

# Albury

## Economic Development Strategy 2023 - 2027: Discussion Paper





# AlburyCity Economic Development Strategy 2023 - 2027 – Discussion Paper

This project has been conducted by REMPLAN on behalf of AlburyCity Council.

November 2022

## Acknowledgement of Country

AlburyCity acknowledges the Wiradjuri people as the traditional custodians of the land in which we live and work and we pay our respects to Elders past, present and future for they hold the memories, culture, tradition and hopes of Aboriginal and Torres Strait Islander people that contribute to our community.

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# Executive Summary

Covid recovery continues, as do supply chain disruptions now compounded by geopolitical tensions. Costs of living pressures are growing due to rising costs, inflation, and continued housing affordability issues intensified by increasing interest rates.

While the great move to the regions has delivered benefit to regional areas, the rapid growth in population comes with its challenges.

Local government plays an important role in undertaking a range of activities to promote and protect the interests of the community and underpin business growth, employment, and training opportunities.

AlburyCity has commenced development of an economic development strategy to guide Council priorities and to help create a sustainable, prosperous future for the local community.

With its foundations in community engagement, the Albury Economic Development Strategy will establish a vision, outline objectives for economic development, and detail a range of actions to implement those objectives over the next five years (2023 to 2027).

Based on a review of key documents, and engagement undertaken to date eight emerging themes have been identified. These themes are intended to frame discussion around key drivers of the economy, actions that could be developed, or issues that if addressed could unlock new opportunities.



Opportunity for all



Liveability



Brand Albury Wodonga



Sustainable economic growth



Environment & natural assets



Partnership & collaboration



Leadership & innovation



Regional Hub



## **Economic Development Strategy (EDS) Discussion Paper Introduction**

## Project Overview

Local economic development aims to increase the economic capacity of a local area and, in turn, improve the wellbeing of local communities. An economic development strategy provides a framework for the future growth and prosperity of a particular region.

The previous Economic Development Strategy for AlburyCity was created for the period 2012-2015. Since that time there have been significant changes in the local economy. The AlburyCity Economic Development Strategy (The EDS) will establish priorities for the coming five years that will help create a sustainable, prosperous future for everyone in the Albury community.

AlburyCity's 'What We've Heard report' compiled the outcomes of stakeholder engagement undertaken as part of other AlburyCity strategies and projects. This provided the contextual analysis of local views, ideas, and issues in relation to the local economy and has been used as a basis for this report.

## Role and Scope of the EDS Discussion Paper

This document identifies a range of issues and opportunities relevant to the future of the Albury City local government area and seeks to provide a strong platform on which Council and the community can move forward in the development and implementation of the final strategy.

Building on a range of research and engagement already undertaken and summarised in the 'What We've Heard report', this discussion paper:

- articulates the role of the EDS in relation to AlburyCity's existing strategic framework,
- provides an evidence base of identified issues and frames discussion around how those issues relate to economic development,
- identifies key regional assets, vulnerabilities and opportunities related to these issues to guide future direction for Albury,
- distils a range of actions previously identified by the community and aligns them to address the issues, and
- prompts and guides community conversation to ensure stakeholder engagement is undertaken in a robust manner in turn ensuring the EDS best reflects the priorities and aspirations of the local community.

### *Economic Development Strategy project stages*





### Alignment with Community Strategic Plan

The Integrated Planning and Reporting Framework begins with the community's, not councils, aspirations.

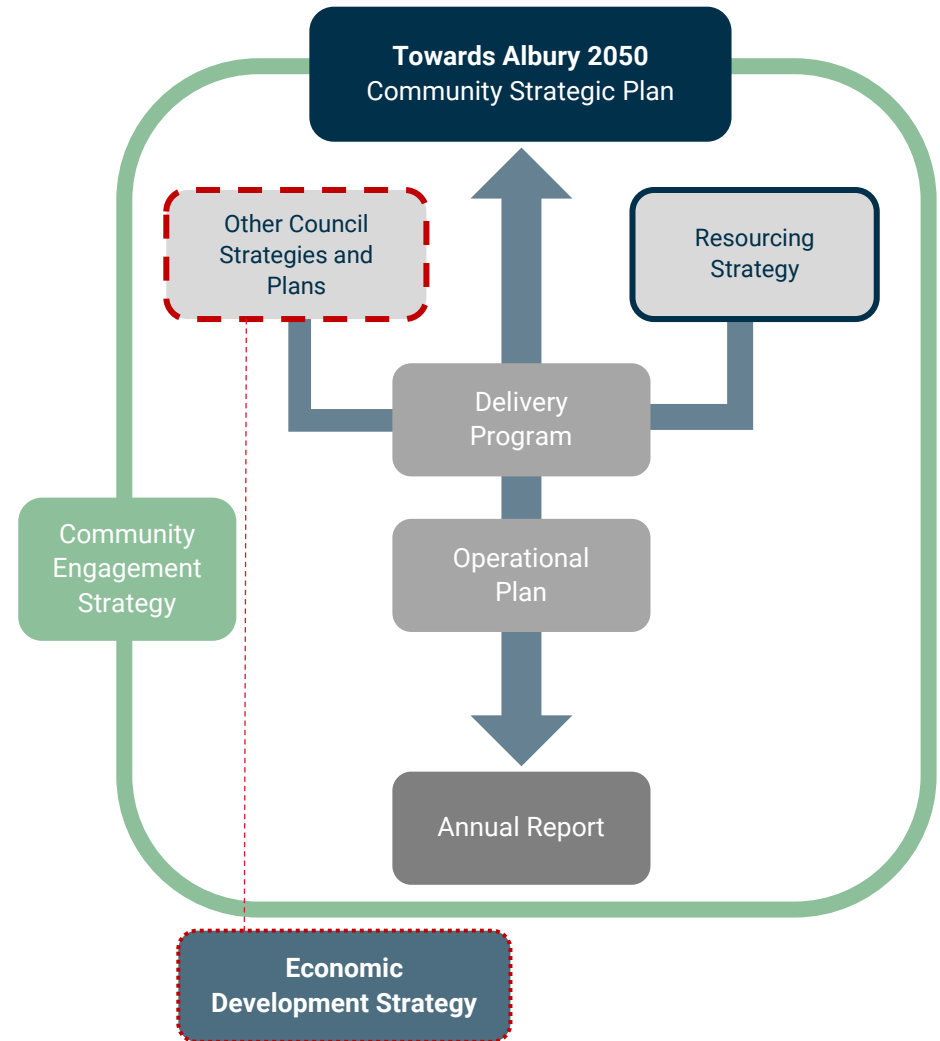
**Towards Albury 2050** was developed based on the aspirations and priorities of our community and defines the future vision for Albury towards 2050. While Council will play a leading role in facilitating and delivering some of the aspirations in the plan, others will be driven by individuals, groups and government agencies – all with the aim of ensuring a whole-of-community approach to developing the Albury of the future.

Towards Albury 2050 provides a long-term approach and plan for the future of the community with a focus on four themes:

- A Growing Sustainable Economy.
- An Enhanced Natural Environment.
- A Caring Community.
- A Leading Community.

The EDS builds on the direction set by the community strategic plan and will encompass all four themes, with a particular focus on growing a sustainable economy.

*AlburyCity Integrated Planning and Reporting Framework*



## United Nations Sustainable Development Goals

In 2015, 193 countries, including Australia, unanimously agreed to the Sustainable Development Goals in the 2030 Agenda for Sustainable Development which integrates social, economic, and environmental dimensions of sustainable development.

AlburyCity has taken the initiative to commit to a more sustainable approach to achieving economic prosperity.

Development of AlburyCity's EDS will incorporate the following relevant sustainable development goals. Aspects of these goals are incorporated into identified themes.

### United Nations Sustainability Development Goals Relevant to Albury EDS

**8** DECENT WORK AND  
ECONOMIC GROWTH



#### DECENT WORK AND ECONOMIC GROWTH

Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all

**9** INDUSTRY, INNOVATION  
AND INFRASTRUCTURE



#### INDUSTRY, INNOVATION AND INFRASTRUCTURE

Build resilient infrastructure, promote inclusive and sustainable industrialisation and foster innovation

**11** SUSTAINABLE CITIES  
AND COMMUNITIES



#### SUSTAINABLE CITIES AND COMMUNITIES

Make cities and human settlements inclusive, safe, resilient and sustainable

**12** RESPONSIBLE  
CONSUMPTION  
AND PRODUCTION



#### RESPONSIBLE CONSUMPTION AND PRODUCTION

Ensure sustainable consumption and production patterns

**13** CLIMATE  
ACTION



#### CLIMATE ACTION

Take urgent action to combat climate change and its impacts

**17** PARTNERSHIPS  
FOR THE GOALS



#### PARTNERSHIPS FOR THE GOALS

Strengthen the means of implementation and revitalize the global partnership for sustainable development



### Role and Responsibility of Council

The Federal and State Governments play significant roles in progressing economic development initiatives at broader regional and national scales. Local government plays an equally important role at the local level, undertaking a range of activities and initiatives in collaboration with local partners to promote the interests of the region and underpin business growth, employment, and training opportunities.

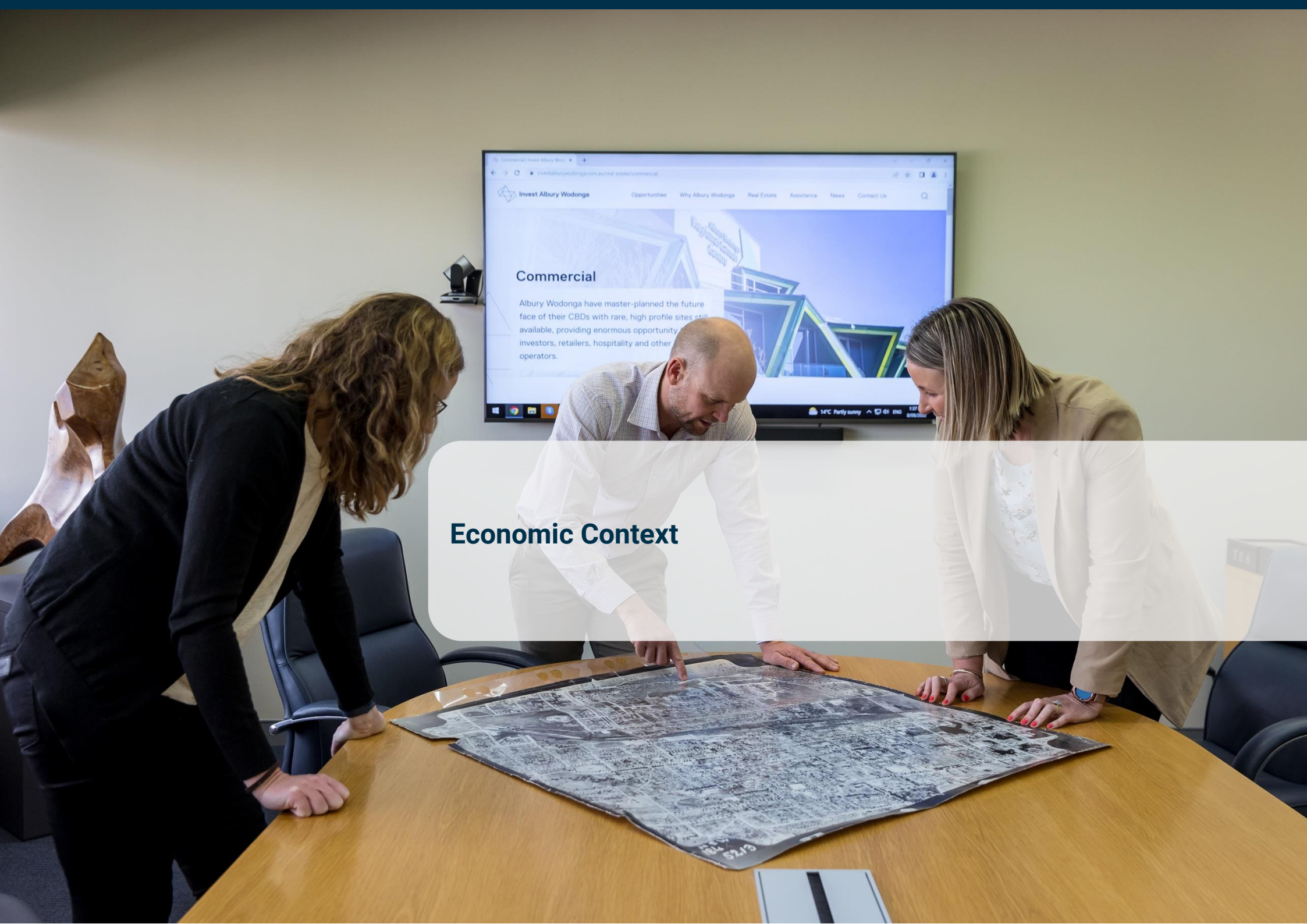
Businesses are ultimately the ones that drive and deliver economic development through investment, business growth and local employment. As a large local organisation, AlburyCity can play a similar role to business through its operations. However, local government's key role in economic development is delivered through its core economic development functions.

Work within the control of Council includes investment attraction and business development, infrastructure projects, land development, strategic planning, localised data provision, marketing and advocacy.

Local Government has an important role to play by creating suitable conditions for positive economic development outcomes, by identifying and pursuing local competitive advantages, providing long term planning, collecting, analysing and distributing local data and information, partnering with business and key stakeholders for growth, and advocating to remove barriers.

*Local government roles and responsibilities*





## Economic Context

## Economic Performance

The City of Albury is a modern, vibrant city servicing the wider region as the major retail, commercial, administrative, health, education and cultural centre. Located at the centre of the Sydney-Melbourne-Adelaide triangle, Albury is recognised as a leading regional centre with a positive outlook for growth, investment, and employment. Albury is part of the larger Albury Wodonga region, functioning as a single community that spans the border between New South Wales and Victoria.

Albury's gross regional product (GRP) is estimated at \$4.1 billion having contracted 1% in real terms over 2021, this contraction followed a period of sustained growth.

While there has been a distinct shift in industry contribution to GRP (i.e., industry value-added), the primary drivers of economic growth have remained the same. Rental and real estate, health care, public admin services, construction, manufacturing, and retail trade continue to generate the highest marginal economic value within Albury.

Between 2012 and 2021 the marginal economic value generated by local rental and real estate services, health care, public administration, construction and education either doubled or close to doubled (Figure 2), with the combined increase in value-added by those five industries contributing close to an additional \$1 billion in value-added.

Figure 1. Economic growth, Albury

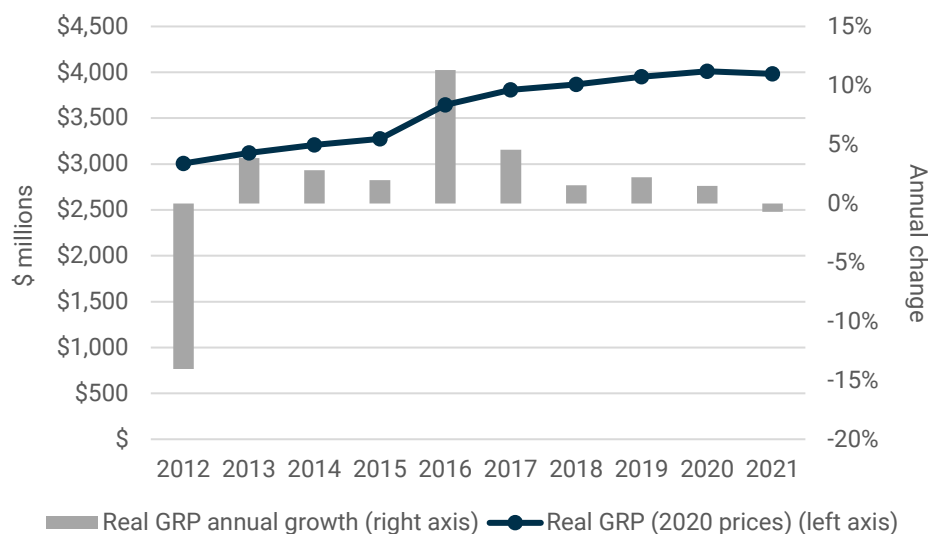
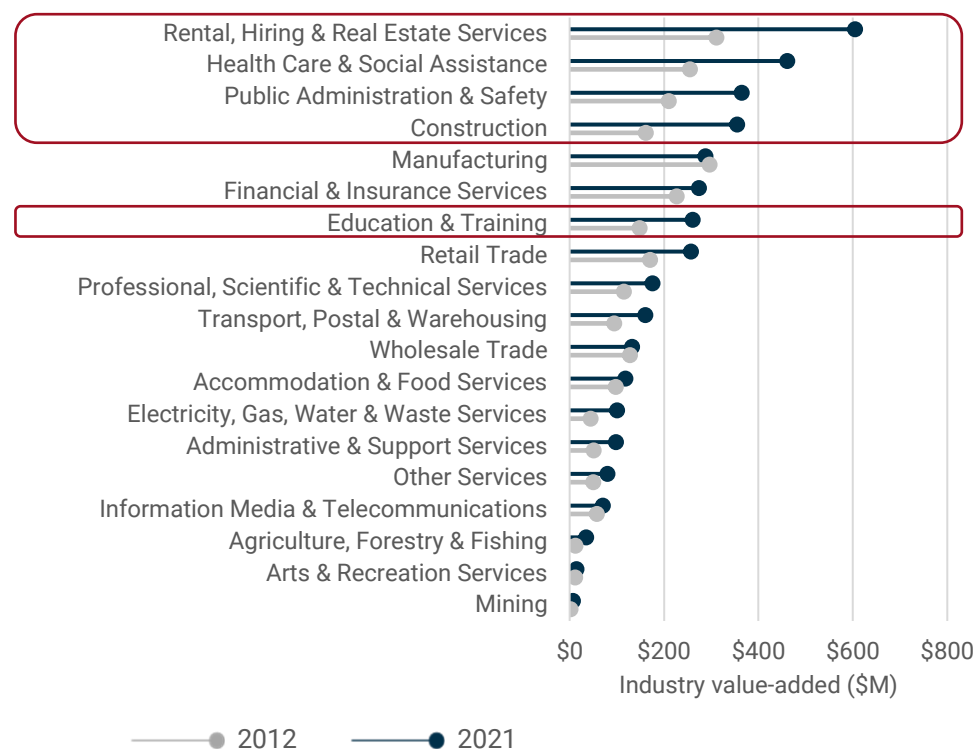


Figure 2. Industry drivers of economic growth, Albury





### Albury Wodonga Regional Deal

Established in 2020 the Albury Wodonga Regional Deal (Regional Deal) brings together three levels of government to harness local opportunities and strengths for the benefit of the community and local business.

Through a process of consultation with community and the local business sector the Federal and local governments identified a range of funding opportunities that will benefit the community.

To date funding commitments have included \$80 million from the Australian Government, \$38 million from AlburyCity and \$12 million from Wodonga.

#### *Albury Wodonga Regional Deal Investment Commitments*

##### **Australian Government \$80 million**

- \$20M for enabling infrastructure informed by a Cross-Border Health Taskforce and/or Albury Wodonga Health Service.
- \$15M for housing and accommodation for workers in the health sector.
- \$22 M for the Wodonga TAFE's Heavy Vehicle Technology Program.
- \$10M towards the Albury Entertainment Centre redevelopment.
- \$5M for the Albury Airport expansion.
- \$1M to support the Aboriginal community, pending outcomes of a business case underway.
- \$2M for advanced manufacturing.
- \$5M towards developing Gateway Island and the Murray River Experience precinct.
- Transfer of Commonwealth land at Gateway Island to City of Wodonga
- Transfer of Commonwealth land at Lavington

##### **AlburyCity Council \$37.8 million**

- \$20M for Albury Airport expansion
- \$7.8M for Murray River Experience
- \$5M for Albury Entertainment Centre redevelopment
- \$5M for the Lauren Jackson Sports Centre – Stage 1 redevelopment

##### **Wodonga Council \$12.1 million**

- \$6.1M for LOGIC
- \$6M for Gateway Island

### Global and regional trends, and local influences

Economic development in Albury is influenced by a broad range of global and regional factors that are experienced at a local level through an evolving lens of policy and strategy that is developed at the national, state and regional levels.

#### GLOBAL FORCES

Digital transformation | New technology and smart cities | Shift to regional areas | Shifts in supply chains and manufacturing | Demographic changes, including an aging population | Decarbonisation and managing climate change impacts | Inflation and rising business costs | Emerging and future industries | The great resignation | Tight labour market | Demand for flexibility | Changing nature of work | Geopolitical tensions and rising uncertainty | Climate change

*2030 Agenda for Sustainable Development | Albury Wodonga Regional Deal | Australian Governments Industry Growth Centres | Federal migration policy | National Climate Resilience and Adaptation Strategy*

*Ovens Murray Regional Economic Development Strategy | 2021-2025 Strategic Plan (Victorian Department of Jobs, Precincts and Regions)*

*Albury Regional Jobs Precinct | Albury Wodonga Regional Economic Development Strategy 2018-2022 | Albury Wodonga Functional Economic Region | 20 Year Economic Vision for Regional NSW | NSW Premier's Priorities | NSW Regional Development Framework | Riverina Murray Regional Plan 2036 | NSW Government's 'Our Regions' publication on Riverina Murray | NSW 2040 Economic Blueprint | NSW Government's COVID-19 Economic Recovery Strategy | NSW Food and Beverage Manufacturing Industry Development Strategy | NSW Circular Strategic Plan 2020-23 | NSW Government Innovation Strategy NSW Government Aboriginal Procurement Policy | NSW Plastics Ban | NSW Government Ageing Strategy 2016 – 2030*

*Albury Wodonga Destination Management Plan 2019 – 2023 | Albury Retail Action Plan | Murray River Regional Experiences Masterplan | Wonga Wetlands Tourism and Product Development Masterplan | Albury Wodonga Smart Community Framework and Strategy | Local Strategic Planning Statement | Thurgoona Wirringa Precinct Structure Plan | Albury Airport Master Plan | Albury Industrial Hub (Nexus) Master Plan | CBD Parking Strategy and Bicycle Plan | Events Strategy | Albury Entertainment Centre Business Plan | Albury and Lavington CBD Masterplans | Albury and Lavington CBD Masterplans | Albury 2050 | Albury Wodonga Integrated Transport Strategy | Urban Forest Strategy | Albury Local Housing Strategy | Albury 2050 | Albury Wodonga Integrated Transport Strategy | Urban Forest Strategy | Albury Local Housing Strategy*

#### LOCAL PRINCIPLES

Opportunity for all | Liveability | Diversity and inclusion (People and industry) | Sustainable growth and reinvestment | Environment & natural assets | Partnership & collaboration | Leadership & innovation | Regional Hub



## Emerging Issues and Ideas



## Overview of key themes

Based on a review of key documents and outcomes of consultation to date (including the EDS 'What We've Heard report') a range of key themes have been identified. These themes are intended to frame discussion around key drivers of the economy, actions that could be developed, or issues that if addressed could unlock new opportunities.

These emerging issues and ideas are not the objectives of the EDS. While some of these issues may become EDS objectives, their purpose here is to inform identification of final objectives, outcomes and actions for the EDS 2023 - 2027.



Equality of opportunity



Brand Albury



Environment & natural assets



Leadership & innovation



Liveability



Sustainable growth and reinvestment



Partnership & collaboration



Regional Hub

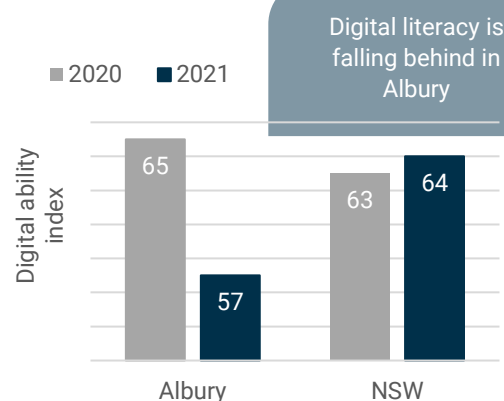
## Opportunity for all

Traditionally home to the Wiradjuri people, the region hosts a unique multicultural heritage and community. Following World War II Albury became home to German, Dutch, Italian, Greek and Polish migrants, more recently Vietnamese, Philippine, Laotian, Albanian, and Bosnian residents joined the community. Albury has become a regional settlement hub for families from The Congo, Nepal, Bhutan, and Sudan.

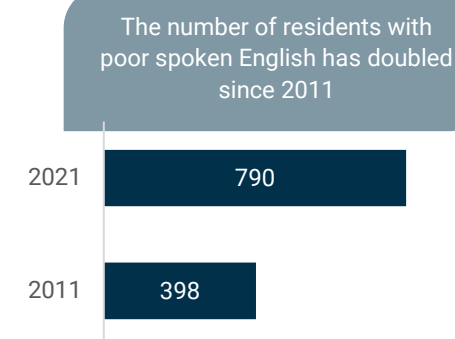
The Albury community is diverse and welcoming and strives to be a community which is safe, where everyone has access to quality facilities, activities, and human services. We take pride in celebrating our heritage and multiculturalism within our community.

### Challenges

- Albury Wodonga is a cross border community and with that come many challenges such as ensuring that residents, regardless of State residence, have equity of access to health, education and employment opportunities.
- Lack of public transport can hinder access to health and education services and employment opportunities.
- Under-representation of minority groups in community decision making.
- Poor accessibility for persons with disabilities.
- Digital inclusion has fallen in Albury (Appendix H), maintaining digital ability, through constant development and update of knowledge is crucial to ensure fair and equitable access to online services and opportunities.



- An increasing number of residents speak a language other than English and speak English not well or not at all. Poor English skills can lead to social isolation and compound challenges connecting with community, accessing services, gaining employment and general day to day life.



- The rate of unemployment for Aboriginal and Torres Strait Islander residents in Albury is consistently higher than the State average and has increased over the past decade.

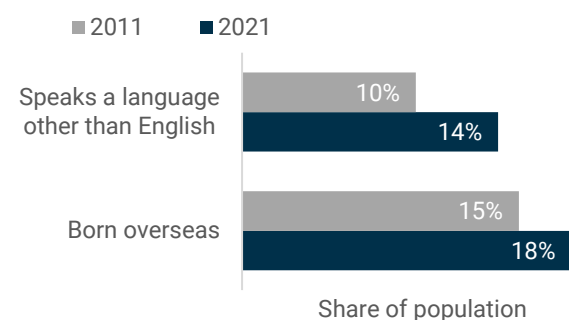
Labour force participation for First Nations persons is 50% in Albury. One in four of those participants is unemployed.



## Opportunities

- Towards Albury 2050 clearly articulates the community's vision for the future of Albury and strategies to work toward that vision.
- Work with local businesses and education and training providers to improve the local provision of further education or training as a means to address existing skilled labour shortages and help to retain young people.
- A diverse range of community events provide opportunity to reach and communicate to residents that may not otherwise engage with Council, business or industry. Community events offer the chance to connect, facilitate retail and food and beverage services in an environment that is focussed on experience. Hosting of such events along the banks of the Murray River offers an experience unique to Albury.
- Promotion of community focussed digital literacy courses in a bid to address inequity in digital literacy.
- Community Wealth Building (CWB) aims to retain and recirculate profits locally, thereby delivering greater benefit to the community through economic growth (see next page). There is opportunity to investigate Community Wealth Building and where this framework may be most appropriately established in Albury.
- There are a range of existing community networks (such as sporting clubs, interest groups, volunteer organisations, and the like) which already exist in Albury. Expanding and growing such networks is critical to not only improving community connectiveness but maintaining it.
- Acknowledge the Wiradjuri people as traditional custodians of this land, and work together to create culturally aligned services to improve health, education and employment goals. Charles Sturt University is committed to improving First Nations education, research and engagement.

- The rate of Indigenous participation in the labour force has remained stable (around 50%) over the past decade. The rate of participation in Albury remains below that of the State (at 54%). An increasing participation rate is reflective of increased opportunity and strong economic conditions. There are long-term social, health and economic benefits associated with increasing participation rates and particularly with sectors of the community that are underrepresented in the workforce.
- There is an opportunity to make information more accessible to the community by ensuring communication will reflect existing cultural, linguistic and digital diversity.



Albury is becoming increasingly culturally and linguistically diverse

- Encourage participation in leadership roles and groups by people from a diverse range of backgrounds.
- Charles Sturt University Innovation Hub offers programs for entrepreneurs from across regional NSW aimed at validating their business idea. Supported by the NSW Government Boosting Business Innovation Program, the Innovation Hub offers pre-accelerator programs, founder events, innovation and entrepreneurship programs for university and high school students.



## What have others done?

**Sydney Metro Aboriginal participation case study**

In a bid to increase Aboriginal employment and business participation, Sydney Metro established a collaborative model working with industry and government to ensure the Sydney Metro Workforce Development, Aboriginal and Industry Participation plans were developed and implemented.

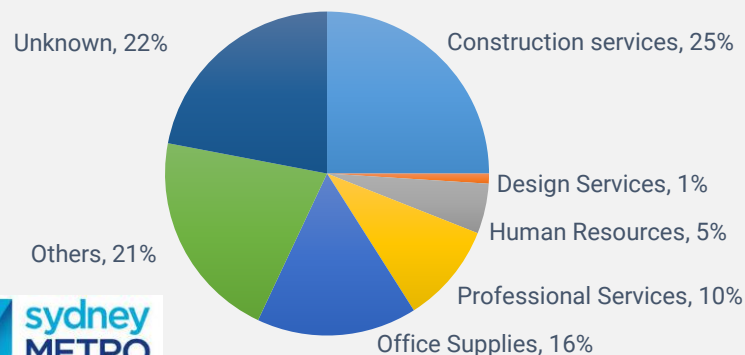
Initiative 1: Minimum requirements, for example, in workforce participation and contract spend with Indigenous supply chain businesses.

Initiative 2: Bid back mechanisms allowed tenders to bid back their own initiatives and commitments to further drive Aboriginal participation.

Initiative 3: Collaborative forums and client led programs, which brought industry expertise and government partners together.

As at May 2022 Sydney Metro has achieved Aboriginal participation in the workforce: 2.7%, 9.2% of apprentices were Aboriginal.

**Representation of Aboriginal businesses  
in the supply chain as of May 2022**

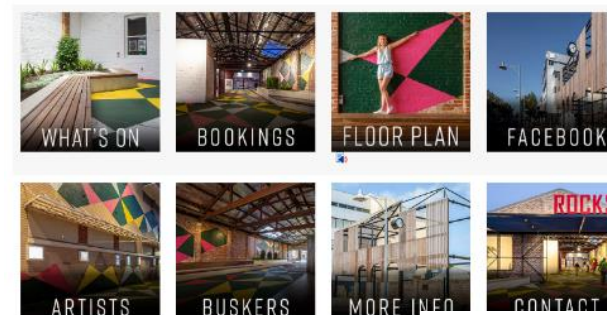
**Rocks Laneway community hub**

Rocks Laneway (City of Greater Geraldton) is a vibrant community hub that lies in the centre of the retail precinct on Marine Terrace. This award-winning space is highly flexible and caters for a broad range of community activities.

The Rocks Laneway Project was the first cab off the rank in the revitalisation of the City Centre. The project not only created a major new pedestrian connection between the CBD and the Foreshore, but also features spaces for year-round community events and activities, including opportunities for local artists to exhibit and perform.

## ROCKS LANEWAY

Rocks Laneway is a vibrant community hub that lies in the centre of the retail precinct on Marine Terrace. This award winning space is highly flexible and caters for a broad range of community activities. You can regularly catch live music, yoga sessions and free activities galore happening in the space.



## A focus on: Community Wealth Building

Community Wealth Building (CWB) is a framework for economic development that aims to retain and distribute wealth within an area to create an inclusive and sustainable economy. CWB localising economic development initiatives, embedded community ownership, which in turn generates outcomes such as social issues prevalent in local areas with collective wellbeing and local resilience<sup>i</sup>.

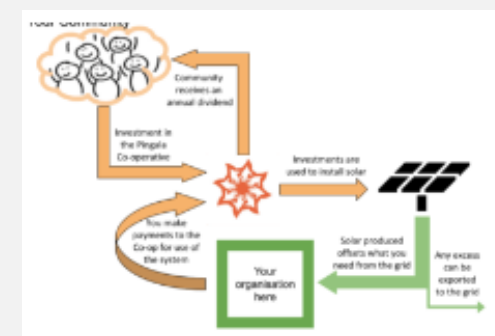
### Examples of Community Wealth Building



In response to the announced closure of the only fuel station in Yackandandah, the local community united and raised capital to purchase and invest in the business<sup>ii</sup>. The Yackandandah Community Development Company (YCDCo) formed as an unlisted public company with 650 local shareholders. YCDCo owns and operates the town's petrol station, along with a rural supplies and hardware business and a local newspaper publisher. The returns to the local community include a reported 12% growth in the share price, 5.7% dividend yield for FY 2019-20, and support for local community initiatives.



Based in Sydney, Pingala Energy is a community-owned organisation that implement localised financing models for renewable energy projects<sup>iii</sup>. Pingala is operated under a distributing cooperative model that enables the community to invest in solar projects where the business pays for the initial electricity it receives from the solar installation and the community investors receive a dividend.



Muswellbrook Shire Council established their Future Fund in 2014 with the objective of economic diversification and transition of local industry to secure ongoing job opportunities for the local community<sup>iv</sup>. The Fund has been used to invest in assets such as restoring heritage buildings, consolidate car parking in the town centre and improve the quality of the commercial building stock. In addition, the fund has also support education infrastructure for the University of Newcastle, TAFE, Conservatorium of Music, and a residential student accommodation facility.

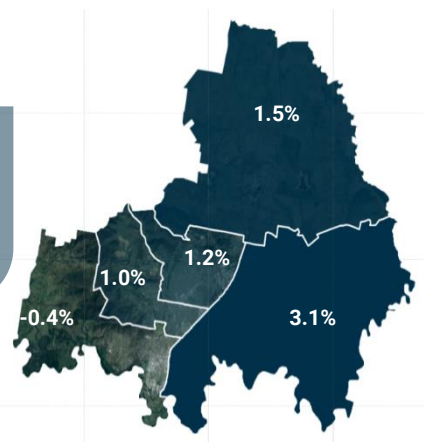
## Liveability

Liveability is intrinsically linked to economic growth. Australian cities need to remain 'liveable' as they grow and change. A liveable community is one in which day to day life is easy and comfortable to carry out for a range of different people. It should be 'safe, attractive, socially cohesive and inclusive, and environmentally sustainable; with affordable and diverse housing linked by convenient public transport, walking and cycling infrastructure to employment, education, public open space, local shops, health and community services, and leisure and cultural opportunities<sup>v</sup>.'

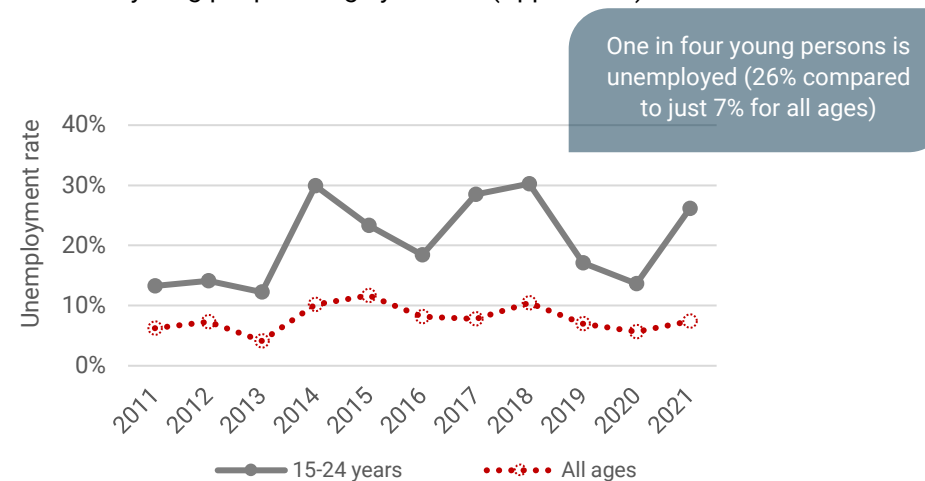
### Challenges

- Limited public transport options for those who do not have private vehicles.
- Albury's growing population increases demand (and opportunity) for certain types of services, such as health care, education, and construction. The characteristics of the growing population, such as where they reside, age, income, skills and education, can influence the types of opportunities and constraints that present themselves in relation to actions that support economic development.

2016 to 2021: Albury's population growth of 1.4% outpaced the State average of 0.9%, with suburbs in the east and north experiencing even higher growth.



- Young people leaving for further education or employment. Unemployment rate for young people is highly volatile (Appendix D).



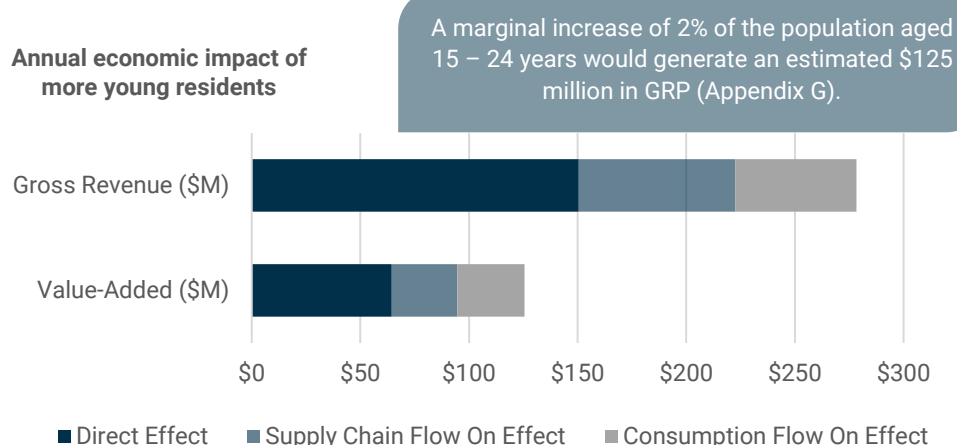
- House prices have increased 4.5% per annum over the past decade.
- Lack of social housing, with some social housing applicants waiting ten years for housing.



## Opportunities

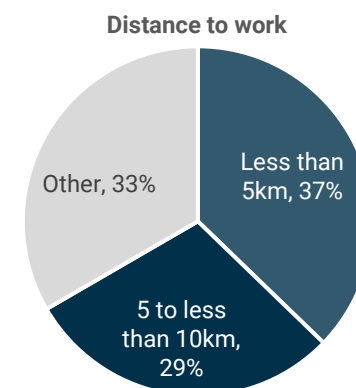
- AlburyCity is currently developing the Local Housing Strategy, as part of Council's approach to appropriate, affordable and well-designed housing.
- Encourage a supply of housing where and when it is needed. Support the timely delivery of infrastructure in new or renewed housing areas. Encourage the supply of affordable and diverse housing.
- Redevelopment of existing vacant social housing as a priority.
- Greater connection between university campuses and the CBD.
- Employment and business opportunities associated with servicing lifestyle and needs of an ageing population
- Work to curb the exodus of young people to retain local skills, fill labour gaps, and boost local consumption (Appendix G).

### Annual economic impact of more young residents



- Improve pathway connections for cyclists and pedestrians. Create pedestrian only or pedestrian centric areas in the CBD. This will enhance ground level appeal, enrich the visual amenity and boost retail activity.

Two thirds of workers reside less than 10 km to work, highlighting opportunity for improved pathways to increase active travel



- Attracting migrants and refugees to grow the community, the workforce and increase diversity. Where required targeted English training will support employment opportunities.
- Transformation of the old pumphouse to PumpHouse Maker Space & Artist Workshop – a place to visit and create. Completion expected Mid-2023.
- An effectively functioning public transport system can increase productivity for the economy as a whole by enhancing access to jobs, increasing business and freight movement efficiently, and through easing growing road congestion pressures<sup>vi</sup>.

## A focus on: Retaining young people

### Why are young people leaving regional areas?

Leaving a regional area can have more to do with identity than education or job opportunities.

Young people report a cultural expectation to leave the region for city life, for some staying in their home towns is equated with failure.

Development of high-speed internet access throughout rural and regional areas is becoming increasingly important in providing education and employment opportunities for young.

Decision making by younger people about outbound migration from rural communities is a process that can begin early in life, and commonly takes effect after they have left secondary school.

To gain access to education and training, employment, or to experience urban and/or international lifestyles.

The lack of a range of public transport options represents a significant barrier to the wellbeing of younger people and is often disincentive for them to live and work in regional areas.

Lack of affordability accommodation options for younger people.

The **AlburyCity Youth Council** are responsible for representing and advocating for young people in our community, building awareness and educating the wider community on youth related issues and making responsible decisions on behalf of young people.

### What can be done about it?

Retaining young people can be as much about shifting community attitudes and expectations as it is about creating local employment opportunities.

Engaging young people in the planning of regional cities, incorporating sporting, cultural and volunteering infrastructure and green spaces into the design of new regional suburbs and rural communities.

Rural and regional mentoring programs be established (where not available) to develop real life skills.

Government and community work to develop leadership skills of regional youth.

Regional programs aimed to address issues of discrimination and intolerance against people on the basis of race, gender, cultural differences or sexual practice.

Increase regional development initiatives in the following areas: Health service hubs; Mental health services; Rural youth workers; Childcare services; Transport; Education; and Youth-friendly public spaces and recreational activities.

Improvements to public transport services and interconnectivity in regional areas so that young people can access education, training and leisure opportunities.

Ensure alignment of career advice in secondary schools with local employment opportunities, promoting a wider range of pathways to training and employment and increase the degree of individual advice and support given to school leavers.

Improve local provision of education and training offerings.

Based on Victorian Rural and Regional Services and Development Committee Inquiry into Retaining Young People in Rural Towns and Communities and a study undertaken for The Conversation (<https://theconversation.com/its-almost-like-you-have-to-leave-young-people-from-regional-areas-face-a-big-stigma-if-they-dont-move-to-the-city-168655>).

**What have others done?****Central Highlands Regional Council Cycling Path Upgrades in Emerald**

Most regional councils share the common issue of limited public transportation options. To combat this without the behemoth investment required to develop new public transport infrastructure (tram, train, and bus), Central Highlands Regional Council improved its cycling network in Emerald in line with The Emerald Cycleway Network program.

The investment into its cycle networks since 2016 and beyond has seen kilometres worth of upgrades. This not only provides better paths but promotes wellbeing and a healthier diverse and active lifestyle within the community. As a result, it has created a safer cycling network and in turn encouraged more cycling within the area for visitors and locals.

Further, investment into cycling networks promote foot traffic and potential retail activity within shopping districts as the path runs into the town centre of Emerald.

**For consideration**

- What are current deterrents from taking up active travel for those living within close proximity to place of work?
- What active travel programs are currently running in local schools?
- Can the sense of community be built through increased volunteering for charities?
- Are community events well attended? What differentiates a well-attended event from an event with low patronage?
- Is there an understanding of public transportation demand by suburb?
- Increased density in the CBD will diversify housing product and help to activate CBD at night.

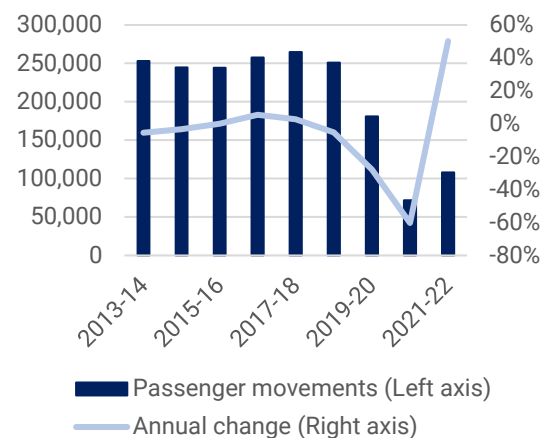
## Brand Albury Wodonga

Albury and Wodonga are two cities located in two different states. However, the strength and capacity of the “Albury Wodonga” brand is greater than the sum of its parts. Albury Wodonga’s place in the world and in regional Australia is not limited to geography. Defining identity, differentiating characteristics, advantages and opportunities will build brand Albury Wodonga in a way that ensures clear and consistent messaging across a range of audiences.

Brand Albury Wodonga goes beyond tourism attraction, and seeks to get the message out that Albury is a great place to experience, live and invest. Brand Albury Wodonga has the potential to be utilised by local business and industry as a means to promote the City’s competitive advantages and industry strengths.

### Challenges

- Business investment attraction is becoming increasingly competitive.
- Poorly defined point of difference. Council’s Advocacy Strategy identified the need to raise Albury’s profile in a planned and proactive approach, recognising the political and market profile of the City is imperative to the continued growth and development of the city, and the businesses and industries that call it home<sup>vii</sup>.
- Authentic place branding is a social process that is created by the people who live and work in a place. Getting buy in from a diverse range of stakeholders can be a challenge when establishing a consistent vision for a region.
- Ineffective place-branding has been associated with overreliance on visual identities and narratives, poor communication of the brand information, and overemphasis on presenting quality of life and affordability. Place-branding emphasis key elements of the local area (be it natural, industrial or social), selection of these elements determine how effective the place will be at attracting and retaining business<sup>viii</sup>.
- Regional destinations are working to re-establish their local tourism markets and demonstrate demand and need to a return to pre-Covid passenger flights to regional airports. Passenger numbers through Albury Airport remain at less than half pre-Covid rates. The challenge for Albury’s destination marketing reinstatement of flights to, and the reactivation of key domestic tourism markets.



Passenger numbers through Albury airport plummeted in 2020, there have been slow signs of recovery in 2022, (however the last 6 months have seen passenger numbers return to within 10% of pre-Covid levels)



### Opportunities:

- Key projects under Two Cities One Community have been the development of Invest Albury Wodonga, Visit Albury Wodonga, Live Albury Wodonga. These projects reflect communities' vision for the region and attempts to align investment and business activity towards existing competitive advantage.
- A strong brand can strengthen sense of place when there is alignment between residents, business, government and visitors.
- Albury Wodonga's proximity to the two large metropolitan markets Melbourne and Canberra are strong opportunities for regional branding and partnership development opportunities.
- A place brand can be effectively leveraged by local businesses to add value to their product or service. In this way, a strategically developed regional brand is a powerful tool for establishing competitive advantage.
- Branding can be used to set long term goals that can mitigate effects of sudden changes in policy.
- Align marketing and services with growing trends. Following the within and outer region trends will allow the brand of Albury Wodonga to remain relevant and move with the trends driving regional growth.
- Destination events reinforces local identity and encourages buy in to the place brand and strengthens sense of place.

Visit Albury Wodonga's social media followers increased by 30% across all platforms between 2020 and 2021.

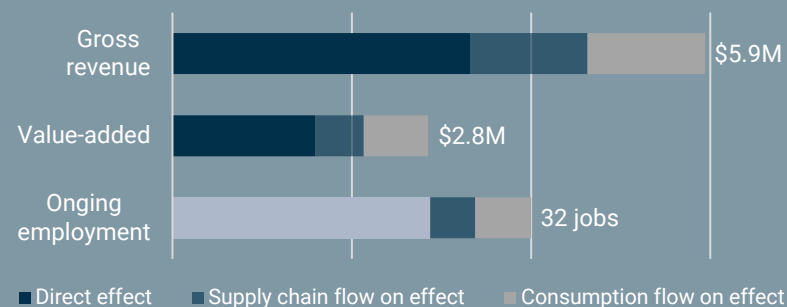
- Further development of the Albury Wodonga visitor brand requires continued partnership and joint governance between both councils. Consolidation of the Albury Wodonga visitor brand is a unique offering allowing the region to stand out within regional NSW and Victoria. The brand must continue to adapt and respond to consumer preferences and visitor trends.

### Marginal visitor increase delivers significant economic outcomes

1 million visitors to Albury Wodonga directly spend an estimated \$330 million locally each year further supporting \$260 million in supply chain and consumption effects. Between 2020 and 2021, domestic day visitors increased 6% and overnight visitors by 29%. Albury Wodonga tourism is on the road to recovery.

Every additional visitor sets a chain of economic flow-on benefits.

If improving place-branding attracted an increase in visitors of just 1%, Albury Wodonga would benefit by up to \$6 million in gross revenue, \$3 million in gross regional product and up to 32 ongoing jobs across a range of industries.



### What have others done?

#### Destination Rebrand

Despite Greater Shepparton City Council's success with its *'Many Great Things'* tourism branding since 2016, Council is undergoing a change in tourism branding to attract people to the region for alternate reasons and to unite Greater Shepparton as a tourism hub within the Goulburn Valley region.



With the adoption of the new tourism name *'Shepparton and Goulburn Valley'* (set to be rolled out late 2022), Greater Shepparton's identification with the wider region of Goulburn Valley allows for the promotion of the region in the revival of tourism as significant events and visitation numbers returned to pre-covid levels. To diversify visitation going forward, moving away from the historic strong friend and relative visitation numbers, the new branding facilitates a push toward Greater Shepparton being a destination which can be explored for its natural attractions, wine, and food. The unifying new branding of Greater Shepparton with the Goulburn Valley region allows for the council to stand out in the region as a tourism hub.



### For consideration

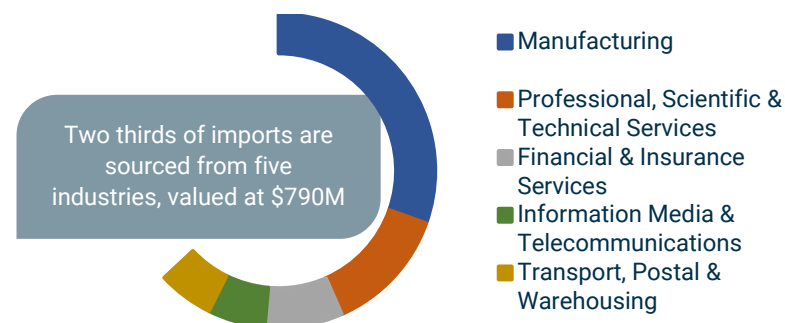
- Branding is an opportunity to showcase Albury's strengths as a regional hub and the City's role in servicing the wider region. Is the City's role as a regional hub promoted?
- Is local industry strength and specialisation celebrated? Are there a general understanding of the critical role Albury plays in the success of a range of regional industries?
- What should be considered when identifying the approach for Albury? Is a consistent brand the approach we want to explore, or is it best for industry, tourism, education and civic attraction to develop and promote themselves independently?
- Who would be best to be involved in any branding exercise? Other than Council, who would be best placed to coordinate it and who could be the champions?
- How can the Albury Wodonga brand be further leveraged?

## Sustainable economic growth

At its core, economic growth is required to better meet community needs and desires (be it products or services). Sustainable growth reflects economic, environmental and social longevity and the ability of a region to improve business and industry outcomes being mindful of the environmental impact and the parity of the social benefits that accrue now and into the future. The vision for a resilient Albury is founded in social equity, consideration of existing urban character and conservation of the environment.

### Challenges

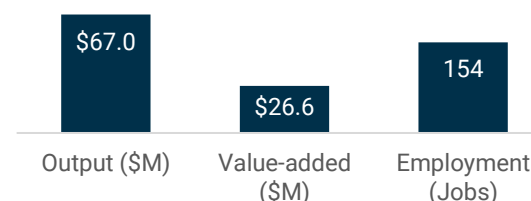
- Existing supply chain gaps
- Inflation, rising costs for intermediate goods and services and increasing supply chain expenses
- Rising interest rates and potential impact on household expenditure
- Traditional and inflexible business models, reluctance to adapt.
- Shifting consumer spending patterns and consumer expectations (i.e., increasing demand for a retail experience to include social interactions, entertainment in a unique setting).



### Opportunities

- Community acknowledges and values the need to balance growth of the city and environmental sustainability.
- More and more organisations are choosing to establish satellite offices in Albury
- Cluster identification, promotion, development and support.
- Support activities to promote and build export capabilities.
- Albury is identified by NSW Government as a Growth Centre. One of four focus areas of the State Government for Growth Centres is to "Build efficiency and redundancy in freight networks to improve supply, reduce disruptions and lower costs"<sup>ix</sup>.
- Support growth through local supply chain expenditure.
- Support industry diversification.
- Night time economy, success is typically dependent on a geographically proximate businesses to be consistently open during night-time trading hours.
- Retail adaption: Retail is the second largest employer, supporting 3,400 workers and an essential employer of young people (a third of the workforce is aged 15-24 years).

If 5% of import expenditure of industries listed above is captured locally, the total economic impacts will include:



### What have others done?

#### Night Time Economy

##### *Night Time Economy Council Committee*

Local government plays a key role in creating vibrant, safe and sustainable Night Time Economies (NTE). Many NSW councils take a proactive approach in the management of their NTEs through economic development and partnerships, placemaking and urban design, strategy, policy and research, planning and regulation, culture and creativity, and services, infrastructure and safety<sup>x</sup>.

A committee consisting of 16 Councils share information on best practices approaches to build NTE knowledge and capability.

##### *Wollongong CBD Night Time Economic Policy*

The City's NTE Policy allows eligible businesses in the Wollongong CBD to trade for longer hours. This policy aims to make a wider range of night time activities available while supporting our local economy<sup>xi</sup>.

The Wollongong CBD NTE has evolved significantly over recent years, since 2012,



110 new food and drink venues have commenced operating in the Wollongong CBD. There has been an increase in venues and significant public and private investment has resulted in increasing residential and employment opportunities in the city.



### For consideration

- What transport and land use constraints exist that may hinder activation of a night time precinct?
- What capacity does industry in Albury have to produce imported goods and services locally? What is holding industry back?
- Are there emerging industry clusters?
- What is local retail reporting, has expenditure recovered from the impact of Covid or has rising interest rates and inflation dampened household spending?
- What key supply chain constraints experienced over the past 18 months?
- What can Council do to better support your business?



## Environment and natural assets

Albury is home to a range of natural assets that provide important ecological services, contribute to liveability and attract visitors to the region. These assets include air, water, flora and fauna and protection of these assets through a reduction of environmental impact is critical to supporting economic sustainability.

Action on climate change requires regional, national and international coordination, however adoption of the “act local, think global” mantra will frame any actions and outcomes within a whole of ecosystem setting.

### Challenges

- . Lack of environmental and natural asset accounting (i.e., full value of natural assets). Environmental accounting presents an objective picture of the state of, and changes in, the natural heritage, interactions between the economy and the environment, and expenditure on preventive measures, environmental protection and the repair of environmental damage
- . Climate change will likely result in additional financial costs for businesses and residents. Hotter weather will increase demand and consumption of energy, variability in water availability will impact the productive capacity of agriculture, and extreme weather will increase the frequency of environmental and infrastructure reparation.
- . Costs associated with reducing environmental impact can be prohibitive for some businesses. Some technologies are still in infancy suggesting there may be some businesses adopting a wait and see approach to adopting process or technology improvements that will improve environmental outcomes.
- . Households play an important role in working toward environmental sustainability, however there can be a sense of hopelessness. Local council has a role in supporting households realise via education and provision of services that working together the community, working as a whole, can affect great change.

## Opportunities

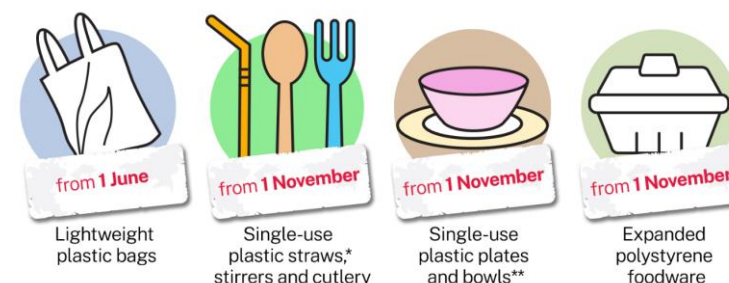
- Early 2022 the largest polyethylene terephthalate (PET) recycling plant in Australia commenced operations in Albury.
- Establishing the PET recycling plant cements Albury's position as a national leader in circular economy technology. Further support continued education for industry and residents of the benefits of a circular economy is required maintain momentum. Environmental targets and aspirations can be achieved while creating sustainable economic opportunities through the creation of a circular economy. Creation of higher paying and higher skilled jobs. Local government contribution through procurement, business education, and the creation of activation precincts.

### What is a Circular Economy?

- A circular economy aims to reduce the environmental impact of production and consumption while driving economic growth through more efficient use of natural resources.
  - A key part of "circular" production is a design process that enables effective recovery of components and materials that can be used, reused, recycled, redesigned and remanufactured.
  - Proponents of a circular economy argue that circular economic principles can foster innovation and productivity while creating more job opportunities and encouraging social inclusion.<sup>xii</sup>
- Costs associated with responding to climate change, such as provision of new infrastructure and equipment, also presents opportunities for local industry to develop and deliver these new resources.

- Urban design and renewal will take a considered approach to landscaping and tree plantings in order to deliver passive cooling, streetscape improvements and improved environmental outcomes.
- Support businesses to transition away from single-use plastics in line with New South Wales ban<sup>xiii</sup>.

### In 2022, NSW is banning certain single-use plastics



- Include sustainability measures in development.
- Lead by example, ensure Council's adoption and implementation of environmentally sustainable practices are communicated to the community.
- AlburyCity is a partner in the Climate Council's Cities Power Partnership, which consist of 175 local councils, and is aimed at accelerating Council's climate and energy goals. Partnering in the program allows AlburyCity councils access to practical tools, knowledge, support with frequent collaboration and knowledge sharing opportunities. Albury joined the Cities Power Partnership in 2017 to reinforce the City's commitment and continued focus on energy management.
- CSU is has a strong environmental education program.

### What have others done?

#### Logan City Council Biosolids Gasification Facility

Like many councils in recent years who are engaging and committing to carbon neutrality through the creation of environmentally conscious policy and investment, Logan City Council has implemented an economical and efficient way to reduce waste. In efforts to make progress towards their target of carbon emission neutrality, South East Queensland's Logan City Council is turning human sewage into renewable energy.

With the backing of Federal Government's Australian Renewable Energy Agency (ARENA), Logan City Council has opened a \$28 million Biosolids Gasification Facility. Not only will the facility reduce carbon emissions by 6000 tonnes and save the council \$1 million annually, but a potential revenue stream is additionally created, biochar, the end product of the process. Biochar is rich in nutrients and can be used in the agricultural industry.

The facility provides wastewater treatment for approximately 300,000 people and reduces both costs and emissions through the reduction of sewage into an environmentally conscious product. Not only does this facility reduce the environmental footprint of the council but improves the economic growth of the local economy through its revenue creation<sup>xiv</sup>.



### For consideration

- What perceptions do private organisations have regarding adoption of environmentally sustainable practices? Are they seen as impractical, too expensive or have businesses adopted practices and seen the benefits to their bottom line?
- How are business and industry accessing information regarding steps they can take to work toward sustainability goals?
- What waste reduction measures are already in place in local industry?
- Can improvements to household waste management be made by both households and Council's handling of waste? What employment or business opportunities does this create?

## Partnership and collaboration

No person or region exists in isolation. Partnerships are about harnessing the strengths and abilities of others to solve complex problems, mitigate risks and achieve mutually beneficial outcomes. There are numerous agencies, associations and interest groups with which to partner. Determining where the greatest synergies lie is often the most difficult part.

Business, government and the broader community will achieve the best outcomes for our city by working together.

### Challenges

- . Local Government is often best placed to provide leadership through coordination of partnerships and driving collective impact for multiple stakeholders.
- . Budget challenges and rising demand are creating challenging for councils to directly deliver requirements of their local population. A successful local government is being increasingly determined by the ability to identify, commission and manage strategic partnerships. That means using advanced negotiation, collaboration and management skills to get the maximum value out of every partnership<sup>xv</sup>.
- . Maintaining effective partnerships is a necessity due to Albury's geographic location (i.e., cross border) and role as a hub for servicing the wider region's population (education and health).
- . Addressing housing affordability, shortage of social housing and lack crisis housing will require coordination across a range of community groups, stakeholders and government agencies.
- . Issues such as aging and under resourced hospitals, poor access to electricity in industrial areas, and development constraints highlight ongoing challenges associated with maintaining effective partnerships with government and industry to advocate for proactive change and to adequately support local industry.
- . Effective partnerships are often impeded by:
  - a disconnection between national policy objectives and local goals.
  - limited administrative flexibility of many public programmes, including those which are relevant to local economic and employment development;
  - weak accountability relationships, between the various partners, between the partnership and the public, and between the representatives and their constituency; and
  - a tendency for partnership-based organisations to be process-driven as they seek to secure their continuity<sup>xvi</sup>.



### Opportunities

- . Work together and advocate on behalf of the community for improved services.
- . Work with industry to understand existing constraints.
- . Utilisation of State Government owned land for community benefit.
- . Potential to improve business efficiencies by advocating for simplified cross-border regulations (e.g. skills, public transport)
- . Advocate and collaborate for the priorities as identified by local Aboriginal and Torres Strait Islander representative groups.
- . Leadership across government, private sector and non-government organisations is critical in demonstrating the importance of the investment for the region.
- . Look to include potential, emerging and new leaders in existing leadership groups.
- . Working with other levels of government to garner support for priorities identified by Council and the community.
- . Bolster affordable and social housing provision<sup>xvii</sup>:
  - o Partner with other Councils to build knowledge base on effectiveness of affordable housing policies, actions and outcomes.
  - o Broker relationships between local providers and community groups.
  - o Advocate localised issues to state and federal governments to affect change in policies.
  - o Investigate public-private joint ventures to mobilise private capital with the public sector “topping up returns for investors”.

#### Albury-Wodonga Regional Deal

The Albury-Wodonga Regional Deal is a collaboration between the Australian Government, New South Wales Government, Victorian Government, Albury City Council and City of Wodonga Council.

Realised through a process of cooperation and collaboration the Albury-Wodonga Regional Deal is a partnership across all levels of government which will see the development and implementation of a range of projects which align with community priorities and council plans to deliver economic, tourism and community benefit.

Identification of the Regional Deal priorities were determined through consultation and collaboration with community reference groups and local business.

**What have others done?****Award winning partnerships**

Water Proofing the West is an integrated water sensitive urban design solution to the challenges associated with stormwater management, stormwater quality improvement, flood management and water supply management in a fully developed urban environment.

Charles Sturt City Council lead the project partnering with all levels of government and the private sector to secure funding for the project which will ensure that in a 1 in 100 years rainfall event, Queen Elizabeth Hospital remains accessible.

Council worked with South Australian businesses to design and construct the works and the Project is a leading example of the range of skills and water expertise in South Australia.

This Project has a combined expenditure of \$71.5 million and is a collaborative funding project with nine funding partners from all three tiers of Government, a private land developer and the support of the West Lakes Golf Club<sup>xviii</sup>.

Funding contributor	Contribution (\$ million)
City of Charles Sturt	\$19.5
City of Port Adelaide Enfield	\$4.4
SA State Government	\$20.1
Commonwealth Government	\$22.3
St Clair JV developer	\$5.3
<i>Project budget</i>	<i>\$71.5</i>

The City of Charles Sturt Project has received awards from across industry sectors including the Local Government Managers Association, Stormwater South Australia, and the Stormwater Industry Association.

**For consideration**

- What private organisations in Albury can foster internal and external partnerships? Do you represent a sector or location that could benefit from networking and partnerships?
- What are the existing partnerships that could be strengthened? Are there existing partnerships that are being maintained but are no longer productive or beneficial?
- Council will typically lead inter-governmental partnerships. What role can Council play in facilitating or introducing private sector partnerships? What demand exists for 'institutional' partnerships to support research and development projects?
- Have existing issues come about through failed partnerships?

## Leadership and innovation

Leaders are agents of change. Leadership in economic development is about identifying the people or organisations who exemplify best practices in a region and are walking the walk, inspiring a shared vision of increasing prosperity for the region, and are enabling others to act.

There will not be one single leader or approach to leadership that suits all sectors of the economy or community. It is therefore important to identify and support leadership across the spectrum of interest groups. Some key leadership roles to consider will be, Council, business and industry, community leaders and Indigenous leaders. Local government is a source of innovation in governance and service delivery. Council has a role in leading change, and supporting entrepreneurs and adopting an innovative and forward-thinking mindset.

### Challenges

- . In recent years there has been significant change in community lifestyle, work patterns, demographics, methods of communication and collaboration. Local government needs to be flexible, willing to adjust leadership style to the changing environment to meet community expectations and to support business innovation.
- . Economic development is a whole of community business.
- . Incremental opportunistic economic development can pose significant threat to the future of regions and places. A combined voice for leadership is important to ensure actions taken move the region in the desired direction.
- . Making hard calls and holding course can be politically challenging.
- . Strength in economic leadership often comes through partnerships, communication and networking to impact cultural change that can then drive a strategic direction for a location.
- . Strategies that foster economic development outcomes that 'grow from within' have been linked to greater local prosperity, higher levels of labour force engagement and greater success for small / medium businesses.
- . New technologies are transforming the life, work, communication and interaction with service providers. Council leaders will need to stay ahead of developments and identify ways to make innovative, useful and cost-saving use of digital technologies.
- . Council leaders will need to partner with specialists, or acquire the right skills in-house, to gather, analyse and interpret that data to design new services and new efficiencies<sup>xix</sup>.
- . No single portal to obtain real time Council data and information.
- . Larger businesses are generally more collaborative and more innovative (Appendix I). For Albury City, this highlights potential barriers to promoting innovation within the business community given the large share of small businesses. Commonly cited barriers to innovation include:
  - Lack of access to additional funds.
  - Lack of skilled persons within business and the labour market.
  - Cost of development or introduction/implementation.
  - Uncertain demand for new goods or services.
  - Government regulation and compliance.

**Opportunities:**

- Improved productivity for business through increased uptake of digital technologies (two in five businesses report improvements to customer service, revenue and productivity as key benefits of adopting innovative business practices). (Appendix I).
  - Innovation is more likely to be adopted by businesses operating in information and telecommunications, professional services, retail and manufacturing.
  - Of businesses actively innovating, those in accommodation and food services, wholesale, and information and telecommunications are more likely to report increased revenue.
- Lead by example, develop data portal allowing residents and businesses to access real-time data managed by Council, including information regarding spatial data, property and planning, hire of council facilities, etc. Working with private sector will provide opportunity for Council to learn and absorb commercial skills.
- Continue to support and develop the well-established opportunities in Albury for youth leadership, developing their capabilities as future leaders (e.g., Youth Council, Retro Youth Management Committee).
- Sector based business networks can be auspiced and initiated by Council and have the potential to create their own momentum through strong networks, information sharing and alignment of issues.
- Strategies that recognise the role of the private sector in driving economic development, creating jobs and identifying local issues such as limitation in the ability to access skilled employees are important.
- Leadership is critical to strong, tireless and unashamed advocacy. Transformative projects can take a decade or more from conception to realisation.

**Leading Edge Data Centres Data Centre Albury-Wodonga**

Albury-Wodonga was the choice for one of Leading Edge Data Centre's data centres in the company's efforts to build a 26 site regional edge network across Queensland. The data centre will allow Albury-Wodonga to be up to speed with cities such as Sydney and Melbourne and increase the regions presence in global markets.

The data centre will reduce network latency and provide high internet speeds to the region. The \$7 million data centre creates growth opportunities for existing and new businesses, which in turn is increasing the attractiveness of the region for innovative investment. The facility was the first of Leading Edge Data Centre's facilities to use Schneider Electric technology. This investment in the Albury-Wodonga region's data capabilities, infrastructure and innovation has contributed to growth and the ongoing transformation and facilitation of innovation.





## What have others done?

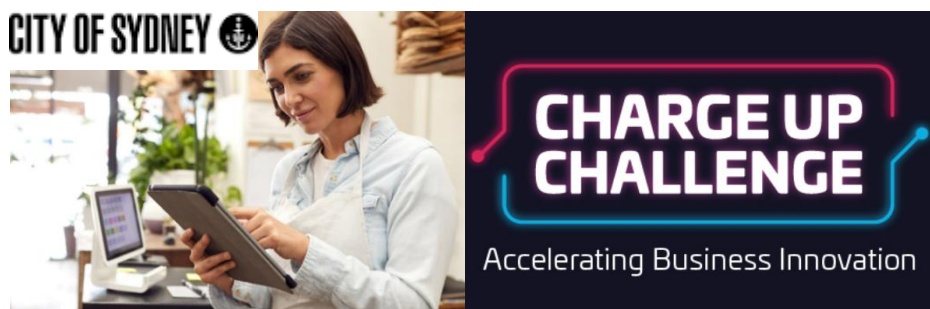
## Accelerating digital transformation for business

Launched in 2019 the Charge up Challenge is funded by the City of Sydney and provides a free course aimed at accelerating business innovation and digital transformation. Participants are selected through an expression of interest process, following which they undertake an intensive 3-day workshop, followed by weekly mentoring and information sessions.

Outcomes for the participants included:

- 3 new businesses or business lines launched.
- 5 of the businesses pivoted their business model.
- 42 direct connections facilitated.
- 38 new partnership opportunities.
- 4 investor meetings with 1 investment commitment so far.

The program's early success has ensured continuation of the program and the City of Sydney has been approached by other Councils interested in applying a similar program within their localities<sup>xx</sup>.

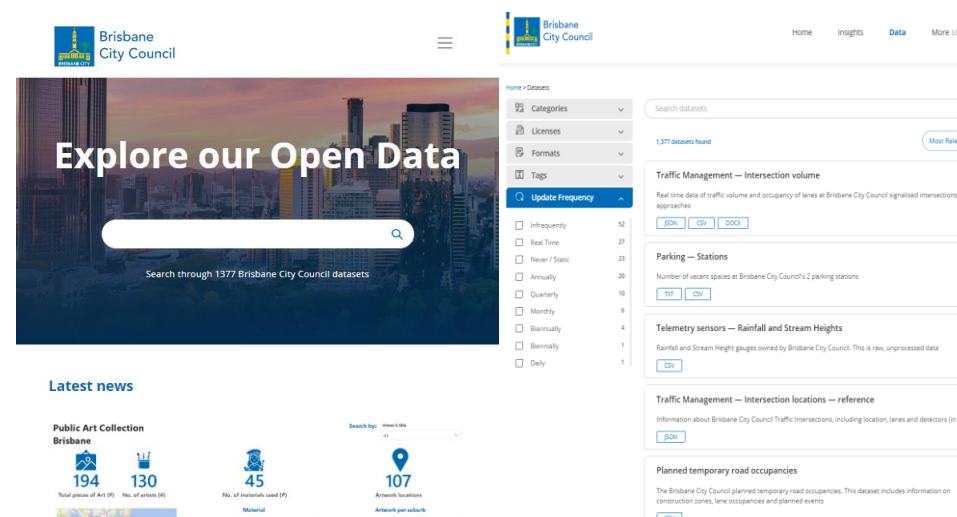


## Open access to Council data

The Brisbane City Council's open data portal was created with the aim of providing an easy way to find, access and reuse the city's public datasets. The city wanted residents, visitors and the developer community to be able access the data that city maintains, and to use that data however they see fit – free of charge. The datasets are available in a variety of formats (.csv, .kml, .html etc.).

Brisbane City Council has adopted the metadata schema shared by data.gov.au, data.sa.gov.au and data.nsw.gov.au. This puts it in a great position for metadata sharing between other councils and the QLD state platform if and when such a requirement is established.

Notable datasets include CityCat, CityFerry and CityHopper Timetables, a listing of Ferry Terminals and references for the Brisbane Ferries Monitoring API. You can also grab real time data of traffic volume and occupancy of lanes at Council signalised intersections and approaches<sup>xxi</sup>.



## For consideration

- Is the community (business and resident) kept informed of policy successes? Does Albury City effectively communicate its competitive advantages?
- Does AlburyCity have the right skills in place today to implement identified opportunities and support innovative actions? What are the existing gaps – how can they be filled?
- What capacity does Council have to become a leader of innovation and data analytics? Are there opportunities to partner with private sector
- Are there critical pieces of analysis, feasibility or preliminary investment that is required to unlock opportunities in priority areas? Who are the people / organisations that would partner to deliver this?
- Consider roles for key elements including Governance | Partnership | Delivery



## Regional Hub

Regional hubs serve as centres for wide rural and regional areas through the provision of access to education, jobs, personal and professional services, recreation and opportunities for cultural participation along with a host of other amenities for their local communities and those in smaller surrounding communities. Consideration of the strategic role a regional hub plays in wider area will strengthen connections and further solidify the regional hub's role as a centre of activity.

### Regionally significant assets

#### Transport

Hume Freeway M31  
Riverina Highway B58  
Albury Airport  
Albury Rail Station  
Inland Rail  
Ettamogah Rail Hub

#### Health

Albury Wodonga Cancer Centre.  
Albury Base Hospital.  
Regional Trauma Centre (for North East Victoria and NSW catchment)  
Emergency Department (receives North East Victoria and NSW catchment orthopaedic cases).

#### Education

Charles Sturt University (Thurgoona)  
La Trobe University  
Riverina Institute of TAFE  
UNSW Rural Clinical School of Medicine

#### Cultural

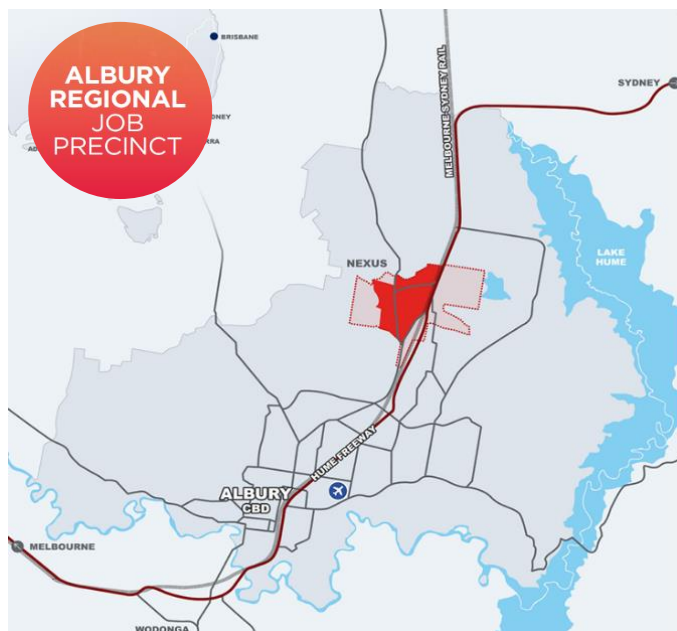
Albury Entertainment Centre  
HotHouse Theatre  
Murray Art Museum Albury (MAMA)  
PumpHouse Maker Space & Artist Workshop

### Challenges

- Albury has become increasingly important to surrounding areas as a service hub. This hub and spoke system will continue to reinforce Albury's role in servicing surrounding areas however, in coming years will require continued infrastructure investment to meet the changing needs of community (business and residents) locally and those of surrounding areas.
- To continue to attract new and expanding industries the region requires critical enablers such as digital connectivity, water security, affordable energy and common user infrastructure.
- Widespread supply chain shortages and disruptions driven by unprecedented demand and constructed logistic capacities will continue to impact regional economies, compounded by rising costs and inflation.
- Cross border issues coupled with a lack of funding from the government for cross border zone, particularly for health services.
- Gaps on key regional connections, e.g., lack of reliable train service between Albury and Melbourne, no direct flight to Canberra.
- Sustaining Albury's role as a regional hub is highly dependent on appropriate workforce and skills.

## Opportunities

- Upgrades to existing track will connect Albury to a 1,700km freight line between Melbourne and Brisbane (Inland Rail). The Colin Rees Group's rail hub at Ettamogah has been identified as an intermodal terminal along the rail corridor that will support regional supply chains and help producers get better access to markets.
- Establishment of the Albury Regional Job Precinct will fast-track approvals to better leverage opportunities associated with an expanded Nexus Industrial Precinct and the Ettamogah Rail Hub.



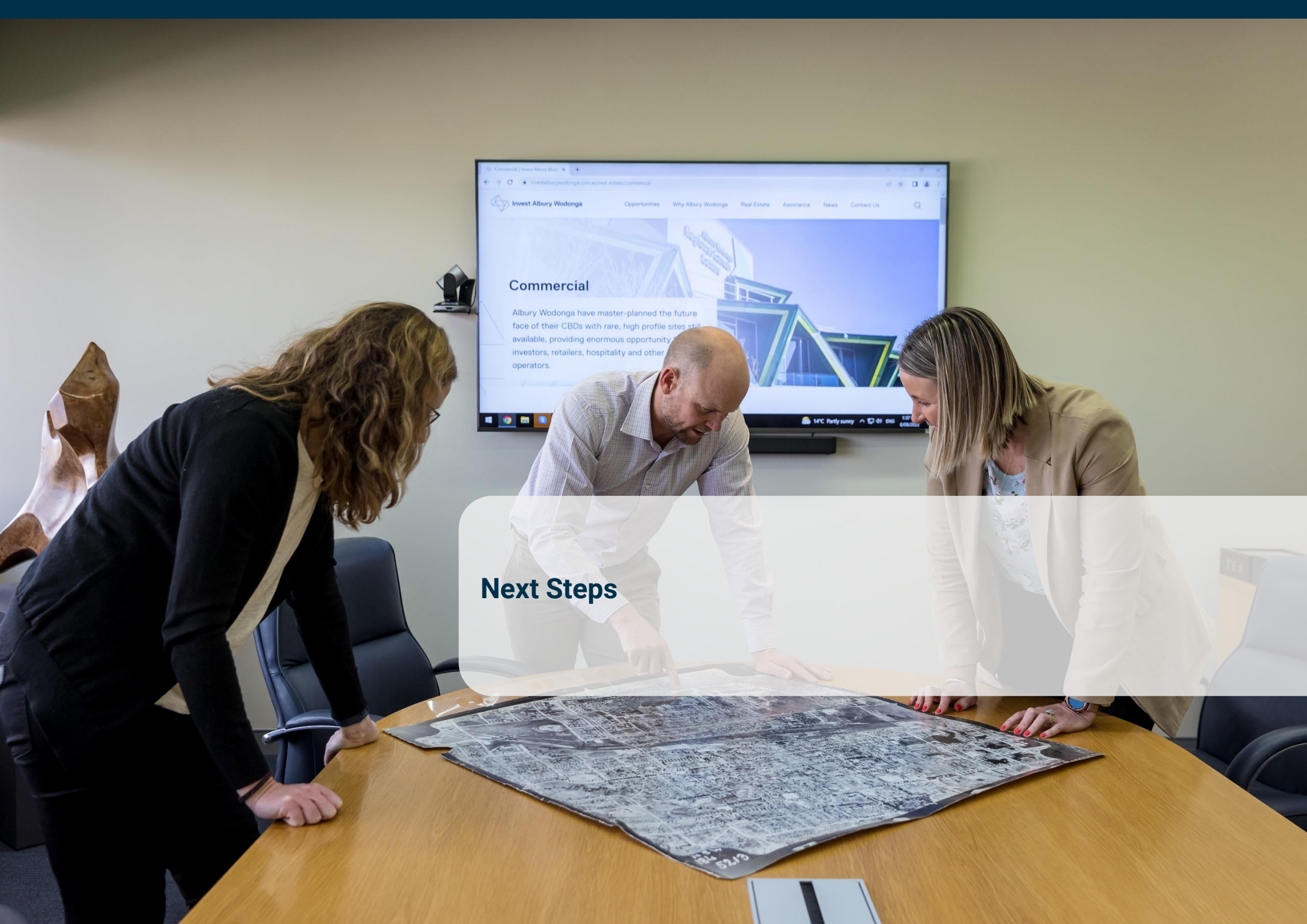
- Create strong partnership between industry, education and government.
- Albury Wodonga Health Precinct master plan has been released. The Precinct will provide opportunities for training, research and partnerships.

- Building on the hub and spoke model there is a significant opportunity for infrastructure investment to ensure Albury remain competitive and provides adequate opportunities for work and education to support a growing population.
- Integrating land use and transport planning, Planning for commercial areas, community and essential services in planned and existing growth areas.
- Continue to support industry growth through provision of adequate industrial land with appropriate supporting infrastructure and utilities.
- Reinforce our role as a hub for employment, services, health, education, retail, entertainment, logistics and manufacturing. Identify and celebrate industry specialisation.

As a hub of manufacturing Albury is highly specialised in a number of manufacturing sub-sectors as evidenced by location quotients. Value-added created in beverage, transport equipment and saw mill and paper is three times more specialised in Albury compared to NSW (Appendix K).







## Next Steps

## Next Steps

### Where to from here?

This discussion paper builds on work previously undertaken through a range of other Council projects and will be used to inform stakeholder engagement for the AlburyCity Economic Development Strategy 2023 – 2027.

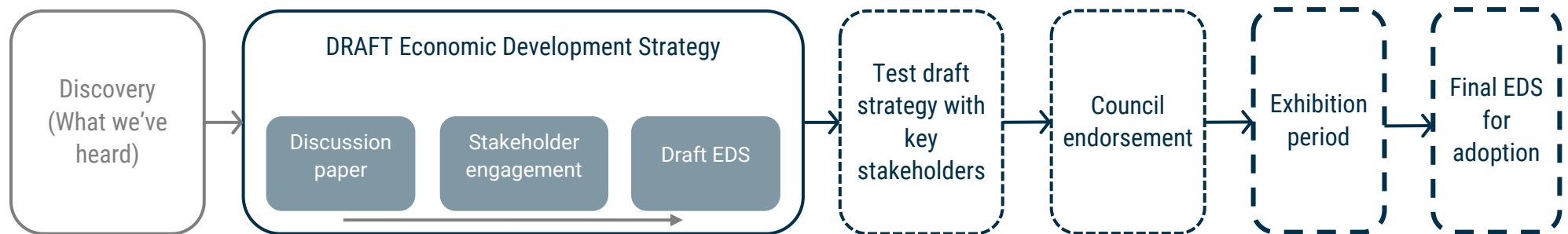
Combined with engagement outcomes and other key policies and strategies, the discussion paper will be used to develop the draft EDS.

Following endorsement by Council, the draft EDS will be available for public comment and feedback over a set exhibition period.

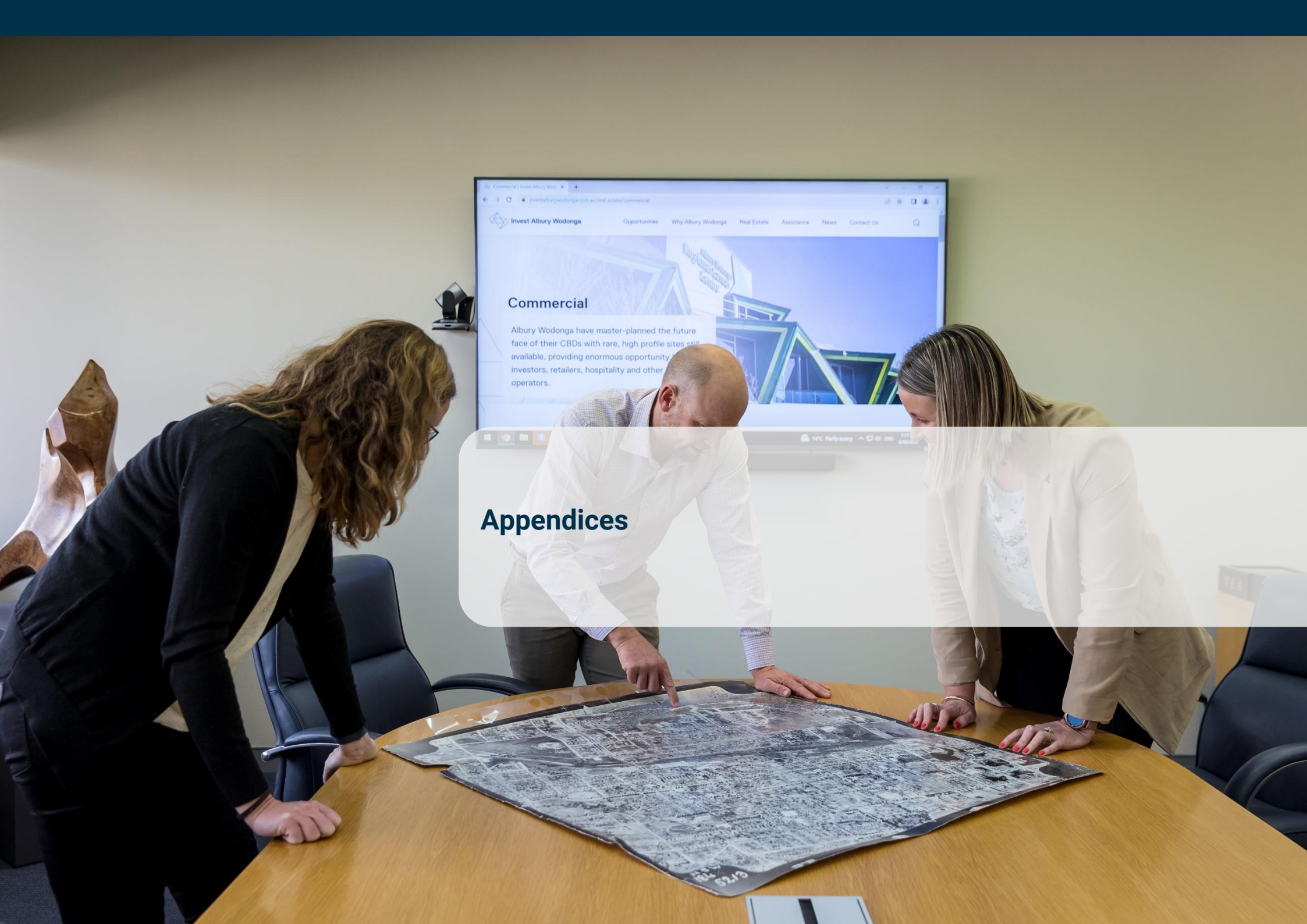
Feedback provided through the exhibition period will then be considered and incorporated into the final EDS.

The final EDS will be a council document, outlining actions where Council can assist the progression of economic development in the region.

As a council document, actions in the final strategy will be confined by the key functions of Council. Council cannot, for example, play the role of industry in economic development. Rather, Council's role will be in assisting to create an environment that is supportive of economic growth and development.







## Appendices

## Appendix A – Historical Economic Performance

### Output (total sales or gross revenue)

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. As such, estimates of output provide an indication of the level of activity occurring in a region, an industry or organisation.

Property services continues to generate the largest value of output (property services includes ‘ownership of dwellings’ which values the provision of housing services by the owner of a dwelling to its occupants, irrespective of whether the owner is also an occupier). Increased construction activity over the past decade has boosted output across the construction sub-sectors, particularly in construction services (i.e., trades) and construction (residential and non-residential building).

Sectors experiencing the largest declines are predominantly within manufacturing. Output from the apparel manufacturing sector has halved from \$151 million in 2012 to \$78 million in 2021. The second largest decline in output occurred in metal & metal product manufacturing which decreased annual output by -\$32 million down to \$331 million.

The decline of the manufacturing sector is occurring across the country. However, the loss of manufacturing not only impacts a region’s productive capacity, but also has flow on effects of reducing the number and variety of professional services and smaller producers that support a manufacturing ecosystem.

Figure A-1 Output trend of top 5 industries in 2021, Albury

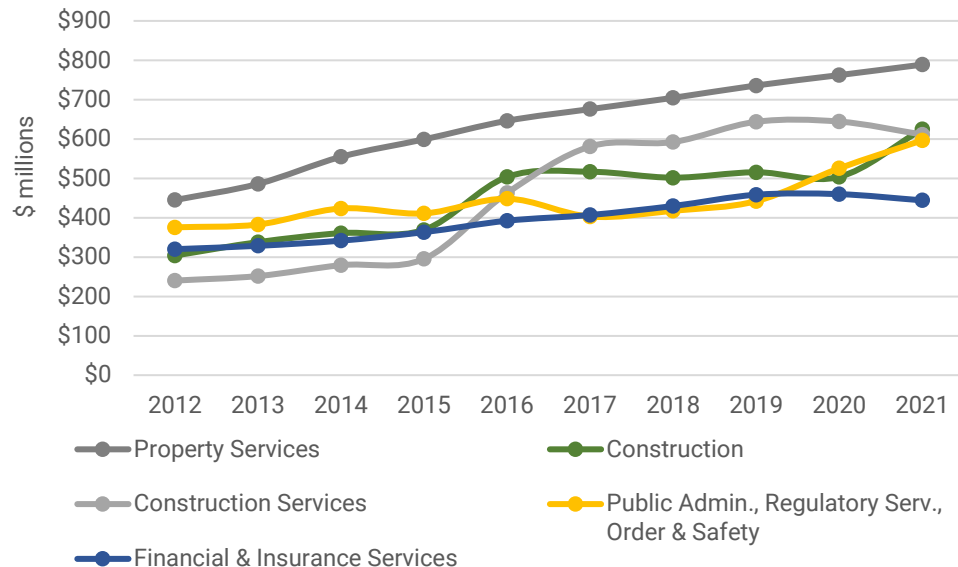
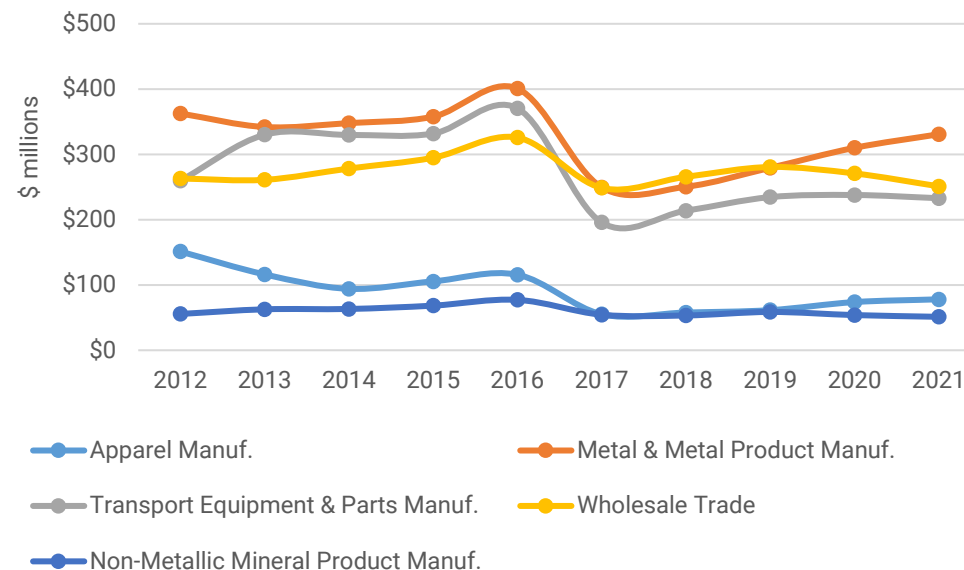


Figure A-2 Output trend of 5 industries experiencing largest decline in output





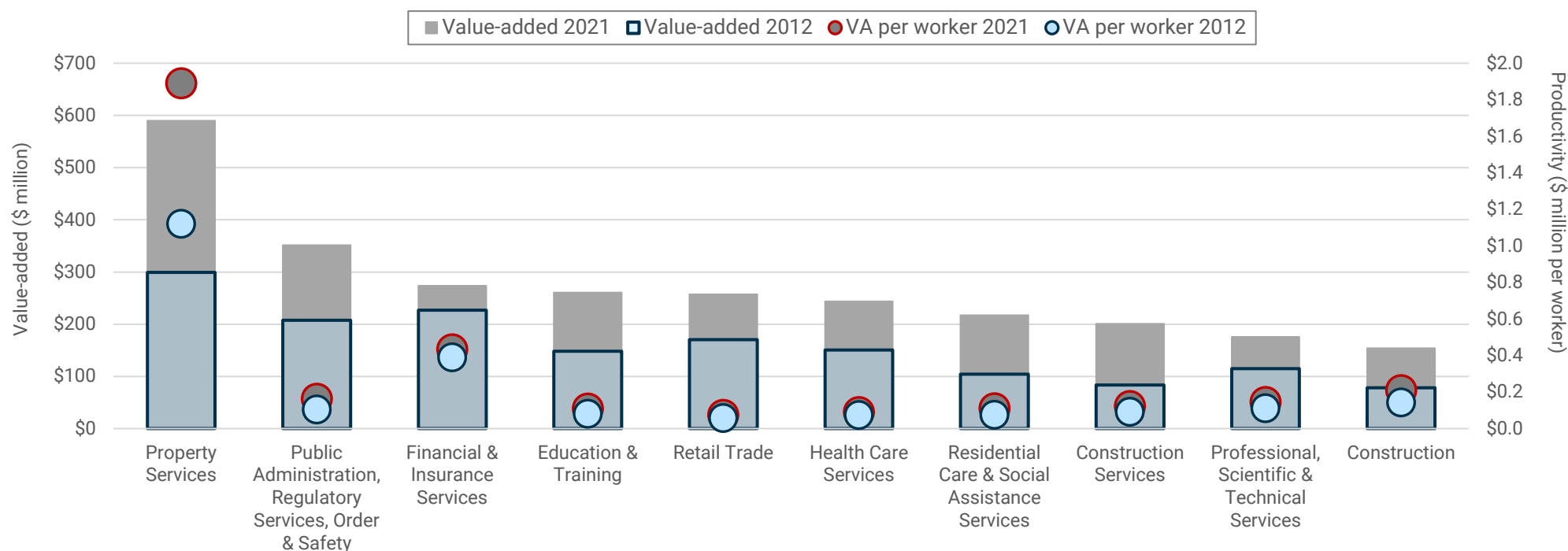
## Value-added (contribution to Gross Regional Product)

Value-added is a key economic metric which estimates the marginal economic value added by an industry. Unlike output, value added is a non-duplicative indicator as it excludes the costs of intermediate inputs. Therefore, it is one of the best indicators of industries' contribution to the wealth of a region. Value-added by industry sector is the major element in the calculation of Gross Regional Product / Gross State Product / Gross Domestic Product.

Property services is the largest contributing sector to regional value-added and in 2012 has the highest value-added per worker. However, the property services industry also includes 'ownership of dwellings' which includes both landlords and owner-occupiers, the latter incorporating imputation of rent which is not an actual transaction but is reflective of property (rental and purchase value) prices in the region.

Several sectors have experienced large increases in the overall contribution to regional value-added including public administration, construction services (i.e. trades), residential care and education. These sectors have achieved growth in value-added due to employment increases rather than increasing worker productivity.

Figure A-3 Top 10 industries contributing to value-added in 2021, change from 2012, and worker productivity



## Appendix B – Supply Chain Gaps

The total expenditure by industry sectors in Albury (C) on goods and services (as inputs into production) is estimated at \$4,622.2 million. This includes:

- \$2,560.7.0 million of expenditure captured within Albury,
- \$1,252.4 million of expenditure captured in the rest of Australia, and
- \$809.1 million from overseas<sup>1</sup>.

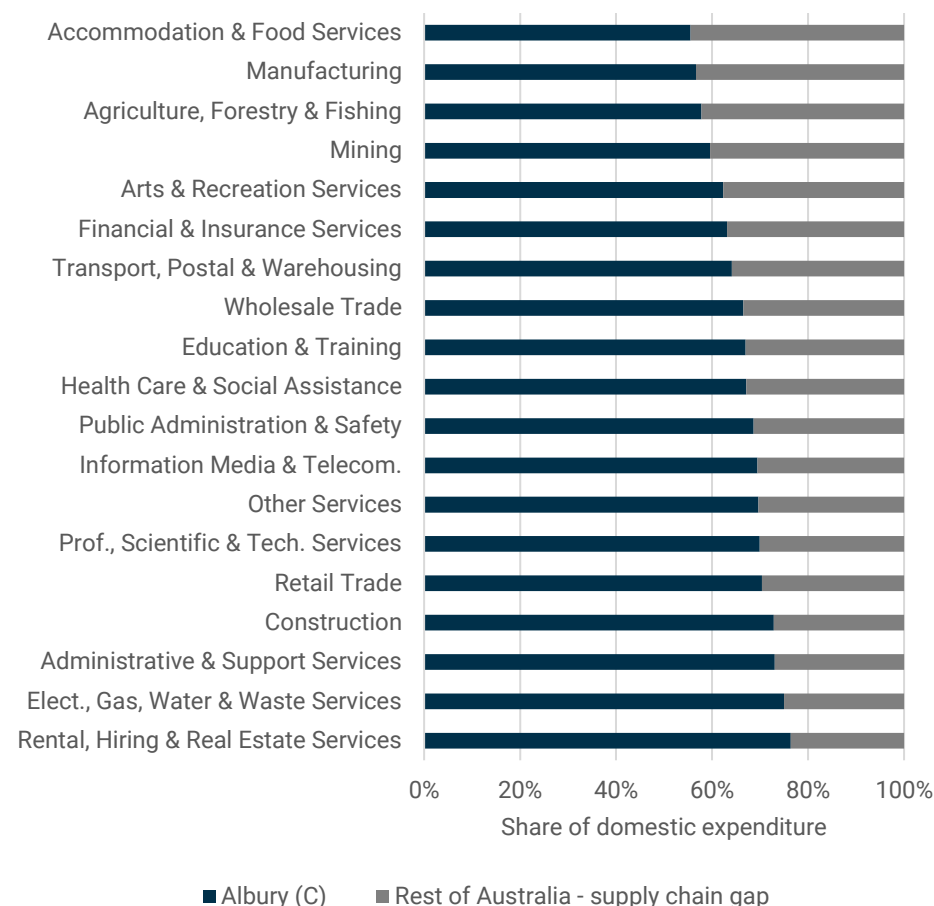
Of the \$1,252.4 million being imported from the rest of Australia, the largest importers include:

- Manufacturing: \$290.5 million
- Construction: \$239.3 million
- Public Administration and Safety: \$79.5 million.

Despite importing the highest value of goods and services, manufacturing spends a higher proportion of domestic expenditure within Albury, i.e., 43% of domestic expenditure is spent on imports from the rest of Australia and the remaining 57% is spent locally within Albury (*Figure B-1*).

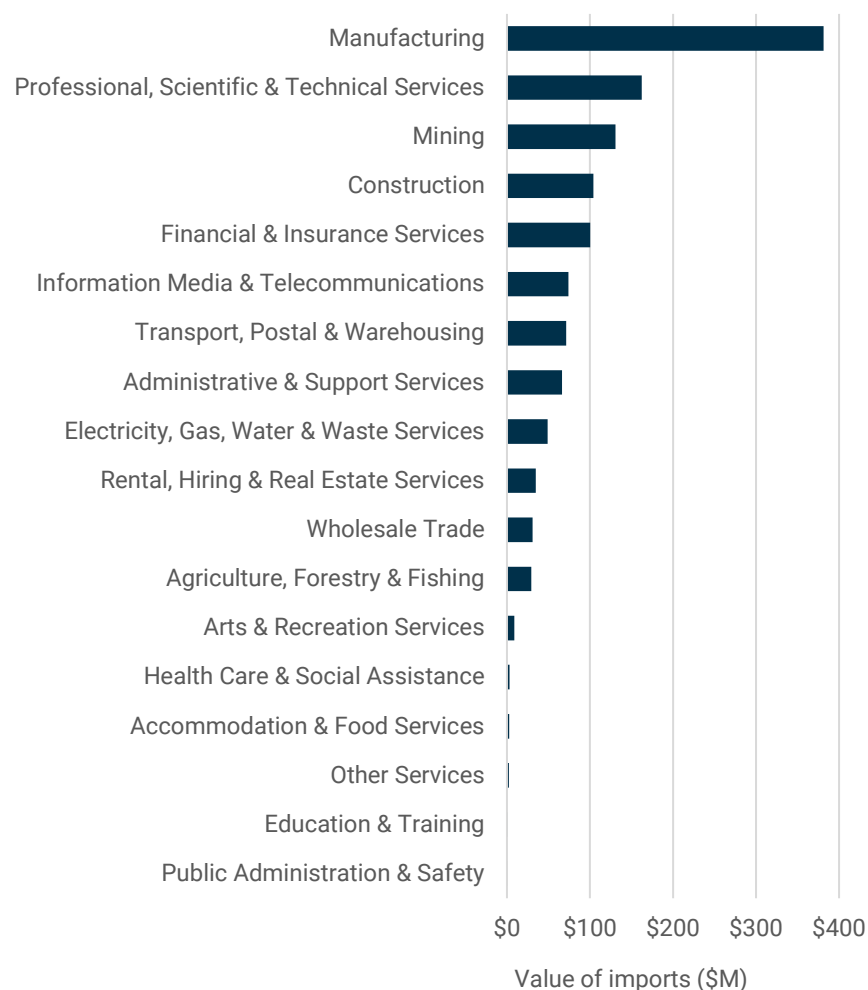
Accommodation and food services spends more on domestic imports than within Albury. Conversely, for the sectors of rental and real estate services, utility services and administrative services a higher proportion of domestic expenditure is captured locally (within Albury) than is capture in the rest of Australia.

*Figure B-1 Domestic expenditure (supply chain gap)*



<sup>1</sup> REMPLAN Economy,

Figure B-2 What is being imported?



Total domestic imports, or escape expenditure, for Albury is estimated at \$1,252.4 million. This is the value of goods and services (as inputs into production) being supplied by external (i.e., rest of Australia) industries.

Figure B-2 presents the value of supplied goods and services by industry. For example, the manufacturing sector in the rest of Australia supplies \$381.2 million to a range of industries in Albury (primarily manufacturing and construction).

Professional services supply \$162.4 million in goods and services to local industry the largest being financial services, public administration and professional services.

## Appendix C – Business Trends

There are an estimated 4,700 businesses operating in Albury, more than half (56%) of which are non-employing. Businesses with an employee base of up to 19 account for 42% of businesses, while businesses employing 20 or more employees account for 3% of all businesses<sup>xxii</sup>.

One in five businesses in Albury operate within construction (1,137 businesses or 20%) account for the largest proportion of businesses in Albury. Businesses operating in professional services, health care and transport numbered in excess of 500 as at June 2022<sup>xxiii</sup>.

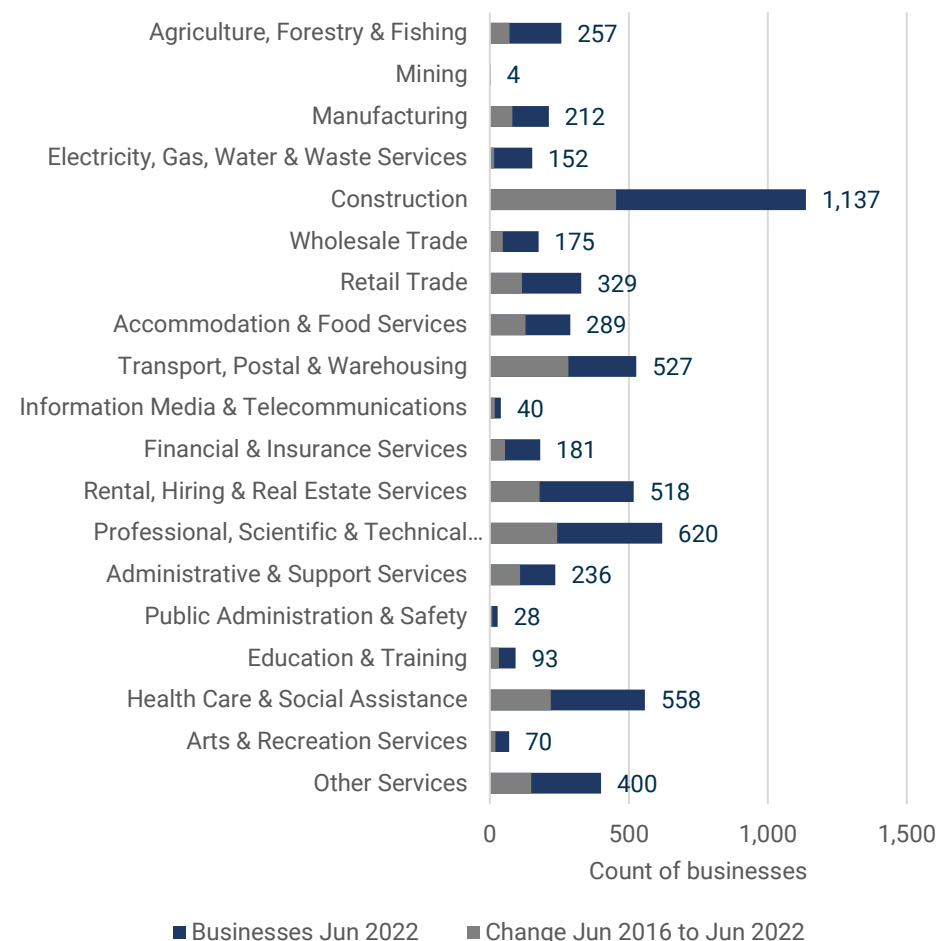
In terms of change since 2016, construction has undergone the highest increase (450 new businesses), followed by:

- Transport, Postal & Warehousing: 283 businesses,
- Professional, Scientific & Technical Services: 242 businesses, and
- Health Care & Social Assistance: 219 businesses.

In fact all industry groups experienced growth in the count of businesses. The slower growth occurred in:

- Mining: 1 new business,
- Public Administration & Safety: 9 new business, and
- Electricity, Gas, Water & Waste Services: 16 new businesses.

Figure C-1 Trend in business registrations





## Appendix D – Workforce

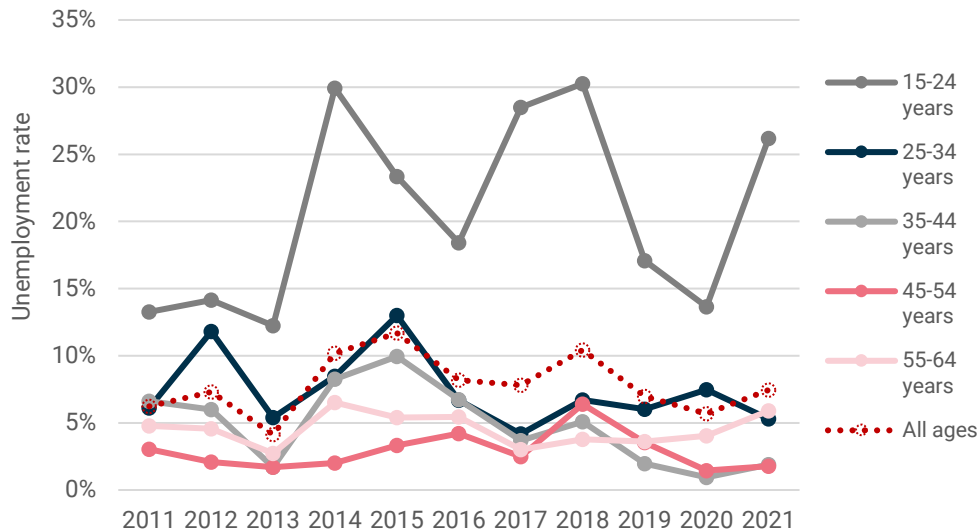
### Unemployment rate

The unemployment rate in Albury (LGA) has fallen since 2015 when it reached 12%, falling to a low of 6% in 2020.

The rate of unemployment across the working ages generally follows the LGA average however there is a high rate of volatility for workers aged 15-24 years. In 2018 unemployment for 15-24 years reached 30% (three times higher than the LGA average), in 2021 youth unemployment (26%) remains more than three times higher than the LGA average (7%).

The more established working age groups of 45-64 report a stable rate of unemployment, well below the average for the LGA.

Figure D-1 Unemployment rate by age group, Albury



### Labour force

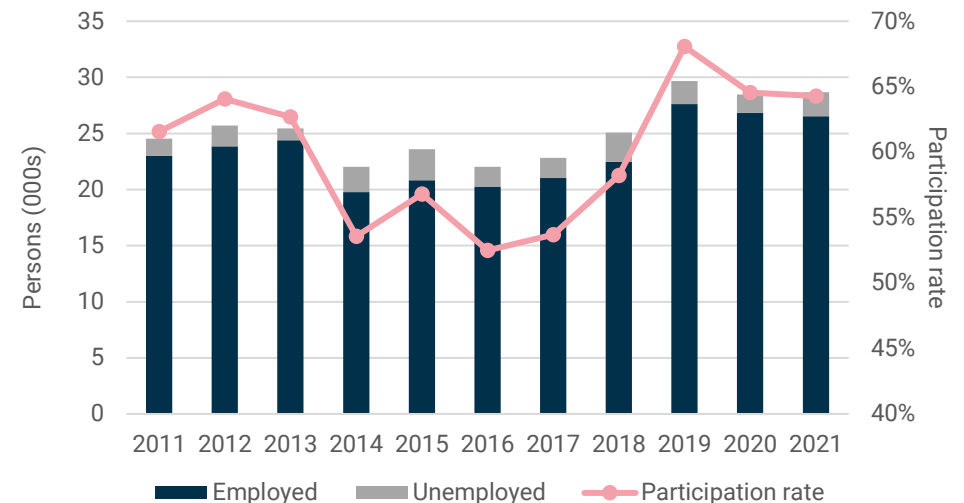
A labour force includes employed and unemployed residents. The labour force estimate for Albury is 26,500 persons as of 2022.

Between 2012 and 2021 the total number of employed people increased by 2,700 while the number of unemployed in Albury increased by just 260. In total, the labour force increased by 2,960 (12%) people in the period between 2012 and 2021.

Prior to the onset of COVID-19, more residents were participating in the labour force with the participation rate reaching 68% in 2019, this has since fallen to 64% in 2021.

All labour force indicators reflect the slowing economic activity experienced during 2020 and 2021 as a result of COVID-19 restrictions, however, all indicators remain at levels higher than experienced over the past 10 years.

Figure D-2 Labour force composition



# Appendices

## Employment by industry

The latest employment estimates demonstrate the importance of population servicing industries such as health care, retail, education and public administration (Figure D-3). However, education and retail have also undergone the largest contraction in jobs since 2020.

Conversely the highest growth in job numbers since 2020 has occurred in administrative services and construction (admin services also includes employment services therefore the jobs increase in this sector is likely to be related to construction activity).

Figure D-3 Industry employment, Albury

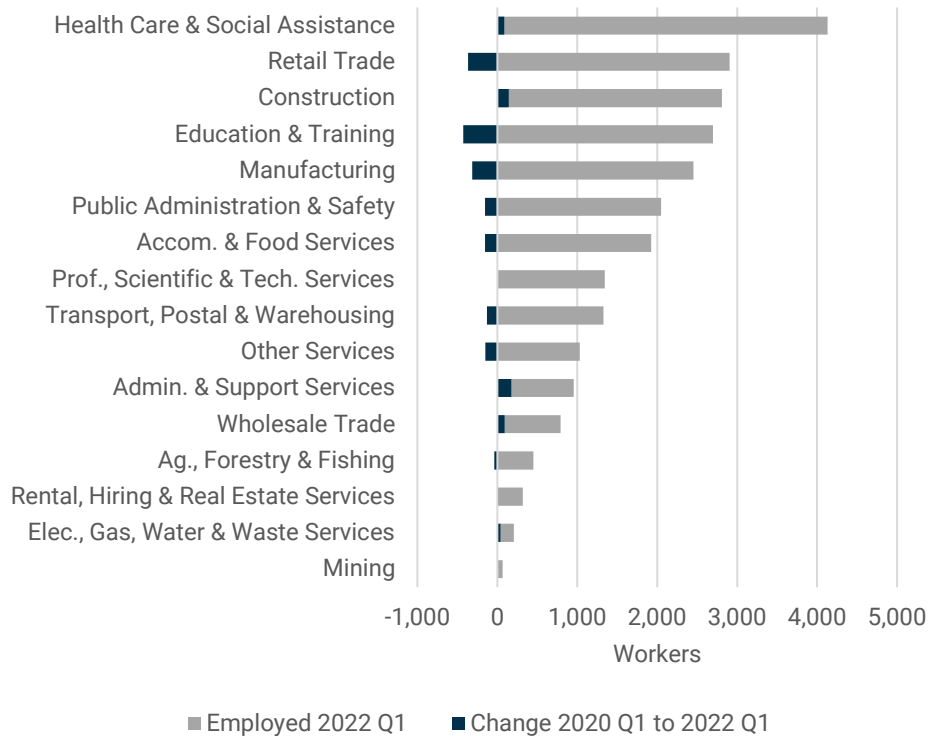
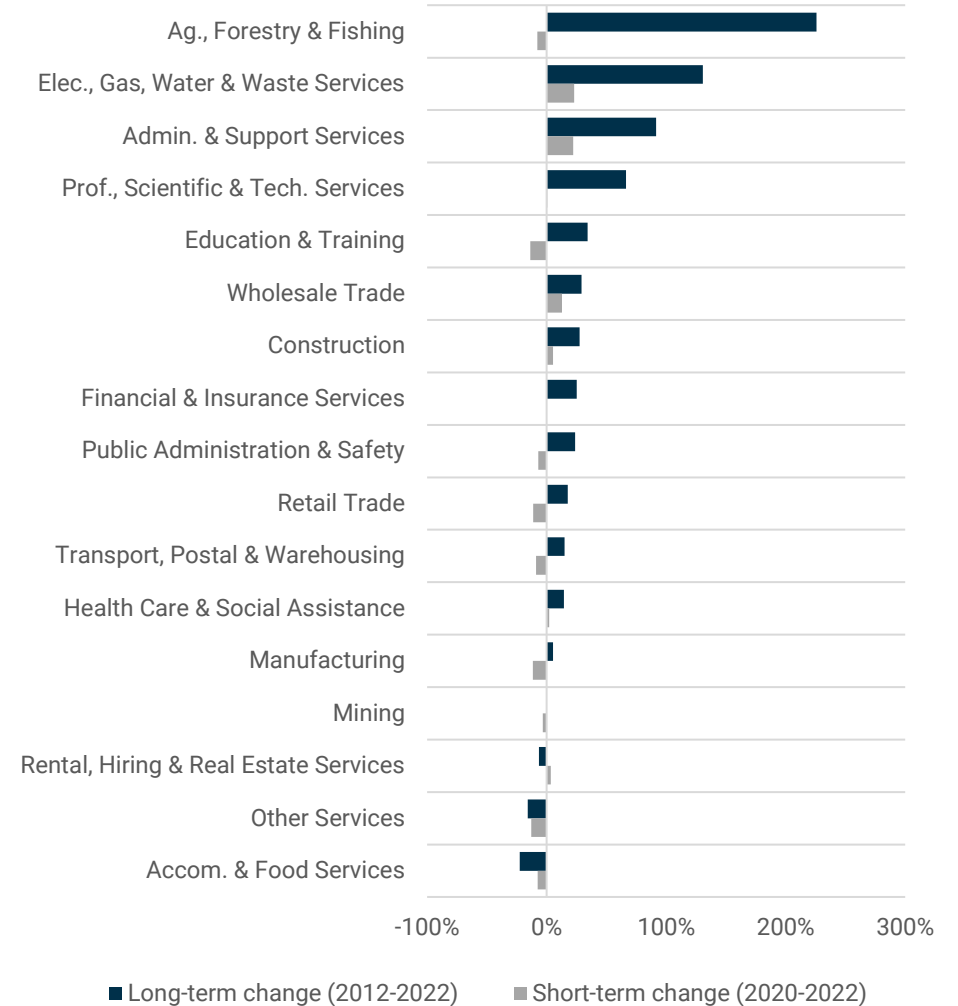


Figure D-4 Industry workforce trends, Albury



## Appendix E – Community Indicators

Figure E-1 Community indicators

	Albury (C)	Non-metro NSW <sup>a</sup>	NSW
<b>Community strength</b>	<i>(rate per 100)</i>		
Persons (18+) who did unpaid voluntary work in the last year through an organisation	38	34	29
Persons (18+) who can access support in times of crisis from persons outside the household	94	94	93
Persons (18+) who felt very safe/safe walking alone in local area after dark	49	56	53
Persons (18+) who in the past 12 months, felt that they had experienced discrimination or have been treated unfairly by others	20	19	19
<b>Residential aged care</b>	<i>(rate per 1,000)</i>		
Places per 1,000 population aged 70+	91	74	75
<b>Access to health care professionals</b>	<i>(rate per 100,000)</i>		
General medical practitioners	114	126	122
Specialist medical practitioners	223	108	146
Midwives	27	99	83
Registered nurses	1,571	1,022	961
Dental practitioners	98	66	91

Note: a) NSW excluding Greater Sydney

Source: 2022 PHIDU, Torrens University Australia.

Figure E-2 Income Support

	Albury (C)	Non-metro NSW <sup>a</sup>	NSW
Age Pension (share of persons aged 65+)	67%	66%	59%
Disability Support Pension (share of persons aged 15-64)	7%	7%	5%
Low income, welfare-dependent families (with children)	7%	6%	5%
Unemployment benefit (share of persons aged 15-64)	9%	8%	6%
Young persons receiving an unemployment benefit (share of persons aged 16-21)	10%	8%	5%
Persons receiving short-term unemployment benefit (share of persons aged 15-64)	1%	1%	1%
Persons receiving long-term unemployment benefit (share of persons aged 15-64)	8%	7%	6%

Note: a) NSW excluding Greater Sydney

## Appendix F – Community Wealth Building

### **Community Wealth Building**

Traditional measures of economic development that rely principally on investment attraction and population growth can have a limited impact on a community if the profits are not retained and recirculated locally.

Community Wealth Building (CWB) is a framework for economic development that aims to retain and distribute wealth within an area create an inclusive, sustainable economy. It does so by localising economic development initiatives, embedded community ownership, which in turn generates outcomes such as social issues prevalent in local areas with collective wellbeing and local resilience<sup>2</sup>.

The purpose of CWB is to influence the structure of the local economy via diversification of business and asset ownership which in turn impacts the distribution of capital and wealth within the local community<sup>3</sup>. It does so via a focus on market opportunities for the community, integrated local supply chains, reduced logistic costs and other economic leakages, and improved business intelligence that increase local industry efficiency and productivity.

### **Five Pillars of Community Wealth Building**

The CWB approach to economic development is built on five principles<sup>3</sup>. Each principle can be considered singularly whilst also being integrated together in a way that multiple benefits and outcomes arising from each action.

**Building the generative economy:** Establishing enterprises with diverse, local ownership models supports the retention of profits within the economy and community whilst simultaneously diversifying the cohort of business leaders and influential voices.

**Progressive procurement:** Maximising local expenditure within the economy to deliver economic, social, and environmental benefits as new enterprise are established, local jobs are created, and alternative business models are encouraged. The multiplier effects throughout the economy are maximised as local supply chains are engaged which support additional economic, social, cultural, and environmental outcomes.

**Employment:** Prevailing economic issues generated by labour force factors are addressed by the key institutions and markets that require workers by encouraging and enabling organisations to commit and act on local investments and supply chain procurement.

**Land and property:** Local ownership of land and assets that generate wealth and distribute capital ownership will also be accessed and controlled by the same community that owns them. This places a focus on the issues of equity and how the public good is optimised.

**Finance:** Where access to capital via institutions are restricted, harnessing the capital from within the community can facilitate investment by locals that benefit from ongoing financial returns, along with economic, social, cultural, and environmental outcomes for the community.

<sup>2</sup> Centre for Local Economic Strategies 2019, *Community Wealth Building 2019 Theory, Practice and Next Steps*

<sup>3</sup> City of Sydney 2021, *Community Wealth Building*



## Appendix G – Economic Benefit of Retaining Young Workers

Prior to 2011, the number of young people aged 15 to 24 in Albury increased annually, consistently representing 8% of the total population. The latest population estimates (2021) indicate 15- to 24-year-olds account for just 6% of Albury's residents and total 6,900 (a decrease of 3% over the year).

To demonstrate the economic benefit of attracting and retaining young residents an impact scenario whereby the proportion of young people in Albury increases from 6% to 8% has been applied to REMPLAN Community Population and Housing Modelling<sup>4</sup>.

The increase in young persons will total 1,503, consisting of 1,117 persons aged 15 to 19 and 387 persons aged 20 to 24. Of these young person's 767 are expected to be working, and 605 would work within Albury across a range of industries (primarily in accommodation, food services and retail) (Figure H-1).

The additional workers would support boost gross revenue being generated and directly boost value-added by an estimated \$64.4 million. From this direct expansion in the economy, flow-on supply-chain effects in terms of local purchases of goods and services are anticipated, and it is estimated that these indirect impacts would result in a further increase to value-added of \$30.2 million.

The increase in direct and indirect activity and employment will increase consumption expenditure being captured within Albury. The consumption effect under this scenario is expected to further boost value-added by \$30.9 million.

Gross Regional Product (GRP) is the total value of final goods and services produced in the region over the period of one year. Under this impact scenario, GRP in Albury (C) is estimated to increase by \$125.5 million.

Figure G-1 Employment impact of increasing population aged 15 to 24 years

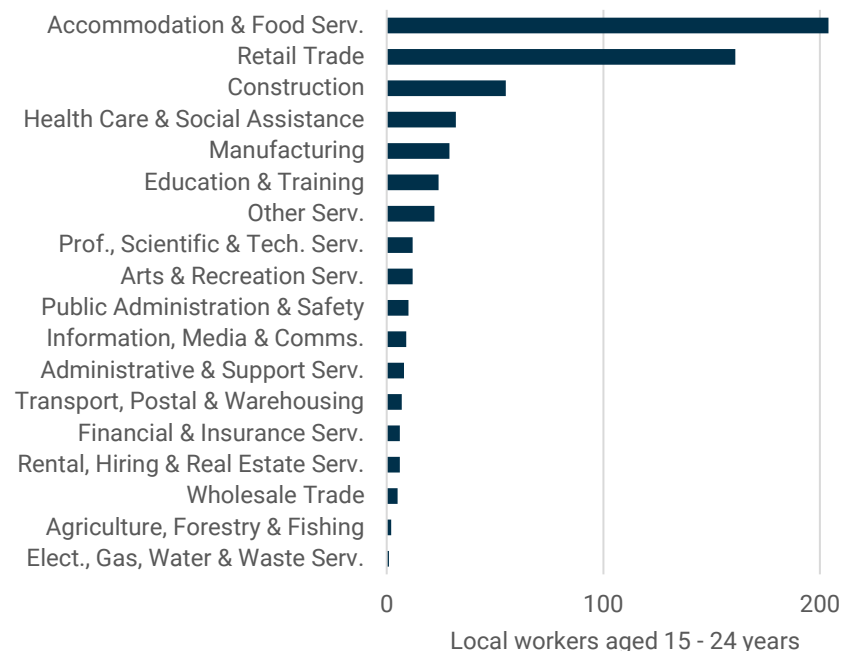


Figure G-2 Summary of economic impact of increasing young resident workers

	Direct effect	Supply chain flow on effect	Consumption flow on effect	Total
Output (\$M)	\$150.4	\$72.3	\$55.6	\$278.3
Employment (Jobs)	605	194	178	977
Value-Added (\$M)	\$64.4	\$30.2	\$30.9	\$125.6

<sup>4</sup> REMPLAN Community Population and Housing Modelling provides insights into region specific impacts of population change on demographic characteristics, housing requirements and the local economy. Modelling is based on Albury (C) specific population and housing data sourced from the ABS 2016 Census.

## Appendix H – Digital Inclusion for Social Equity

The Australian Digital Inclusion Index (ADII) has been created to measure the level of digital inclusion across the Australian population. The ADII uses survey data to measure digital inclusion across three dimensions of Access, Affordability and Digital Abilityxxiv.

Digital inclusion is whether a person can access, afford and have the digital ability to connect and use online technologies effectively.

Nationally the ADII is 71.1 for 2021, up from 67.5 in 2020. The divide between metropolitan and regional areas is marked. In 2021, metropolitan areas recorded an average Index score of 72.9 (1.8 points higher than the national score). Regional areas, however, recorded an Index score of 67.4. This is 3.6 points less than the national score, and 5.5 points less than metropolitan Australia.

As indicated by the adjacent figures, the ADII for Albury (65.1) is 6 points below the NSW average (71.0), this gap has increased between 2020 and 2021. Albury has performed well for digital affordability, with a higher index (94.0) than NSW (91.0). However performed poorly of digital access and ability. Figure H-2 shows a distinct decline in digital ability in Albury between 2020 and 2021.

Maintaining digital ability, through constant development and update of knowledge is crucial to ensure fair and equitable access to online services and opportunities. Digital ability is highly dependent on:

- Age (ability declines with age)
- Education and income (ability improves with higher education and income)
- Family structure (households with children are more digitally able)
- Device use (mobile only users are slightly less digitally able).
- Gender (at the national level, women have slightly lower digital ability score than men, but this pattern is reversed in regional Australia).

Figure H-1 Australian Digital Inclusion Index, NSW, 2021

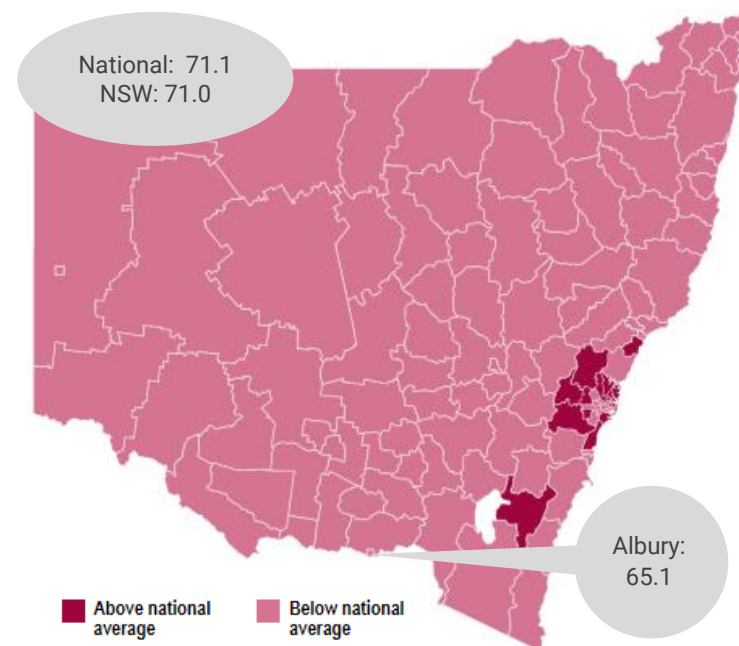
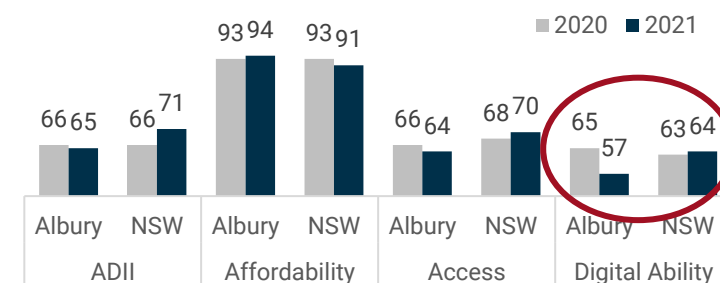


Figure H-2 Digital Inclusion, Albury and NSW



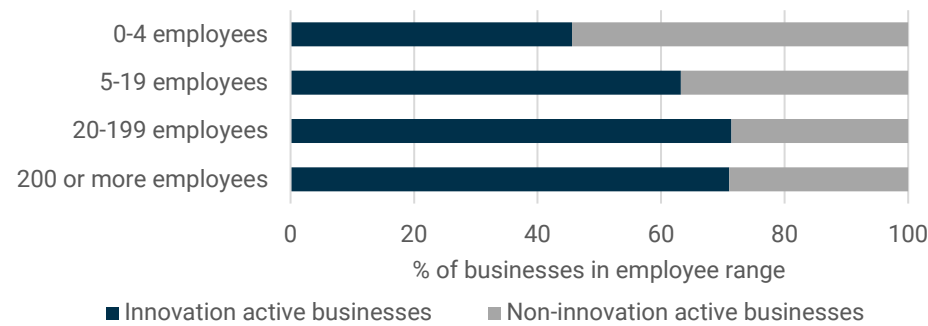
Appendix I – Innovation

Innovation in Australian Business

Innovation is about creating or carrying out new products, processes or devising new applications for existing products and processes. The Australian Bureau of Statistics (ABS) undertakes surveys of businesses to understand, amongst other things, the level of innovation in businesses operations.

Survey data from the ABS<sup>xxv</sup> indicates that large organisations are more likely to innovate than smaller businesses (Figure I-1). Across a range of metrics, larger businesses are generally more collaborative and more innovative.

Figure I-1 Businesses most likely to be actively innovating



For Albury City, this highlights potential barriers to promoting innovation within the business community given the large share of small businesses (businesses employing more than 20 workers represent 3% of all Albury businesses).

Nationally, the most commonly cited barriers to innovation include:

- Lack of access to additional funds.
- Lack of skilled persons within business and the labour market.
- Cost of development or introduction/implementation.
- Uncertain demand for new goods or services.
- Government regulation and compliance.

Two in five of businesses report improvements to customer service, revenue and productivity as key benefits of adopting innovative business practices (Figure I -2). However the benefit likely to accrue is highly dependent on the type of business, for example health care, retail and recreation businesses are more likely to report improved customer service, while mining, agriculture and professional services have experienced increased productivity (Figure I -3).

Figure I -2 Benefits of innovation

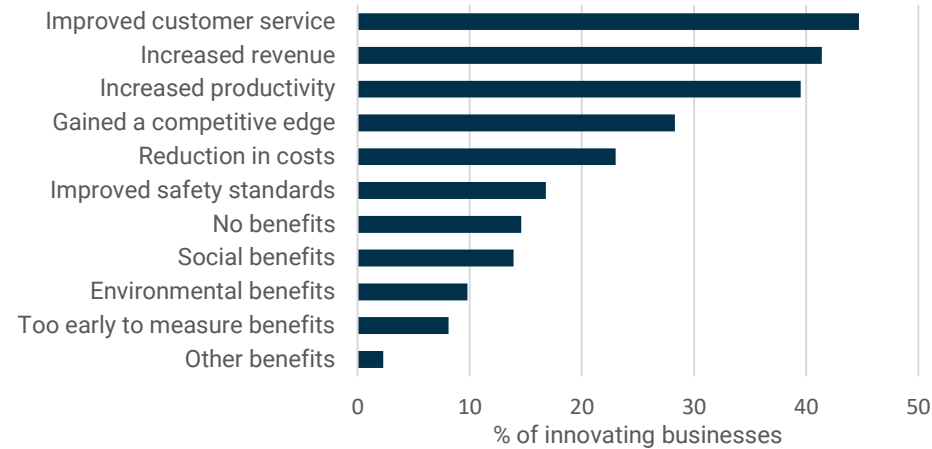


Figure I -3 Industries most likely to benefit

IMPROVED CUSTOMER SERVICES	INCREASED REVENUE	INCREASED PRODUCTIVITY
<ul style="list-style-type: none"><li>• Health Care and Social Assistance</li><li>• Retail Trade</li><li>• Arts and Recreation Services</li></ul>	<ul style="list-style-type: none"><li>• Accommodation and Food Services</li><li>• Wholesale Trade</li><li>• Information Media and Telecommunications</li></ul>	<ul style="list-style-type: none"><li>• Mining</li><li>• Agriculture, Forestry and Fishing</li><li>• Professional, Scientific and Technical Services</li></ul>

## Appendices

More than half of surveyed businesses operating information and telecommunications, professional services, retail and manufacturing reported adopting innovative practices. Of those actively innovating accommodation and food services, wholesale and information and telecommunications are more likely to report increased revenue.

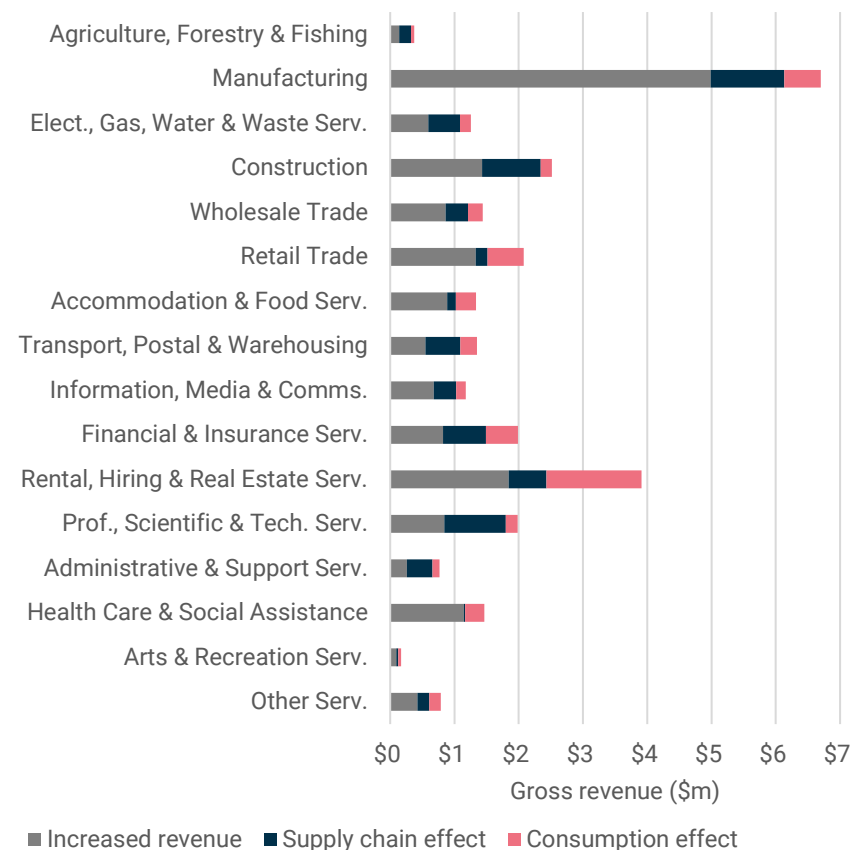
Figure I-4 Innovating businesses benefiting from increased revenue by industries

	% of businesses actively innovating	% of actively innovating businesses reporting increased revenue
Agriculture, Forestry & Fishing	40%	40%
Mining	35%	21%
Manufacturing	60%	51%
Electricity, Gas, Water & Waste Services	50%	49%
Construction	38%	31%
Wholesale Trade	59%	59%
Retail Trade	60%	50%
Accommodation & Food Services	54%	59%
Transport, Postal & Warehousing	43%	32%
Information Media & Telecoms.	62%	58%
Financial and Insurance Services	57%	33%
Rental, Hiring and Real Estate Services	56%	40%
Professional, Scientific & Tech Services	60%	39%
Administrative & Support Services	54%	29%
Health Care & Social Assistance	57%	31%
Arts & Recreation Services	59%	40%
Other Services	50%	45%

### Innovation Impact Scenario in Albury

Should business in Albury adopt the national rate of innovation (Figure I-4) and the same proportion of businesses benefit from increased in revenue, a 1% increase in revenue will yield the following economic impacts across a range of industries.

Figure I-5 Economic impact of innovation induced revenue





## Appendix J – Regional Specialisation

### Location Quotient - workforce

Location quotients are a measure of local industry specialisation compared to larger regions.

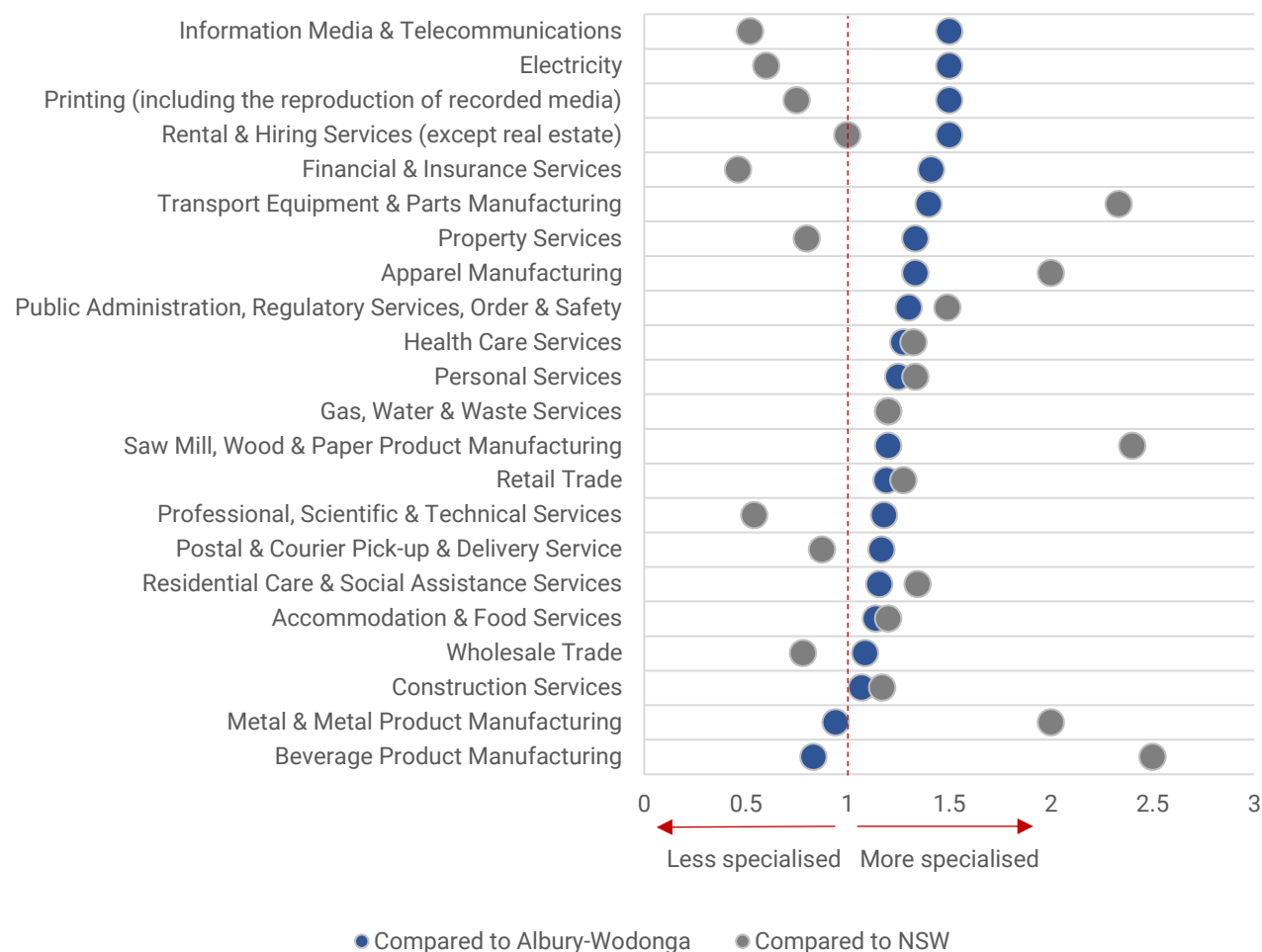
Figure J-1 presents location quotients for Albury compared to the Albury-Wodonga FER, and New South Wales. The location quotients are reflective of workforce specialisation.

The industry-sub sectors represented in the figure are those with a location quotient above 1.1 compared to either geography.

Each of the sub-sectors represents a specialised workforce compared to either Albury-Wodonga or NSW.

The nature of the specialisation is reflective of the regions industry strengths such manufacturing, information media, rental and property services and health care.

Figure J-1 Workforce specialisation (location quotient)



# Appendices

## Location Quotient – industry value-add

Figure J-2 presents location quotients for industry value-add for those sub-sectors that have been identified and highly specialised compared to Albury-Wodonga and New South Wales.

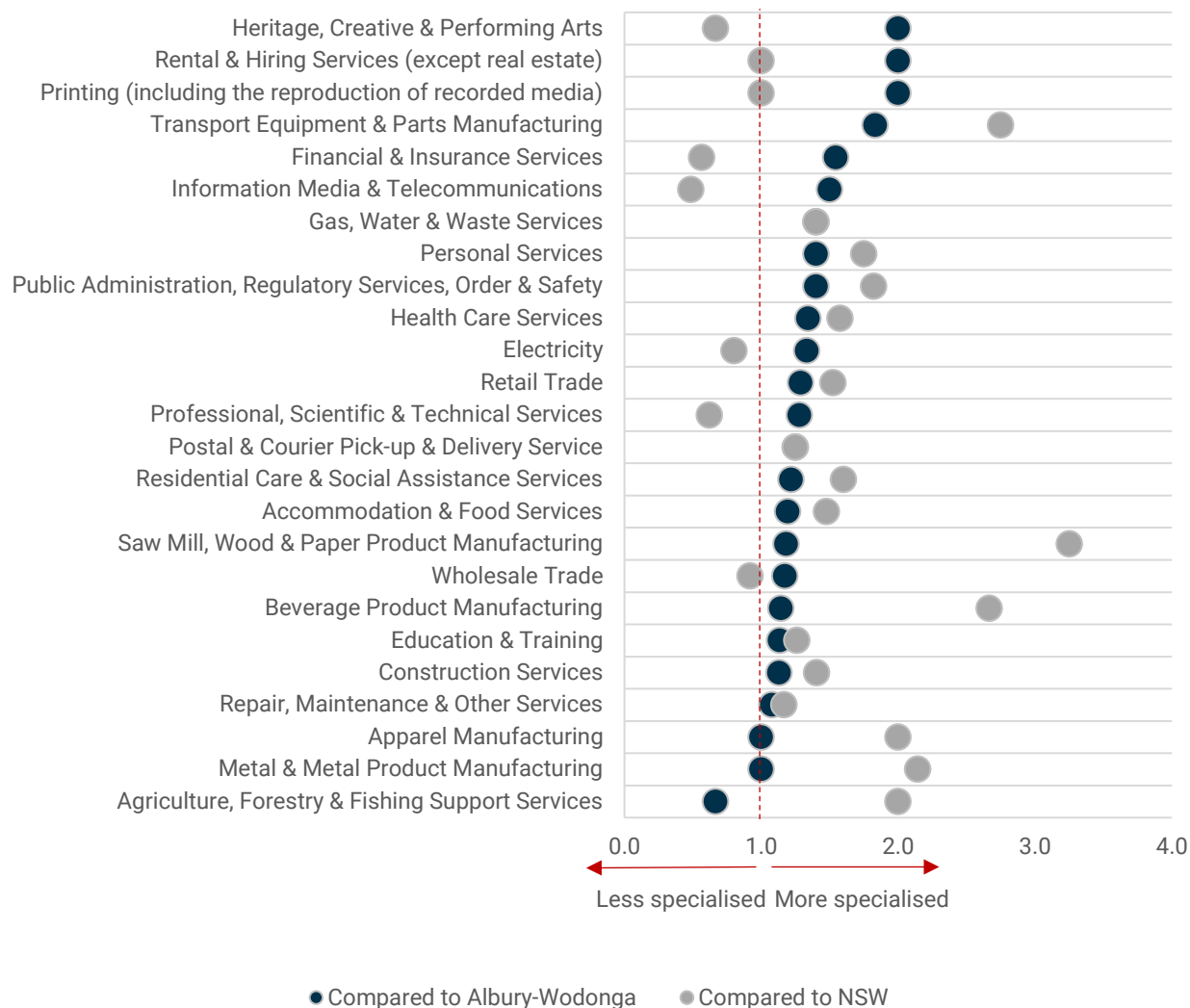
In comparison to the State, Albury is highly specialised in a range of manufacturing sectors including:

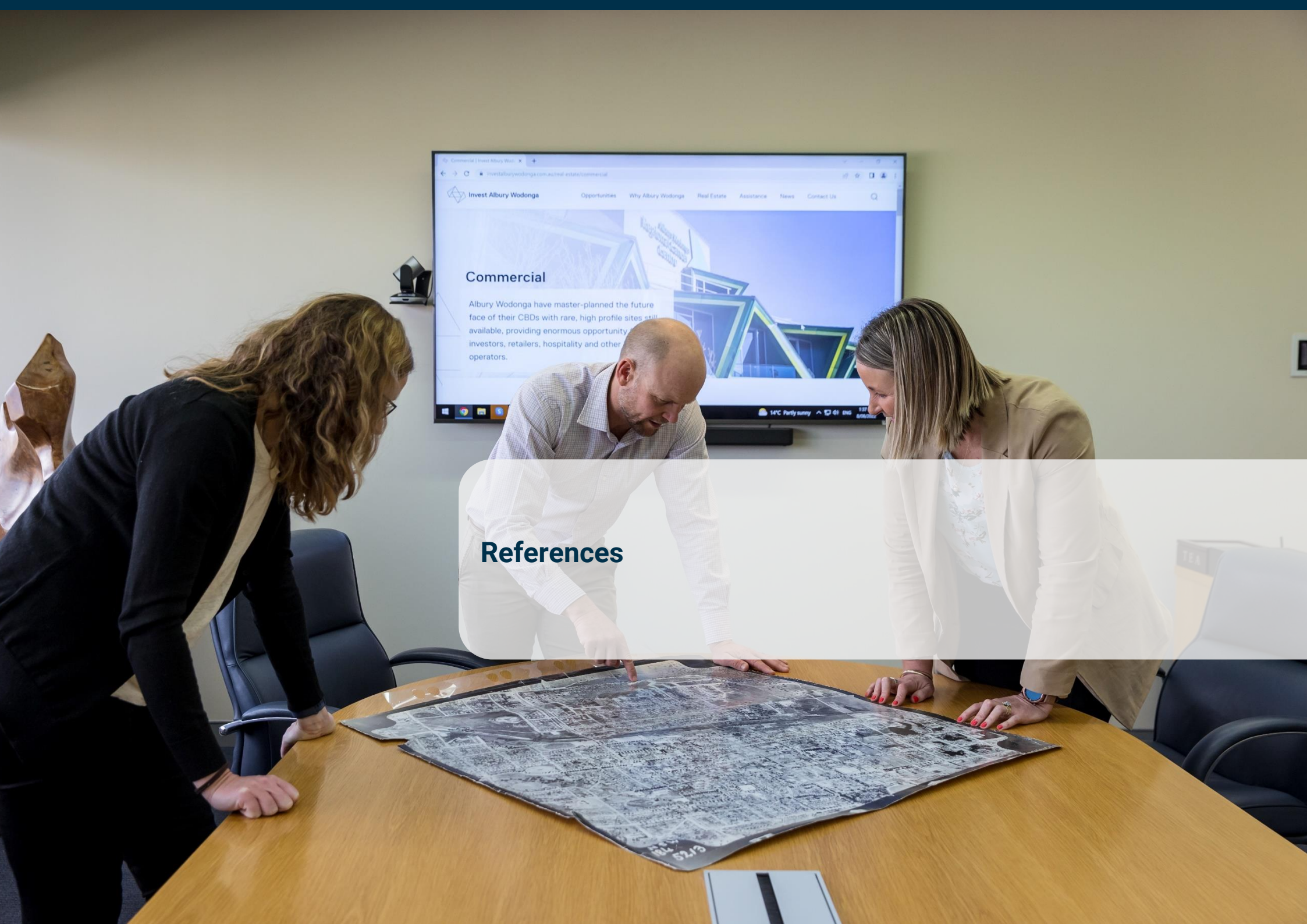
- Saw mill and paper product
- Transport equipment
- Beverage
- Metal product
- Clothing

At a more local level, compared to Albury-Wodonga, Albury is more specialised in:

- Creative arts
- Rental services
- Printing
- Transport equipment
- Financial services

Figure J-2 Industry value add specialisation (location quotient)





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- <sup>i</sup> Centre for Local Economic Strategies 2019, Community Wealth Building 2019 Theory, Practice and Next Steps
- <sup>ii</sup> <http://www.ycdco.com.au>
- <sup>iii</sup> <https://pingala.org.au/>
- <sup>iv</sup> Muswellbrook Shire Council 2021, Future Fund Policy
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- <sup>vi</sup> Department of Infrastructure and Regional Development, submission to Senate Standing Committees on Rural and Regional Affairs and Transport.
- <sup>vii</sup> Advocacy Strategy action: Raise Albury Profile is a "Planned and Proactive Approach" pg 4.
- <sup>viii</sup> Evan Cleave, Godwin Arku, Richard Sadler & Jason Gilliland (2016) The role of place branding in local and regional economic development: bridging the gap between policy and practicality, Regional Studies, Regional Science, 3:1, 207-228, DOI: 10.1080/21681376.2016.1163506
- <sup>ix</sup> NSW Government, A 20-Year Vision for Regional NSW, February 2021
- <sup>x</sup> <https://lgnsw.org.au/Public/Public/Policy/NTECC.aspx>
- <sup>xi</sup> <https://our.wollongong.nsw.gov.au/wollongong-cbd-night-time-economy-policy>
- <sup>xii</sup> <https://intheblack.cpaaustralia.com.au/environment-and-sustainability/circular-economy-how-it-benefits-environment>
- <sup>xiii</sup> <https://dpe.mysocialpinpoint.com.au/plastics-ban-nsw/about>
- <sup>xiv</sup> <https://arena.gov.au/blog/gasifier-treats-sewage-cuts-carbon-emissions-earns-money/#:~:text=The%20Logan%20gasification%20plant%20uses,target%20of%20carbon%20emissions%20neutrality>
- <sup>xv</sup> <https://www.civica.com/en-au/insights/seven-characteristics-of-strong-leaders-in-the-local-authority-of-2025/>
- <sup>xvi</sup> <https://www.oecd.org/cfe/leed/localpartnershipforbettergovernance.htm>
- <sup>xvii</sup> <https://www.sgsep.com.au/publications/insights/three-ways-local-government-can-bolster-affordable-housing>
- <sup>xviii</sup> <https://lgfa.com.au/case-studies/charles-sturt/>
- <sup>xix</sup> <https://www.civica.com/en-au/insights/seven-characteristics-of-strong-leaders-in-the-local-authority-of-2025/>

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<sup>xx</sup> <https://www.smallbusiness.nsw.gov.au/get-help/case-study-library/retail-innovation-program>

<sup>xxi</sup> <https://linkdigital.com.au/project/brisbane-city-council/>

<sup>xxii</sup> Australian Bureau of Statistics, Counts of Australian Businesses, including Entries and Exits.

<sup>xxiii</sup> Australian Business Register (data provided by Albury City Council).

<sup>xxiv</sup> Thomas, J., Barraket, J., Parkinson, S., Wilson, C., Holcombe-James, I., Kennedy, J., Mannell, K., Brydon, A. (2021). Australian Digital Inclusion Index: 2021. Melbourne: RMIT, Swinburne University of Technology, and Telstra.

<sup>xxv</sup> Australian Bureau of Statistics, Innovation in Australian Business