result, there have been changes to land use and property ownership patterns across the Shire, including property amalgamations, a transition to dry-land business opportunities and many farmers opting to leave the industry. Since 2007, farmers in the Goulburn Murray Irrigation District (of which Moira Shire is a part) have reduced their water ownership by 57 percent and are now highly reliant on the highly competitive, temporary water market.

The main drivers of water reductions have been the unbundling of water rights to land and the Federal Government's buy-back scheme to recover water for environmental flows. Expectations of further water recovery for the environment highlights the permanency of this issue.

Horticulture has a strong future in Moira Shire because of its water-effectiveness. Dairy is more challenged because of its relatively high water use although improved water efficiency and less pasture-based production may improve outcomes in the longer term.

Given the significance of the dairy sector to the Moira Shire economy, water reforms and the changes it has triggered will have wide ranging consequences for the whole economy.

◀ Notes to infographic

1. GRP, or the Gross Regional Product, is a measure of wealth generated in the region.
2. The Hume and Murray River regions are useful benchmarking regions to put figures and growth rates of the Moira Shire economy into context. The Hume region comprises Moira Shire and 11 other local government areas to the south and west of Moira Shire. The Murray River region comprises Moira Shire and the 14 other Victorian and New South Wales local government areas bordering the Murray River.
3. This figure represents full time and part time employment
4. The sectoral categories presented above are defined by the Australian Bureau of Statistics (ABS), the source for data on the Moira Shire economy. Throughout the rest of this paper, we refer to agriculture and agribusiness rather than ABS's composite category Agriculture, Forestry & Fishing. Agriculture is used to describe the primary land-based activities in the production of food and fibre. It includes the production of milk, fruit, vegetables, livestock, poultry and eggs, feedstock, fibre and oils. Agribusiness is used to describe agriculture together with agricultural servicing industries along the supply chain. It can therefore include activities such as manufacturing if it relates to the processing of agricultural products.
5. Output data represents the gross revenue generated by businesses/organisations in each of the industry sectors in a defined region. Gross revenue is also referred to as total sales or total income.

Other sectors

Tourism is an important sector to Moira Shire in terms of economic output and job creation. It generates \$101 million of economic output (3.7 per cent of Moira Shire's total of \$2.7 billion) and employs 623 people or 5.7 percent of Moira Shire workforce. By comparison, 8 percent of the Hume region workforce and 6.5 percent of the Murray River region workforce are employed in tourism.

Effective visitor services can positively influence visitor behaviour in terms of increasing the visitor's length of stay and expenditure, and motivating visitors to re-visit and recommend the destination to others. Visitor services (such as information centres, signage and marketing) therefore play a vital role for Council.

Health and Social Services recorded strong employment growth over the past census period (2011 -2016) as a result of an ageing population and an influx of retirees to the area. This is expected to continue over the coming years as aged care providers are expanding operations. A trend in the aged care sector towards independent living may also provide opportunities for growth.

The retail sector is predominantly based in Moira Shire's four medium sized towns, and aimed at servicing residents, surrounding rural catchments, and tourist markets. Higher order retail shopping is accessed in the nearby major centres of Shepparton, Wangaratta, Albury/Wodonga and Echuca/Moama.

The future growth of this sector is expected to continue in line with population and tourism growth. Some opportunities include:

- The strategic location of retail along major transport routes;
- A growing tourism market and the renewal of the town centres leveraging more boutique retail and hospitality, and growth of the events and conferences market;
- Major national retailers entering Yarrawonga in response to its population growth.

The workforce

The defining characteristics of Moira's workforce are its aging demographic and the misalignment between existing skills and the skills required for the jobs of the future. These issues are common across regional Australia and indeed elsewhere across the developed world. They have arisen largely due to the loss of young residents and workers to Melbourne and other large regional centres to pursue employment and education opportunities, and the significant challenges in attracting highly skilled workers to the region. Today, only 31 percent of the workforce is aged 34 or younger compared with 38 percent nationally.

There is a critical need to upskill workers to replace an ageing workforce, keep pace with technology advancements, support higher value-added products, and leverage emerging agribusiness opportunities. Addressing workforce gaps and issues will require a sustained effort across industry, government authorities at all levels, and education providers. Currently there are limited tertiary education opportunities in Moira Shire, with the nearest institutions located in Wangaratta and Shepparton. Council should be pro-active in engaging with industry and regional education providers to understand local workforce issues and the education and training initiatives required to bridge the skills gaps. The Hume Regional Development Plan provides a regional approach and action plan.

Other points to note of the Moira workforce are the facts that:

- The three most prevalent occupation types are Managers (20 percent of the Moira workforce) Labourers (19 percent) and Technician and Trades Workers (13 per cent);
- 75 percent of the workforce reside in Moira Shire; and
- 13.5 percent of the workforce are qualified to a Bachelor degree or above, compared with 34 percent of the workforce across Victoria.

Appendix D

The future

Rural Victoria's economy is constantly changing. Climate variability, water security, low population growth and changes to agribusiness employment have become challenging issues. For our Economic Development Strategy to have a positive impact on Moira's economy, we need to understand these changes and identify what can and cannot be influenced.

Megatrends impacting regional Australia

A recent CSIRO report Strategic foresight for regional Australia (2017) identified five megatrends that are impacting regional areas such as Moira Shire. These trends have been observed in recent years and are expected to continue into the foreseeable future.

Megatrend 1: Defeating distance

Overcoming long distances has shaped development in the regions and continues to be a major influence on the way people live and work in regions, and on the performance of regional businesses. Notable trends include:

- Residents making locational decisions on an array of amenity-related factors rather than solely on the location of employment opportunities
- A more mobile workforce and improvements to workforce flexibility, such as work-from-home options, telecommuting and co-working
- Cheaper and faster transportation of goods
- Enhanced communications through wider and better internet and mobile connections and the prevalence of social media
- A lessening of the digital divide (though digital literacy and access in regional areas still lag urban areas).

Megatrend 2: Global exposure

Global markets will continue to shape economic activity in Australia's regions as communities and businesses become increasingly exposed economically and culturally. Notable trends include:

- Asia as the primary destination and source of exports and imports
- Growth in demand from Asia for higher value food categories such as fresh fruit and vegetables, protein sources and processed foods
- Growth in capital investment from overseas in areas including, agricultural properties and processing facilities, energy, water, telecommunications and other infrastructure
- Environmental consciousness and a need for producers to demonstrate "sustainability credentials" to gain access to international markets
- International migrants and temporary workers preferring to settle in urban areas and only being drawn to regions for employment, particularly if enticed through various visa schemes
- A greater number of inbound passenger movements to Australia.

Megatrend 3: Diverging places

Regional and urban areas continue to diverge with respect to community values, household income and other attributes. Notable trends include:

- • Long-term population flows favouring cities over rural areas due to centralisation forces with some counter-centralisation coming from retirees and other cohorts seeking to benefit from lifestyle and housing cost advantages of rural areas.
- Migration flows to areas with high natural and social amenity and reputation for liveability
- An ageing demographic caused by increases in life expectancy and declining birth rates
- Rising income and wealth inequality within regions and between urban and rural areas
- A shift from government to governance - the tendency for an increasing number of non-government stakeholders to be involved in what might previously have been considered 'public' decision-making and discussion.
- Rise of localisation as a counter-trend to globalisation and a result of mistrust in distant decision makers
- Greater rates of turnover of property ownership – particularly agricultural property

Megatrend 4: New economies

The Australian economy, like other economies globally, is in transition. Two major aspects of the transition are the generation of value through knowledge, innovation, and new services; and the changing mix of energy demand and sources of energy generation. Notable trends include:

- An increasing contribution to Australia’s economy by service industries, in particular by four broad groups of enabling services: professional and support services; ICT and the digital economy; trade, transport and logistics; and utilities services
- Increased viability of biofuels and renewables due to cost reductions and improvements in technology – especially in solar generation and battery storage
- Self-generation of electricity (getting off grid) in houses, communities and entire towns by using improved solar technologies
- Growth in supply of natural gas
- A rise in organisations employing digital collaboration, regional hubs and co-working arrangements for employee and business-to-business interaction
- Prevalence of automation and un-crewed vehicles; computers and robotics replacing labour in routine, remote, dirty or dangerous work environments
- Demand and policy settings that support carbon farming and other emerging ecosystem service-based markets.

Megatrend 5: Environment as risk

Regional Australia’s communities and businesses have long known the environment as a source of both livelihood and risk. However, a range of risks are presenting new or expanded challenges. Notable trends include:

- Increases in extreme weather events and irregular rainfall patterns induced by climate change
- Pressure on biodiversity and the condition of natural assets
- Biosecurity maintenance increasingly pressured by greater international movement of people and products
- More vulnerability in cybersecurity systems due to greater connectedness and complexity of information technology networks
- Geopolitical instability in isolated instances countering the dominant trend of greater cooperation between countries
- New technologies such as cloud computing, remote and proximate sensing, and predictive and big data analytics are improving decision-support and modelling capabilities in the public and private sectors.

Appendix E

Moira Shire’s strengths, weaknesses, threats and opportunities

STRENGTHS

- Community support for economic development
- Close to South Central New South Wales, Melbourne and the major regional centres of Shepparton, Albury/Wodonga, Wangaratta and Echuca/Moama
- An established and renowned agribusiness sector comprising suitable topography, soils and climate, and advanced irrigation infrastructure
- High lifestyle appeal including a comfortable ‘Mediterranean-like’ climate, recreational and natural assets, and good health services and schools
- Low cost land, property and housing
- An established tourism sector based around golf, the Murray River, Barmah National Park, Lake Mulwala, inland beaches and walking trails
- Strong growth prospects for new and emerging industries including alternative energy generation, specialised and high value-added food products and food-focussed tourism

OPPORTUNITIES

- Promote the individuality of the towns (e.g. their built form, their unique micro-economies and culture) to highlight points of difference and provide a greater regional offer
- Support food-based and business tourism as well as continued growth of recreational and ecotourism
- Expand the value-added activities associated with existing industries, especially within agribusiness
- Exploit grant funding opportunities at the state and federal level
- Promote the Shire as a testbed for innovation in irrigation, recycling and renewable energy particularly in an agricultural context
- Enhance transport infrastructure
- Zone land for industrial, commercial and residential activity and facilitate its development where there has been clear market failure
- Activate new partnership models to support economic development, including with the community and surrounding Shire councils
- Establish deeper links between the visitor economy and the indigenous community
- Promote employment pathways to local school-aged children, and attract young people back to the Shire following completion of tertiary education
- Encourage new forms of public and shared transport to increase journey-to-work choices, and explore opportunities to enable workers and students to ‘virtually commute’

An analysis of the strengths, weaknesses, threats and opportunities (SWOT) facing the Moira Shire economy today and into the near future is an important prerequisite to the development of an economic development strategy. The strategy will need to build on existing strengths, address and mitigate weaknesses and threats, and exploit opportunities.

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|---|--|------------|
| <ul style="list-style-type: none"> – A lack of economic diversity with a concentration on water dependent industries – The low profile of Moira's attractiveness and many of its assets, outside the region – A small labour and professional pool for select industries and a lack of policy initiatives to encourage attainment of skills required in the future – A lack of venues for meetings, conferences and events – A constrained retail sector due to a small and dispersed population and proximity to major centres in neighbouring areas – Substandard broadband coverage, performance and reliability | <ul style="list-style-type: none"> – Supply constraints for gas, electricity and waste water treatment – A lack of readily available zoned and aserved land for industry (and for commercial uses in Numurkah and Nathalia) – An ageing population and the flight of youth – A substandard road system in terms of connectivity, condition, and capacity – Inadequate facilities for freight and logistics – Poor public transport connectivity within and beyond the Shire restricting journey to work choices and access to some services. | WEAKNESSES |
|---|--|------------|

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| <ul style="list-style-type: none"> – Adverse weather patterns due to climate change – Natural events such as cyclones and blue green algae outbreaks – Further reductions to the availability and/or affordability of irrigation water placing increased pressure on the viability of agriculture – Increasing energy costs – Prolonged inadequacy of digital and communications infrastructure – Cost and price competitiveness of foreign producers, especially in food production – Local government areas near Moira Shire with competing investment attraction strategies | <ul style="list-style-type: none"> – A volatile global economy and/or an Australian recession reducing investment and demand for Moira goods and services – A reluctance and inability of some existing industries to adapt, innovate and be entrepreneurial, due to increasing red-tape, knowledge deficits, lack of capital and/or risk aversion – Potential conflict of land uses, increased congestion with heavy vehicles, industry, tourism and residential areas – An aging population with substandard facilities and services – A disengaged young population with limited local employment opportunities – Ongoing degradation of our natural environment | THREATS |
|---|---|---------|

Appendix F

Information sources

Preparation of the draft strategy incorporates a synthesis of findings from the following documents, reports, strategies conferences and workshops.

Internal documents

- Moira Shire Economic Analysis (Urban Enterprise 2016)
- Yarrawonga Growth Management Strategy (MacroPlan 2016)
- Analysis and Feasibility Study on Industrial Land at Nathalia and Numurkah (Spade Consultants 2011)
- Retail Policy Framework for Cobram and Yarrawonga: Background Analysis (SED Consulting 2017)
- Retail Policy Framework for Cobram and Yarrawonga: Options Report (SED Consulting 2017)
- Numurkah Economic Development Plan (Spade Consultants 2016)
- Remplan consultants, 2019: Moira Sire Gap Analysis

External documents

- Moira Shire Council Plan 2017-2020
- Moira Shire Annual Reports, 2013/14 to 2017/18
- Moira Shire Business and Innovation Strategy 2014-2017
- Moira Shire Environmental Sustainability Strategy 2017-2021
- Remplan consultants, 2019: Moira Sire Population and Employment Forecasts, Economic Profile: www.economyprofile.com.au/moira and www.moira.vic.gov.au
- Hume Regional Growth Plan
- Future Focus, Dairy Industry Strategy Murray Region 2019
- Major Towns' Strategy Plan Review - Yarrawonga, Cobram, Numurkah and Nathalia. Yarrawonga Growth Management Strategy, MacroPlan 2016
- The Murray Regional Economic Development Strategy 2018-2022 (The Balmoral Group 2018)
- Trends Impacting Regional Australia (CSIRO 2017)
- The Role of Local Government in Local and Regional Economic Development (University of Technology Sydney 2017)
- Economic Development Strategies of Greater Shepparton, Wangaratta, Indigo, Federation, Campaspe, Berrigan and Corowa Shire Councils.

Conferences and workshops

- SEGRA 2018
- Hume Economic Development Network
- North Central Dry Seasons Conditions Coordination Group
- Goulburn Murray Region Workshop
- RDV & DEDJTR meetings
- Rural Councils Victoria - Goulburn Investment Attraction Program workshop
- Dairy Australia 2018 Outlook breakfast

In addition to the above, the draft Strategy included:

- 30 individual and collective structured-interviews with Moira Shire Councillors, managers and staff
- 20 individual and collective structured-interviews with members of the Moira Shire's five Business and Tourism Advisory Committees and key stakeholders

In preparation of the Moira Shire Economic Analysis report 2016, the Urban Enterprise consultant's consultation program included:

- business workshops within each of Moira's four major towns
- discussions with regional and state authorities
- over 30 one-on-one interviews with businesses and stakeholders which represent the key economic sectors in Moira; and
- an online survey of Moira's business community, in February and March 2016. A total of 51 survey responses were obtained.

Community feedback was sought on the draft Economic Development Strategy over four weeks from 1 July to 26 July 2019 promoted via:

Communication/Advertising

- Corporate ads - 3 July, 17 July 2019
- Media release – 5 July 2019
- Councillor news – 5 July, 12 July, 19 July, 26 July 2019
- Facebook post – 3 July 2019
- Corporate ad – 17 July 2019
- Staff newsletters – 4 July, 18 July 2019

Five Feedback Sessions

- Katamatite, Katamatite Recreation Reserve, 17 July 2019
- Cobram, Visitor Information Centre, Friday 19 July 2019
- Yarrawonga, Visitor Information Centre, Friday 19 July 2019
- Nathalia, Barmah Forest Heritage & Education Centre, Thursday 18 July 2019
- Numurkah, Visitor Information Centre Thursday, 18 July 2019

Direct emails to:

- 150 Economic Development businesses contacts
- Hume Economic Development Group
- The Moira Shire Tourism Advisory Committee and four Local Tourism and Business Associations.

Council received ten written submissions and nine individuals attended feedback sessions.

Overall the feedback was very positive and only minor changes to the Economic Development Strategy have been made to accommodate these.

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Cover image:

Greenhouse at Katunga Fresh, Katunga



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