



# Scenario Planning for an Innovative Response to the Water Challenge in the Murray Riverina Region

## *Opportunities Assessment*

Regional Development Australia Murray, Regional Development Australia Riverina and Trade & Investment NSW

February 2011

achieve outstanding client success



## Contents

<b>Introduction .....</b>	<b>1</b>
Outputs .....	1
Next steps .....	2
<b>Prioritisation of industry / market areas .....</b>	<b>3</b>
<b>Strategic intent .....</b>	<b>6</b>
Linkages between opportunity areas .....	10
<b>Possible key opportunities .....</b>	<b>13</b>
Possible tourism opportunity .....	13
<b>Proposed opportunity assessment process .....</b>	<b>17</b>

## Document history and status

Revision	Date issued	Reviewed by	Approved by	Date approved	Revision type
Draft for discussion	17-2-2011	Craig Clifton	David Cotterill	15-2-11	

## Distribution of copies

Revision	Copy no	Quantity	Issued to
Draft	Email Copy	1 but for circulation to Project SC	Barbara Hull

<b>Printed:</b>	28 August 2011
<b>Last saved:</b>	28 August 2011 08:51 PM
<b>File name:</b>	I:\SBIF\Projects\SB19188\Technical\04 Options analysis & scenario planning\20110217_RDA Opportunities Assessment.docx
<b>Author:</b>	David Cotterill
<b>Project manager:</b>	David Cotterill
<b>Name of organisation:</b>	RDA Murray and RDA Riverina
<b>Name of project:</b>	Regional Development Murray and Regional Development Riverina
<b>Name of document:</b>	Options Assessment
<b>Document version:</b>	Draft
<b>Project number:</b>	SB19188

## Introduction

Sinclair Knight Merz (SKM) was commissioned by RDA Murray on behalf of the RDAs of Murray and Riverina to undertake the Trade & Investment NSW (T&I NSW) funded project to develop an innovative, robust and sustainable response to the water challenge in the Murray-Riverina region.

The project comprises six main stages:

- Project Start Up
- Existing Situation Analysis
- Industry/Market Assessment
- **Options Analysis / Scenario Planning**
- Business Case Development
- Delivery Strategy

Despite the recent floods, long term climate averages and projections suggest that lower and less reliable rainfall is likely in the region, and increasing numbers of more extreme weather events are likely. The need for a more broadly resilient economic structure is even more relevant in the current situation.

## Outputs

This project is designed to provide indicative but objective and evidence-based “business cases” for a short list of practical and sustainable development opportunities which justify the provision of investment based on clear on-going benefits to investors, including net financial,

economic, social and/or environmental benefits. The overall output provides clear “line of sight” from a whole of government policy intent (NSW State Plan), departmental/sector specific industry policy to tangible economic outcomes for the region as a result of investment into regional programs to support a transition to a “diversified regional economy”.

A number of key information papers and reports (deliverables) are to be developed at each stage of the study. These deliverables will be reviewed and amended/augmented as required and form the basis of the chapters of the final study report.

This report represents the third key deliverable of the project and includes an initial prioritisation, short listing and assessment of the industry/market opportunities identified in the Industry/ Market Assessment report. It:

- Discusses the industry market areas identified and prioritises them on the basis of agreed criteria
- Looks at the strategic objectives and potential outcomes each offers at a regional level
- Proposes a process to develop potential opportunities designed to develop these sectors further to expand their current markets and develop new ones
- Proposes a process to develop potential new activities that could provide new development opportunities and/or address specific gaps in the market.

In addition to providing a prioritised short list of key opportunities the process proposed will document a longer list of potential opportunities

across other industry market sectors that could provide a development program for the future.

## Next steps

The short listed opportunities will be “tested” to determine:

- The level of benefit they offer the region, economic, social and environmental
- Their practicality and ease of implementation including time and cost
- The spread of benefit across the region
- Support within the regions including potential partners and “champions”
- Their resilience/sustainability in terms of potential climate change, market forces and increased costs of factors of production.

## Prioritisation of Industry / Market Areas

The discussion with the Project Steering Committee on the 31<sup>st</sup> January 2011 identified eleven industry/market sectors as follows:

- Tourism
- NBN enabled including health and professional services
- Manufacturing
- Transport and logistics
- Defence and aviation
- Education and innovation
- Environmental Management
- Energy,
- Extractive industries
- Agriculture, forestry and natural resources
- Emissions trading (carbon price) enabled –this included carbon sequestration and similar carbon reduction opportunities but also included plantings and revegetation to improve on-farm

productivity. This area should kick on with the added incentive of additional funding from ET or other carbon reduction scheme.

The list had some overlap and was refined slightly. In addition, the provision of social infrastructure was recognised as being an enabler for opportunities in many if not most of the industry/market areas as well as being an opportunity in its own right in some circumstances. On this basis social infrastructure was included as an opportunity area in its own right.

Consideration was given to criteria to prioritise these areas. It was suggested categorising them simply on the basis of:

- Return/impact- economic, social and environmental
- Speed/ease of implementation
- Spread of benefit across the region
- Ability to operate in, or compensate for, a water constrained future.

The above opportunity areas are assessed on the basis of these criteria in Table 1 below. The opportunity area headings have been amended or changed slightly to reflect the intent better.

The classifications are scored with a tick if the opportunity area broadly complies or should provide a beneficial outcome, a cross if not and a question mark if unknown or more equivocal. A question mark may be annotated such as “case specific” if the benefit relates to a very specific opportunity or other annotation as appropriate.

Table 1: Opportunity Area Classification

Opportunity Area	Return/Impact	Speed / Ease of Implementation	Spread of benefit	Handle Water Constraints	Priority
<b>Tourism</b>	✓	✓	✓	✓	Yes
<b>Opportunities enabled by high speed broadband including health and professional services</b>	✓	✓	✓	✓	Yes
<b>Manufacturing</b>	? Case specific	? Case specific	? Unlikely unless opportunity replicable across the region	? Case specific - However, unlikely to go ahead unless it can meet this criterion.	No, but look for specialist niche opportunities and for existing operations that can be expanded or replicated in other areas of the region
<b>Transport and logistics</b>	✓ Subject to some bundling	? Case specific	✓	✓	Yes
<b>Defence and aviation</b>	✓	✓	X Probably location specific	✓	Monitor and support proposed opportunities. Look for links to other opportunity areas
<b>Education, R&amp;D and Centres of Excellence</b>	✓	✓	✓	✓	Yes
<b>Environmental Management,</b>	✓	?	?	?	Monitor potential for longer term
<b>Extractive industries</b>	✓	?	?	?	Monitor and support proposed opportunities. Look for links to other opportunity areas

Opportunity Area	Return/Impact	Speed / Ease of Implementation	Spread of benefit	Handle Water Constraints	Priority
<b>Energy</b>	✓	?	?	?	Monitor and support proposed opportunities. Look for links to other opportunity areas
<b>Agriculture, forestry and natural resources</b>	✓	✓	✓	✓	Yes
<b>Opportunities enabled or brought forward by a carbon price</b>	? Potential for substantial benefits across opportunity sectors depending on form of price and speed of implementation	?	?	?	Monitor and support proposed opportunities. Look for links to other opportunity areas
<b>Social Infrastructure</b>	Potentially a broad enabler of above opportunity areas				Monitoring and advocacy

Based on this simple assessment the following five proposed priority areas were identified:

- Tourism
- Opportunities enabled or expanded by access to high speed broadband
- Education, R&D and centres of excellence
- Agriculture, forestry and natural resources
- Transport and logistics.

The other areas offer opportunities but as these are likely to be longer term they will be documented as part of a future development program.

## Strategic Intent

In considering developing key regional opportunities within the prioritised industry/market areas, we propose that opportunities should be strategic and offer a range of benefits across the region. They can and perhaps should build on specific facility suggestions but as a basis for implementing a broader and strategic regional opportunity. While there are others, this is one way of developing specific industry/market opportunities where the specific suggestion is a sub-set or enabler of the broader industry/market opportunity. For example a set of specific transport infrastructure proposals could be looked at as a means to achieving (enabling) the implementation of a regional transport/logistics opportunity. Identifying key arterial roads and their freight loads (origin and destination and tonnes carried) indicates the importance of the

Table 2 suggests a strategic intent for each industry/market opportunity and some possible ways to achieve the objectives. It is envisaged that the

infrastructure. In some cases questions may need to be asked why more obvious routes in terms of directness and/or distance are not used. Having identified these, the opportunity may be to upgrade a range of roads and bridges to enable the most cost effective vehicles usually the largest and most productive to use the most direct route at the optimum speed, hence reducing transport cost and improving regional productivity and profitability. This opportunity would in many cases need to link into regional intermodal hubs to ensure access to the most effective transport mode based on appropriate consolidation, handling and storage etc.

This approach could provide a key role for the RDAs as facilitators and coordinators of the bigger picture regional development.

priority opportunities will include some mix and match of these types of activities and in addition will draw on appropriate specific opportunities identified in the Industry/Market Assessment report. The five priority areas are shaded in blue in the table.

Table 2: Potential Strategic Intent of Identified Industry/Market Opportunities

Market/Industry	Strategic Intent	Examples of Ways to Achieve this
<b>Tourism</b>	<ul style="list-style-type: none"> <li>To attract more visitors who stay longer and spend more per day (More volume and higher yield)</li> <li>To ensure a more even spread of visitors across the region</li> </ul>	<ul style="list-style-type: none"> <li>Improved local and regional data (evidence for planning and action)</li> <li>Selective investment in new and improved social infrastructure</li> <li>Stronger product offering and customer service</li> </ul>

Market/Industry	Strategic Intent	Examples of Ways to Achieve this
		<ul style="list-style-type: none"> <li>■ Better organisation and marketing</li> <li>■ Improved collaboration.</li> </ul>
<p><b>Opportunities enabled by fast broadband</b></p>	<ul style="list-style-type: none"> <li>■ To expand existing and build new businesses and services based around the delivery of increasing speed and capacity of data communications</li> <li>■ To use the high speed broad band capability to provide at least capital City equivalent services in regional areas</li> <li>■ To use access to broad band capability to reverse regional population trends (note overseas experience)</li> </ul>	<ul style="list-style-type: none"> <li>■ Planning and preparing ahead of delivery ensuring maximum attractiveness to potential investors and funders including governments</li> <li>■ Link existing and planned wifi (Countrytel) networks with NBN roll out</li> <li>■ promoting and exploiting new modes of service delivery including e-health and remote provision of professional services</li> <li>■ Providing information and education to regional business to alert them to broadband capability</li> <li>■ Promote broadband capability as part of the region's liveability attraction.</li> </ul>
<p><b>Education, research and centres of excellence</b></p>	<ul style="list-style-type: none"> <li>■ To expand the 'education' sector by:                             <ul style="list-style-type: none"> <li>■ Growing existing and new services based around the delivery of increasing speed and capacity of data communications</li> <li>■ Developing collaborative programs with other institutions and regional industry</li> </ul> </li> <li>■ To build an internationally recognised research base</li> <li>■ To develop existing and establish new appropriate collaborative Centres of Excellence</li> <li>■ To build a regional culture of innovation excellence</li> </ul>	<ul style="list-style-type: none"> <li>■ Align education product and services to attract based on regional advantages</li> <li>■ Develop Centres of Excellence round regional comparative advantage</li> <li>■ Exploit the potential of data speed and capacity in provision of new and expanded learner managed and distance education</li> <li>■ Align research for the betterment of agricultural innovation and excellence in the management of natural resources</li> <li>■ Organise and market to exploit these markets</li> <li>■ Facilitate regional conferences, conventions of meetings related to areas of excellence</li> <li>■ Develop a regional innovation excellence program including encouraging regional researchers and industry representatives to develop papers, development of innovation awards, establishment of innovation fellowships or similar recognition of best practice, etc.</li> </ul>
<p><b>Agriculture forestry and natural resources</b></p>	<ul style="list-style-type: none"> <li>■ To increase the value generated by agriculture and, particularly, increase value generated to the region from agricultural uses of surface water and groundwater resources.</li> <li>■ Reduce risks to existing agricultural land and water uses</li> </ul>	<ul style="list-style-type: none"> <li>■ Identify investment requirements and other activity to maintain/sustain and grow existing businesses and activity and advocate and facilitate relevant developments</li> <li>■ Identify, develop and exploit new markets and new products</li> <li>■ Increase regional value adding to agricultural commodities through food and</li> </ul>

Market/Industry	Strategic Intent	Examples of Ways to Achieve this
	<p>from climate change and changes in water policy and irrigation water availability.</p> <ul style="list-style-type: none"> <li>■ To facilitate the development of innovative practices in agriculture, forestry and natural resources</li> <li>■ To enable market-driven growth in regional forest products industry.</li> <li>■ To encourage the further development and international recognition of the region's agriculture and environmental Centres of Excellence</li> </ul>	<p>fibre processing and tourism or lifestyle linkages</p> <ul style="list-style-type: none"> <li>■ Ensure best practice agriculture, forestry and natural resource management through appropriate research and extension including:</li> <li>■ Encourage land use, water and agriculture and forestry innovation, especially but not only in water efficiency</li> <li>■ Align research for the betterment of agriculture, forestry and natural resources innovation</li> <li>■ Identify, facilitate, recognise and celebrate excellence in agriculture, forestry and the management of natural resources.</li> </ul>
<b>Transport and logistics</b>	<ul style="list-style-type: none"> <li>■ To increase regional productivity and profitability</li> <li>■ To reduce regional transport and logistics costs</li> <li>■ To reduce regional fuel use and greenhouse gas emissions</li> <li>■ To ensure an efficient and safe transport environment</li> </ul>	<ul style="list-style-type: none"> <li>■ Identify key freight routes, linkages with intermodal hubs etc.</li> <li>■ Determine optimal freight routes and reasons for any divergence</li> <li>■ Encourage research into optimal transport modes</li> <li>■ Identify gaps in infrastructure</li> <li>■ Develop a program for investment in transport infrastructure to increase freight and passenger transport efficiency</li> <li>■ Advocate for appropriate regulation for high productivity vehicles</li> <li>■ Increase the attractiveness of the region as a transport interchange and route</li> <li>■ Facilitate investments in appropriate intermodal hub/s.</li> </ul>
<b>Extraction</b>	<ul style="list-style-type: none"> <li>■ To maximise the sustainable development of regional mining and extractive resources</li> <li>■ To expand the economic contribution of these industries to the region</li> </ul>	<ul style="list-style-type: none"> <li>■ Monitor regional prospectivity and promote key resources to appropriate companies</li> <li>■ Create an attractive investment climate to support and entice marginal private sector investment</li> <li>■ Provide facilitation services to assist companies negotiate planning process</li> <li>■ Provide services to maximise local/regional participation.</li> </ul>
<b>Environmental management</b>	<ul style="list-style-type: none"> <li>■ To establish a leadership position in Australia in the efficient management of natural resources for environmental and economic good</li> <li>■ To monitor new environmental management industries and</li> </ul>	<ul style="list-style-type: none"> <li>■ Participate in and prepare for complementary markets and carbon pricing</li> <li>■ Develop a position on the provision of waste management services based on the region's comparative advantage and ability to undertake such activities</li> </ul>

Market/Industry	Strategic Intent	Examples of Ways to Achieve this
	<ul style="list-style-type: none"> <li>position the region to lead their development</li> <li>■ To further the region as an acknowledged clean, green region</li> </ul>	<ul style="list-style-type: none"> <li>■ Monitor the development of new and emerging green industries and disseminate appropriate information</li> <li>■ Facilitate the development of forums to increase the awareness of new and emerging green business opportunities and support their development in the region.</li> </ul>
<b>Defence and air</b>	<ul style="list-style-type: none"> <li>■ To create a climate that supports growth in the defence and air sectors</li> <li>■ To build a nationally significant aviation cluster around the Wagga Wagga defence and aviation training activities</li> </ul>	<ul style="list-style-type: none"> <li>■ Monitor NSW State Government Defence Industry Strategy and support appropriate initiatives to maximise regional benefit</li> <li>■ Enhance social infrastructure to retain the region's attractiveness to ADF personnel</li> <li>■ Work with the Wagga Wagga Aviation Training Academy to develop its capability and attract complementary industry/businesses</li> <li>■ Support private investment in associated defence and air businesses.</li> </ul>
<b>Energy</b>	<ul style="list-style-type: none"> <li>■ To ensure cost effective energy to regional industry and residents</li> <li>■ To be a leader in implementing appropriate energy solutions</li> <li>■ To develop emerging alternative energy opportunities</li> </ul>	<ul style="list-style-type: none"> <li>■ Monitor the potential for renewable energy developments in the region and facilitate/support appropriate developments</li> <li>■ Facilitate the development of and support for private investment in energy supply</li> <li>■ Support enhanced reticulation to underpin private sector investment, likely to mainly relate to natural gas but could include other energy sources</li> <li>■ Facilitate/support the use of agricultural and other biomass, waste or other feed-stocks for both stationary and transport energy/fuel resources where appropriate</li> <li>■ Provide appropriate forums to disseminate information about successful developments that could be introduced to the region or replicated in other parts of the region</li> <li>■ Consider the implications of a carbon price on the feasibility of particular developments.</li> </ul>
<b>Manufacturing</b>	<ul style="list-style-type: none"> <li>■ To broaden the manufacturing base</li> <li>■ To be recognised as a region that supports the manufacturing sector (note linkages with Education and</li> </ul>	<ul style="list-style-type: none"> <li>■ Identify and promote the region's capacity for both value-added manufacturing, new markets and new niche products</li> <li>■ Identify and facilitate the development/attraction of new or expansion of</li> </ul>

Market/Industry	Strategic Intent	Examples of Ways to Achieve this
	research above and agricultural etc. innovation. The aim is to increase recognition of the region for its innovation across all sectors)	existing niche manufacturing businesses <ul style="list-style-type: none"> <li>■ Promote existing business advisory/training services across the region to support existing businesses and assist their growth. Identify any gaps in these service or their geographic coverage and develop/facilitate innovative ways to address these</li> <li>■ Support private investment</li> <li>■ Develop both hard and soft social infrastructure that facilitates manufacturing industry and has economic benefits</li> <li>■ Develop a regional manufacturing excellence awards program.</li> </ul>
<b>Emissions trading opportunities</b>	<ul style="list-style-type: none"> <li>■ To maximise the value from opportunities/assets based on the requirement for a carbon price and the emerging markets in emissions trading</li> <li>■</li> </ul>	<ul style="list-style-type: none"> <li>■ Create awareness in the investor and business communities of the potential of emerging markets and business opportunities based on the introduction of a carbon price</li> <li>■ Identify affected assets and operations and the potential impact</li> <li>■ Advocate for any necessary transition support</li> <li>■ Support excellence in environmental management and innovation (see above).</li> <li>■ Assess opportunities to develop a regional carbon pool to connect farm-based bio-sequestration with carbon markets.</li> </ul>
<b>Social Infrastructure</b>	<ul style="list-style-type: none"> <li>■ <i>To provide social infrastructure to support economic development</i></li> <li>■</li> </ul>	<ul style="list-style-type: none"> <li>■ <i>Prioritise social infrastructure investments having regard to direct and indirect economic benefits and social benefits</i></li> <li>■ <i>Align social infrastructure investment planning with economic development direction</i></li> </ul>

## Linkages between opportunity areas

The opportunity areas above are not independent, many are linked either directly or indirectly. Direct linkages relate to opportunity areas that

provide support for the prime opportunity and are material to its development and success, for example broad band services are involved in the direct provision of some tourism services and material to their effectiveness. Indirect linkages relate to areas that can support other opportunity areas, for example education can improve the capability of tourism operators and assist them in operating successfully. It should be noted that while in most cases these linkages should have a positive

impact, in a few cases the impact may be equivocal or even adverse, for example the potential competition for land between agriculture and extraction uses and the possible conflict with the region's clean green image.

A first cut at the direct (coloured green) and indirect (coloured gold) dependences/interactions between opportunities are shown in the following figure.

Figure 1: Linkages between opportunity areas

	Tourism	Opportunities enabled by fast broadband	Education, research and centres of excellence	Agriculture, forestry and natural Resources	Transport and logistics	Extraction	Environmental management	Defence and air	Energy	Manufacturing	Emissions trading opportunities
Tourism											
Opportunities enabled by fast broadband											
Education, research and centres of excellence											
Agriculture, forestry and natural resources											
Transport and logistics											
Extraction				Potential competition for land and conflict with clean green image.							
Environmental management											
Defence and air											
Energy											
Manufacturing											
Emissions trading opportunities										??	
Social infrastructure											

## Possible Key Opportunities

This section sets out an example of a possible larger regional strategic opportunity for the tourism industry/market sector. The example is provided for discussion and does not include an exhaustive list of possible opportunities based on the long list of more specific opportunities identified to date. The example will be modified based on further work to increase its relevance. Implementation of a large scale opportunity can be staged to allow appropriately sized chunks to be tackled at each stage. Consideration of staging and the timing of implementation will also be considered in the further work.

The key objectives in developing and assessing industry/market sector opportunities are to ensure:

- They meet a regional strategic intent or objective
- Their impact can be measured in terms of relevant measures which for tourism would include additional investment, visitor numbers and nights, incremental expenditure and employment
- They can be implemented including the ability to stage implementation in “bite sized chunks”
- Implementation players and partners can be identified
- The roles of the RDAs and partners can be documented
- Relevant linkages with other areas can be spelled out.

## Possible Tourism Opportunity

A number of tourism opportunities have been identified in the earlier work as well as infrastructure developments that offer additional community amenity but also offer potential to attract visitors and/or encourage existing visitors or travellers through the region to stop either briefly or to stay over-night. Identified tourism opportunities include the development of touring routes and trails, events, promotion of existing themed tours and niche attractions, restoration/upgrading of historical sites, development of additional Indigenous and other cultural tourism experiences and upgrading of caravan sites and parks.

Infrastructure proposals with tourism potential include the upgrade of recreation reserves and parks including new or upgraded toilet facilities and visitor information, development of the river foreshore including in some cases the inclusion of visitor information facilities/services, the development/upgrading of cultural centres and art galleries, upgrading of showgrounds and the upgrade/redevelopment of civic precincts and streetscapes.

The region has a number of touring routes and trails including the successful Long Paddock Trail, a few very successful Indigenous and European heritage attractions that could provide exemplars and a sound base to build on, a range of strong niche markets and has or is aware of some sound and successful community based initiatives. The region is also large and much of the tourism industry comprises many small and micro enterprises operated by owner/managers many of whom are in the industry for lifestyle reasons rather than being fully commercial. The industry and market tends to be fragmented with many operators competing with each other on price rather than working together to develop higher yield collaborative product and packages.

The development of local infrastructure as proposed is unlikely of itself to attract new visitation although it could encourage existing visitors or travellers through the region to stop and possibly to stay for a night. However, again similar development at a number of towns along a main route could lead to competition between facilities with the visitor market split between towns with none of them attracting a critical mass to encourage additional private investment such as quality accommodation and/or food services.

On this basis we propose that the identified regional tourism opportunities should be prioritised and combined on the basis of a regional tourism strategic business plan and collaborative programs

across the region utilising existing and planned facilities, attractions and venues. The approach is designed to broaden the focus of facilities as enablers of a regional approach which could justify collaboration of operators, additional private and community investment/development and provision of the resources to “prove” the benefits of the plan and consequent funding to maintain and upgrade the public and community facilities going forward. The possible opportunity is outlined under the headings noted above in Table 3 below. A key pre-requisite of this regional approach is that investment and activity should be based on sound market research that provides an evidence base for planning and action.

Table 3: Possible Tourism Opportunity

Strategic Intent	Description	Specific Projects Included	RDA Role	Possible Partners	Anticipated Outcomes and performance measures
<p><b>To develop a whole of region approach to tourism development. This should include, as far as possible, the small towns, regional centres and dry land as well as riverine areas.</b></p> <p><b>This approach would draw on the existing regional and local area strategies and plans ensuring issues of gaps and duplication are identified and addressed.</b></p>	<p>Develop and implement a regional tourism strategic business plan including:</p> <ul style="list-style-type: none"> <li>Identification of key attractions and routes by visitation and traffic and origin of visitors</li> <li>Determine current and potential target markets by current and potential attraction</li> <li>Determine visitor service requirements by market</li> <li>Determine infrastructure and service gaps and develop a program to address these</li> <li>Determine infrastructure and service gap provider, e.g. public, community and private sector and prioritise provision</li> <li>Identify regional champions and establish appropriate implementation groups ( these may be based on existing tourism and other relevant regional bodies)</li> </ul> <p>Identify, develop and promote:</p> <ul style="list-style-type: none"> <li>Themed tours, touring routes and trails</li> <li>Niche attractions and experiences</li> <li>Key events</li> <li>Supporting services such as accommodation, food services, transport, visitor information, etc.</li> </ul>	<ul style="list-style-type: none"> <li>Murray River Wagirra Trail</li> <li>Indigenous tourism</li> <li>Murray River Tourism Program</li> <li>Various local area upgrading projects subject to prioritisation based on potential demand</li> <li>Various road and other access projects subject to prioritisation based on potential demand</li> <li>Proposed Art Gallery and other public facility proposals</li> <li>Existing tourism product, infrastructure and marketing collateral.</li> </ul>	<ul style="list-style-type: none"> <li>Advocacy and seeking funds for initial plan</li> <li>Facilitation and coordination of strategy development and initial implementation. Note: implementation is likely to be staged so that initial implementation is only part of the activity in the description column</li> <li>Potentially on-going monitoring and evaluation</li> <li>Facilitation with T&amp;I NSW and Tourism NSW in identifying and developing associated businesses and marketing activity</li> <li>Working with partners to facilitate the development of</li> </ul>	<ul style="list-style-type: none"> <li>Regional and local tourism bodies and key tourism operators</li> <li>LGAs</li> <li>State Government</li> <li>Tourism Research Australia</li> <li>Regional and possibly other education and training bodies</li> <li>Regional and possibly other research bodies including the CRC for Sustainable Tourism</li> <li>Local communities</li> </ul>	<ul style="list-style-type: none"> <li>Development of a broader collaborative tourism framework. Measured by increased collaborative packages and word of mouth promotion by operators</li> <li>Linkage of attractions and venues. Measured by collaborative maps and brochures and level of multiple venue bookings. This could be encouraged through access to combined ticketing or a regional passport approach</li> <li>Increased visitation to region including visitors stopping more often. Measured by visitor numbers and nights, return visits, visitor expenditure etc. Regional surveys that identify places visited and stops as well as overnights similar to Tasmanian data could be useful</li> <li>Improved regional service measured by a regular regional customer satisfaction survey</li> <li>Increased regional research (see above)</li> <li>A Sound framework for tourism infrastructure and service planning and provision at all levels and locations measured by reduced infrastructure gaps and duplication and fewer complaints dealt with</li> </ul>

Strategic Intent	Description	Specific Projects Included	RDA Role	Possible Partners	Anticipated Outcomes and performance measures
	<ul style="list-style-type: none"> <li>■ Establish regional service standards and provide/facilitate provision of training for participating enterprises/ organisations/ other operations</li> <li>■ Identify/establish existing product gaps and facilitate/coordinate activities to address these including identification and support for new business start up</li> <li>■ Encourage development of collaborative products and packages.</li> </ul>		regional events and relevant regional infrastructure.		quickly. Note: assumes a regional QA process including encouraging feedback including complaints by visitors and periodic service audits.

## Proposed Opportunity Assessment Process

The assessment process proposed includes:

- Documentation of all eleven opportunity areas in a similar summary format to the tourism example above but including proposals for staging where relevant. Each will include opportunities identified to date prioritised by importance. This process will aim to provide a potential work program for the future
- Detailed documentation of the early opportunities offered by the five priority areas. This process will include:
  - An **initial abstract of the proposed opportunity** including a brief description, anticipated outcomes/benefits and any required inputs/investment.
  - **Agreement by the project Steering Committee for the proposed opportunities**
  - Additional desk research and consultation to confirm the opportunity and to collate information on the potential costs and benefits
  - **Documentation and agreement for the detailed opportunity** including proposed staging
  - Documentation of an implementation program including implementation funding requirements, proposed sources, any application process including timing, other implementation

and operational resources and estimates of operational costs and benefits.

- Documentation of opportunity implementation and operations partners, responsibilities and timing
- Where appropriate an initial expression of interest/support by participants and partners
- A economic impact assessment at regional and NSW level of each opportunity and for the overall package
- A broader assessment of the longer term potential of proceeding.

Hold points are proposed for agreement as follows:

- Agreement to the proposed opportunity abstract (see bolded items above)
- Agreement to the detailed opportunity proposal (see bolded items above).

The detailed opportunities will be provided by either team members or other SKM staff with relevant experience. At this stage the following people are proposed:

- Tourism – David Cotterill
- Broad band enabled - David Cotterill with input from Mark Hughes SKM's GMC Telecommunications. We assume that Linda Summers will also be able to assist in the development of this opportunity
- Education, research and centres of excellence – David Cotterill with input from Steve Manders

- Agriculture, forestry and natural resources – Craig Clifton
- Transport and Logistics – Steve Manders.

Following this stage of the project the five key opportunities will be:

- Documented as business cases (Business Case Development)
- Collated into an overall implementation plan (Delivery Strategy).

The findings from the total project will then be collated into an overall report covering the research process, findings, business cases and implementation plan. This collation may pull the relevant reports into a single document or it may be a higher level summary document that references the other reports subject to discussion and agreement with the Steering Committee.