



NORTHERN GRAMPIANS SHIRE COUNCIL

ECONOMIC DEVELOPMENT STRATEGY AND ACTION PLAN 2021-31

What We Heard Engagement Report





Acknowledgements:

The Economic Development Strategy and Action Plan, 2021-2031, Steering Committee and Northern Grampians Shire Council (NGSC) acknowledge traditional owners; Wotjobaluk, Jaadwa, Jadawadjali, Wergaia and Jupagulk peoples who are the Traditional Custodians of the land on which we discuss in this report. We pay our respects to the Elders both past and present and extend that respect our other Aboriginal clan groups.

NGSC would like to acknowledge and thank all individuals who gave their time to be interviewed as part of the targeted stakeholder engagement process for Council's Economic Development Strategy and Action Plan, 2021-31, background report.

Accessibility

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1. Introduction

1.1. Purpose of this report

The purpose of this report is to summarise key messages heard through structured interviews undertaken as part of the investigation and analysis phase of preparing Northern Grampians Economic Development Strategy and Action Plan, 2021-2031 (phase two).

Desktop analysis and investigation to date has provided insight into key industry performance, COVID-19 impacts, and economic trends. This report summarises the findings of qualitative research undertaken to better understand Northern Grampians Shire's distinctive assets, economic conditions, and opportunities.

Specifically, structured interviews were used to provide us with important local insight into:

- Competitive advantages (stand out strengths)?
- Greatest opportunities?
- Biggest challenges (issues and barriers to growth)?
- Strongest drivers of change?
- What action could be taken to overcome barriers and realise opportunities?

The analysis has been themed based on economic drivers that determine longer term competitiveness.

This report does not provide any recommended responses, but simply summarises what the community and other stakeholders told us.

Qualitative and quantitative research will help inform the Final Economic Development Strategy and Action Plan, 2021-31.

Next steps will involve engaging with the community on a draft strategy prepared in response to what has been captured in the background reports and engagement.

1.2. About the project

As a consequence of COVID-19, new challenges are affecting all of our business sectors and communities. At the same time, opportunities to work differently have arisen.

Council recognises that if we don't plan for the future, Northern Grampians face the risk of missing opportunities, losing business and continuing to lose people to other regions. It is critical that we orientate ourselves towards our future. It is critical that we make the most of our assets and competitive advantages. It is critical that we do this in collaboration with our community.

As a consequence, Northern Grampians Shire Council is currently working with a steering committee, made up of key industry sector representatives to deliver an Economic Development Strategy and Action Plan for 2021-31 (the 'Strategy').

Due for completion in early 2021, the Strategy will define what we want the future to look like, what pathways we will pursue to get there, and what actions we will take to pursue those pathways.

The strategy will be about practical things that we can, and must do, to build the economic wellbeing and quality of life for our communities. The Strategy will adopt the widely held view that economic development, at the highest level, is about delivering programs or activities that aim to improve the economic wellbeing and quality of life for the community.

1.3. The engagement process

Stakeholder engagement will be undertaken throughout a number of project phases and delivered in accordance with Council's Community Engagement Policy (Table 1). Community engagement processes undertaken by Northern Grampians Shire Council are guided by the standards developed by the International Association for Public Participation (IAP2)

Project phase	Engagement	Timeframe
Phase one: Initiate and plan	Official launch: Inform	July, 2020
Phase two: Investigation and Analysis	Qualitative research: involve	September - November 2020
Phase three: Draft Strategy	Involve the community in identifying key: <ul style="list-style-type: none">• strengths• opportunities• challenges and• drivers	December - February 2021
Phase four: Engage on Draft Strategy	Involve the community in grouping/ strengths - identifying our: <ul style="list-style-type: none">• stand out strengths• greatest opportunities• biggest challenges Public exhibition of draft Strategy: collaborate and empower	February - March 2021
Finalise	Inform the community of the decision	April 2021

Table 1: Engagement overview

Level of influence

As part of phase two of the project, the project Steering Committee and Council made a commitment to involve local industry sector groups/associations and leaders in the project to make sure that concerns, aspirations and considerations are understood and reflected in the final strategy.

Benefit of industry sector stakeholders involvement:

The steering committee expected that industry specific organisations and industry leaders will provide input and expertise on industry insights including:

- weaknesses/current and emerging barriers to growth;
- testing and refining strengths identified via research and data for NG including: locational, community and lifestyle, infrastructure and services, business and community;
- current and emerging opportunities to strengthen 'driver industries';
- operating condition, outlook and performance at the local level;
- understanding international export reliance and how vulnerable Northern Grampians economy is to a fall in global demand; and
- private sector involvement in action and implementation.

It is expected that stakeholders will want to be:

- informed of the overall progress of the project; and
- involved in providing input and insights into matters relating to their sector.

It is expected that industry stakeholders will have a significant level of interest in the project.



2. Phase 2 Engagement

A series of semi-structured interviews and online survey were undertaken to complement the quantitative data analysis and strategic document review capture in the background documents. A total of 44 people were interviewed including people from 17 key industry sectors and general members of the community. Interviewees were targeted based business size and in achieving a cross section of industries representative of our current and emerging industry mix. Table 2 provides a snapshot of the engagement program snapshot and Table 3 shows the number of Interviewee by sector.

The aim of this qualitative research was to:

- evaluate how closely findings of existing strategic work aligns with current local driving industry views on economic strengths, opportunity and challenges to growth aligns with current stakeholder insights.
- draw on local insight and identify gaps in the Northern Grampians Economic Development Strategy and Action Plan, 2021-31 Steering Committee's understanding of unique assets/competitive advantages/ strengths, barriers to growth and opportunities of the mature and driving sectors in our Shire.
- To build trust and stronger networks with the community

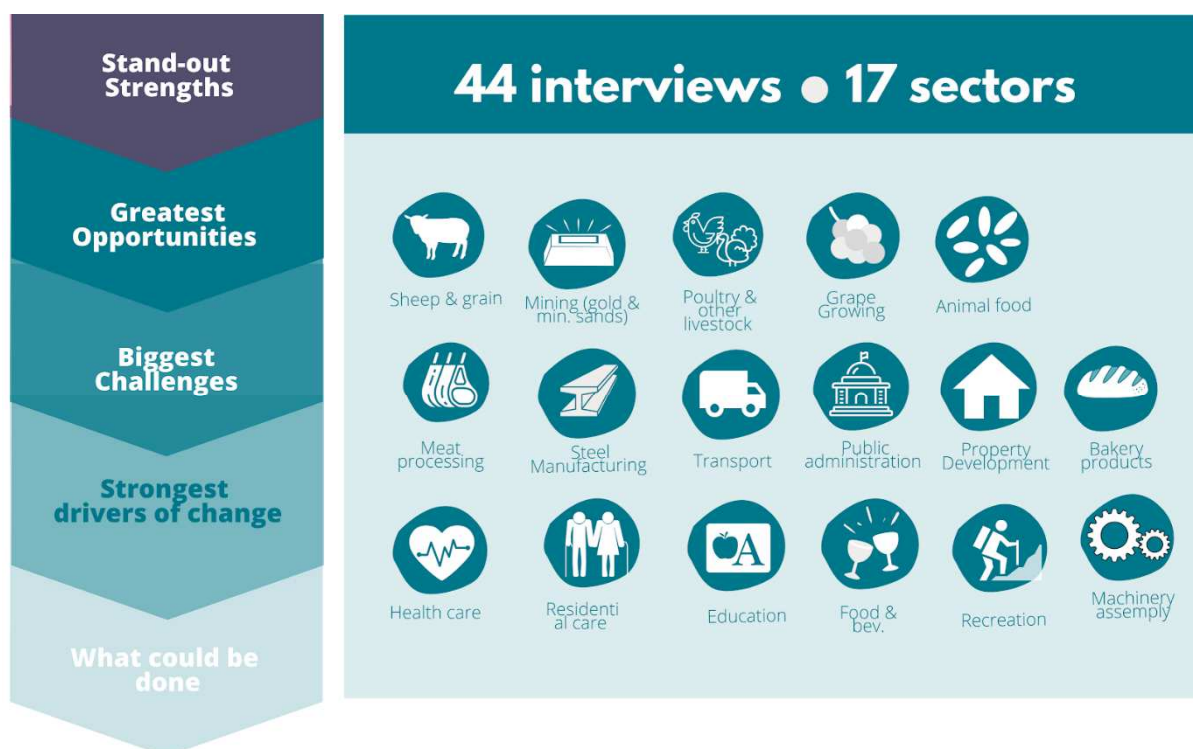
2.1. Phase two engagement method

Participants were asked a series of questions via a one-on-one survey and questionnaire.

Key research revolved around identifying what are Northern Grampians:

1. competitive advantages (stand out strengths);
2. greatest opportunities;
3. biggest challenges (issues and barriers to growth);
4. strongest drivers of change; and
5. what action could be taken to overcome barriers and realise opportunities.

A copy of the structured interview questions and online survey is provided in Appendix 2.



Date	Activity	Target audience	Purpose
4 - 21 Sep. 2020	Online questionnaire	Wider business community	<ul style="list-style-type: none"> To evaluate how closely assets, strengths, barriers to growth and opportunities identified in existing strategic work aligns with current stakeholder views.
23 Sep. - 20 Oct. 2020	Structured one-on-one Interviews	Key industry sectors: <ul style="list-style-type: none"> Tourism-related businesses Mining Manufacturing Sheep and Grains Health Care Services Residential Care & Social Assistance Services Poultry & Other Livestock 	<ul style="list-style-type: none"> To explore unique assets/competitive advantages/ strengths, barriers to growth and opportunities. To understand: <ul style="list-style-type: none"> existing linkages between firms/ locations/regions how to strengthen existing linkages, and how to establish new, beneficial relationships among firms/locations/regions were Council could focus efforts to influence economic change

Table 2: Engagement program snapshot



2.2. Interview sector breakdown

Broad Industry sector group	Sector mix	Total
Primary	Sheep & grain Gold mining Sand mining Organic Crop growing Poultry (meat and eggs) Pig Farming	12
Secondary	Other Food Product (including prepared Animal Feed) Manufacturing Wine and spirits Meat & Meat Product Manufacturing Basic Chemical Manufacturing (fertilizer) Bakery Product Manufacturing Steel Manufacturing	9
Tertiary	Transport Retail trade	2
Quaternary	Community Education Public Administration	11
Quinary	Residential Care & Social Assistance Services Food & Beverage Services Health Care Services Sport and recreation	10
	Total	44

Table 3: Interviewee sector breakdown



3. Structure of the report

Findings of the qualitative research are presented in four sections. Section one, a snapshot of themed community insight. Section two, a description of the key finding under each theme, and some of what was said by the community. Section three shows what was identified as key drivers of change and section four summaries what the community and key industries think could be done to address key challenges.

This report does not provide any recommended responses, but simply summarises what the community and other stakeholders told us. Qualitative and quantitative research will help inform the Final Economic Development Strategy and Action Plan, 2021-31. Next steps will involve engaging with the community on a draft strategy, prepared in response to what we've heard so far and what the data tells us.





4. What we heard from the community

4.1. Themes: economic drivers that determine longer term competitiveness

Findings were grouped under ten themes that focus on the economic drivers that determine longer term competitiveness. Themes identified by the Australian Regional Institute (ARI) were adopted in order to distil insight gained via the structured interview process. The Australian Regional Institute (ARI) identified ten themes and 68 indicators that focus on the economic drivers that determine longer term competitiveness. The work was built on significant international experience in the development of competitiveness indices. The indicators reflect the experience and approach of the World Economic Forum's Global Competitiveness Report methodology, the European Union's Regional Competitiveness Index and Centre for International Competitiveness in the UK. The ARI framework however is unique to Australia's economic situation. See appendix 1 for a more detailed explanation of each theme¹.

4.2. Section one: Snapshot of key findings

This section provides an overview of what was found through semi-structured interviews. In analysing the qualitative data consistencies emerged and findings distilled under the key questions and overarching themes.

Qualitative data from the structured interviews was analysed to identify links between the findings, specifically what:

1. Northern Grampians stand-out strengths and competitive advantages are;
2. what our greatest opportunities for growth are based on our stand out strengths; and
3. what challenges (or issues) must be overcome in order to release key opportunities.

Further, interviewees were asked what the key drivers of change face their sector and what Council and other stakeholders could do to address key issues in order to realise key opportunities

¹ Regional Australia Institute (2014) Your guide to understanding [In]sight: Australia's regional competitiveness index, Available at: <http://www.regionalaustralia.org.au/home/wp-content/uploads/2015/10/InSight-User-Guide-Revised-30-06-2016.pdf>

4.3. Snapshot: what we heard about Northern Grampians

		1. Stand-out strengths and competitive advantages	2. Greatest opportunities for growth are based on our standout strengths	3. Biggest challenges (or issues) must be overcome in order to release key opportunities
	Infrastructure and essential services Access to infrastructure, transport and services.	<ul style="list-style-type: none"> Halls Gap, Brambuk and the Grampians Peaks Trail Strategic Location of Stawell and St. Arnaud Infrastructure and land affordability Water security and quality Access to health care, social assistance and contemporary aged care 	<ul style="list-style-type: none"> Waste and recycling services Renewable Energy 	<ul style="list-style-type: none"> Housing Future proofing key transport routes to market Educational infrastructure Energy security and affordability
	Natural Resources, culture and heritage Availability and use of natural resources	<ul style="list-style-type: none"> Gariwerd (Grampians National Park) and Indigenous culture heritage Significant gold and wine history Environmental conditions Mineral resources rich Rich in mineral resources Productive agricultural land 	<ul style="list-style-type: none"> Grow intensive agriculture Increase mineral sands and gold mining Develop a Native Bush Food Industry 	<ul style="list-style-type: none"> Climate Change
	Innovation Innovative capacity and outputs through R&D and business dynamism	<ul style="list-style-type: none"> Stawell Underground Physics Lab (SUPL) 	<ul style="list-style-type: none"> Attract knowledge intensive business Grow local business innovation 	
	Business Sophistication Capacity of business to respond to competitive pressures	<ul style="list-style-type: none"> Diverse and resilient industry and economic base 	<ul style="list-style-type: none"> Value-add to Agriculture Grow visitor spend Export residential care Diversify healthcare delivery Advanced manufacturing Warehousing and distribution 	<ul style="list-style-type: none"> Industry networks (local and external)
	Human Capital The capabilities and skills of the workforce of a region.		<ul style="list-style-type: none"> Increase educational outcomes Regional and rural migration 	<ul style="list-style-type: none"> Resident and workforce attraction Educational outcomes Aboriginal cultural heritage and traditional owner acknowledgement Community acceptance of new technology
	Demography The characteristics of the local population			<ul style="list-style-type: none"> Ageing and declining population
	Technological readiness Access and utilisation of new technologies.			<ul style="list-style-type: none"> Digital connectivity shortfalls
	Institutional Foundations Administrative support for regional development			<ul style="list-style-type: none"> Healthcare and social assistance Policy and funding Migration policy Investment attraction capacity/leadership Planning approval and policy State Government investment into Grampians National Park Public land management in Halls Gap Demands on traditional owners Funding for destination marketing Lack of visitor experiences/attractions and supporting collateral (Stawell and St. Arnaud)
	Economic Fundamentals The general economic climate of a region.			<ul style="list-style-type: none"> Condition of commercial buildings
	Labour market efficiency Use of the potential regional workforce by the economy.			<ul style="list-style-type: none"> Labour force characteristics

Table 4: Snapshot: what we heard about Northern Grampians



4.4. Section two: Breakdown of key finding

4.4.1. Stand-out strengths and competitive advantages

The following table provides a breakdown of what we heard through structured interviews when asked about Northern Grampians key strengths and how interviews generally described or justified what made the strength unique or how it created a competitive advantage for Northern Grampians. Interviews often identified links between strengths which compounded the impact of individual strengths and highlighted Northern Grampians greatest opportunities (identified in the following table).

Ref	Strength	Description/justification	Compounding strengths	Some of what was said
Infrastructure & Essential Services				
1.1	Halls Gap, Brambuk and the Grampians Peaks Trail	<p>Halls Gap is the only township located within the heart of the Grampians region, with over 100 years of ongoing tourism brand awareness being a major tourist destination famous for its stunning natural and cultural assets.</p> <p>Halls Gap is the key strategic point of entry to the Grampians Peaks Trail (GPT) (one of the Walk Victoria's Icons long distance trails) and home to Brambuk, the National Park and Cultural Centre, an iconic, award winning park information and cultural centre.</p>	<ul style="list-style-type: none"> Gariwerd (Grampians National Park) and Indigenous culture heritage. <p>The town acts as the key service centre and provides direct access to the 167,000-hectare Grampians National Park, the fourth largest National Park in Victoria.</p>	<p>"All other regions leverage off Halls Gap as the regional 'jewel in the crown' (I34)</p> <p>"Halls Gap was the most frequently searched destination through booking.com when COVID-19 restrictions eased in Victoria in 2020." (I14)</p>
1.2	Strategic Location of Stawell and St. Arnaud	<p>Northern Grampians is located centrally within Victoria, with direct access to key national transport routes including the Western Sunraysia Highway which links Melbourne to the Mallee and Wimmera regions, and South Australia. This creates direct access to a range of raw commodities, as well as interstate and international markets.</p> <p>The two major towns, Stawell and St Arnaud, are within close proximity to a number of major regional centres (Ballarat, Bendigo and Horsham), and are under 3-hours' drive to Melbourne.</p> <p>Businesses located in Northern Grampians reported that these factors combined contributed to creating a competitive advantage, due to supply and distribution cost savings.</p>	<ul style="list-style-type: none"> Infrastructure and land affordability Water security and quality Environmental condition Rich in mineral Resources Productive agricultural land 	<p>"We can run rings around some of our competitors on price due to our direct and close proximity to our supply chain. What we pay in freight is much lower and that puts up on a much more viable basis and can do it a lot cheaper than others who are not as well positioned on a direct supply chain route from Melbourne - the cost of that in our supply chain makes us highly competitive". (I2)</p> <p>"One of the big strengths is you've got the Western Highway running straight of the Shire all through the Shire. You've also got the Wimmera Highway and Sunraysia highway therefore freight and access to the Port in Melbourne is very good - only 2.5hrs from Stawell or St. Arnaud." (I1)</p> <p>"B-double access has improved, and the highway upgrade will increase transport efficiencies" (I9).</p>
1.3	Infrastructure and land affordability	The cost of land and development of infrastructure for industrial, commercial and residential uses is below metropolitan and regional city averages.	<ul style="list-style-type: none"> Halls Gap, Brambuk and the Grampians Peaks Trail Strategic Location of Stawell and St. Arnaud Water security and quality Environmental condition Gariwerd (Grampians National Park) and Indigenous culture heritage Rich in mineral Resources Productive agricultural land Diverse and resilient industry and economic base 	<p>"People feel it's an affordable choice" (I39)</p> <p>"We moved from inter-state. The cost of land and development, and wide customer reach possible here due to the location were key factors in our decision" (I2)</p>
1.4	Water security and quality	The South West Loddon Pipeline has given our agricultural, manufacturing and future mining operations significant water security and quality. Enhanced viability including increased recreation opportunities has also been made possible through the pipeline.	<ul style="list-style-type: none"> Strategic Location of Stawell and St. Arnaud Environmental condition Rich in mineral Resources Productive agricultural land Diverse and resilient industry and economic base 	<p>"Secure water - key part of the business - in 2007 b/f the pipeline would never run a full complement of pigs - now with the pipeline we can operate at 100% and get the best out of the facility." (I20)</p> <p>"One thing that has transformed the business was water via the GWM pipeline. Our viability, we've seen an increase in productivity in the broadacre cropping side of things" (I9).</p> <p>"We have good quality land, great sunshine, water security, 3 phase power" (I26)</p>



Ref	Strength	Description/justification	Compounding strengths	Some of what was said
1.5	Access to health care, social assistance and contemporary aged care	<p>We have stronger social support and welfare services than other comparable regional and rural towns in Western and Northern Victoria and comparable to large regional centres.</p> <p>We are leading the way in Victoria for contemporary aged care in Stawell, where there are modern facilities and a strong commitment to keeping people in and connected to their own community.</p> <p>Stawell is seeing an expansion of residential care, where other surrounding towns remain the same size.</p>	<ul style="list-style-type: none"> Environmental condition Diverse and resilient industry and economic base 	<p>"Our Health services are locally run services, that people feel they can trust - that is a point of difference with outreach service where offices are based outside the communities they serve" (I8)</p> <p>"We want to live in a community who relish in our aged people - our aged people have a connection and remain as part of the community". (I18)</p>
Natural Resources and Heritage				
1.6	Gariwerd (Grampians National Park) and Indigenous culture heritage	<p>The Grampians National Park is heritage-listed for its animal and plant life, Aboriginal heritage and stunning natural beauty. The Grampians is the 4th most visited national park in Victoria and holds between 80-90% of Victoria's Aboriginal rock art.</p> <p>Nearly 45% of the Grampians National Park and all of the most visited park attractions are located within the Northern Grampians Shire, including Pinnacle lookout, MacKenzie Falls, Reed Lookout and the Balconies.</p> <p>Bunjil Shelter, located in the Black Range Scenic Reserve near Stawell is the only known rock art painting of Bunjil and widely regarded as one of the most significant cultural sites in south eastern Australia.</p>	<ul style="list-style-type: none"> Halls Gap, Brambuk and the Grampians Peaks Trail Infrastructure and land affordability Significant gold and wine history Environmental condition Productive agricultural land 	<p>"The indigenous history sets the region apart from a potential visitor experience perspective. Volumes of indigenous art and sites of cultural heritage significance are located within the Shire (80% of Victoria's Aboriginal art is located within the Grampians) and the accessibility to metro Melbourne and major gateway to visitor visitation to the country." (I14)</p> <p>"Our Indigenous culture heritage can't be replaced, and it can't be replicated, and it is truly unique - it is an asset that people want to protect. That's what people are interested in and attracted to." (I27)</p> <p>"We all sit under the attraction of the Grampians as an outdoor visitor space - but other regions also have natural areas, but there are very few things that are truly unique and can't be exploited and enjoyed anywhere else, and what is unique is our Aboriginal heritage, underground wine drives, GPT, these are living history." (I27)</p>
1.7	Significant gold and wine history	<p>Great Western, a sub-region of the historic and highly regarded Grampians region in Victoria, is home to the world's oldest Pinot Meunier vines at Best's. The famed Nursery Block at Best's Wines in Great Western is believed to hold the most extensive collection of pre-phylloxera plantings in Australia – and possibly the world. Because of the scarcity of its Pinot Meunier plantings, Best's winery makes this wine only in the best vintages.</p> <p>The longest producing wine region in Victoria. In April 1866, founder Henry Best planted some of the oldest vines in Australia. Known for shiraz and sparkling wines, the Grampians has been a quality wine-producing region for more than 150 years.</p> <p>Great Western is also home to the longest underground drives in the southern hemisphere at Seppelt, with links to Victoria's gold rush era.</p>	<ul style="list-style-type: none"> Halls Gap, Brambuk and the Grampians Peaks Trail Infrastructure and land affordability Gariwerd (Grampians National Park) and Indigenous culture heritage Environmental condition Rich in mineral Resources Productive agricultural land 	<p>"The wine sector including the underground drives at Seppelts are truly unique because it doesn't exist anywhere else" (I27)</p> <p>"The thing about the wine industry is that all wine areas are thinking how do they set their wine apart and the only thing that sets wine about is brand recognition and price point...Wine is essential to Great Western and the history of wine making sets our regions wines apart (I27)"</p> <p>"There are 21 wine regions in Victoria - all competing against each other. Our point of difference is our cool climate shiraz and history. We have 150 years of continuous wine making and infrastructure to show that history, like very old cellars. That is our point of difference". (I21)</p>
1.8	Environmental conditions	<p>The region's landscape is characterised as being diverse, the environment is healthy, and we have the advantage of open spaces (for rural living, industrial use buffers and biosecurity). Our climate is favourable in terms of rainfall and temperature.</p>	<ul style="list-style-type: none"> Halls Gap, Brambuk and the Grampians Peaks Trail Strategic Location of Stawell and St. Arnaud Infrastructure and land affordability Water security and quality Gariwerd (Grampians National Park) and Indigenous culture heritage Productive agricultural land Diverse and resilient industry and economic base 	<p>"We have good quality land, space, great sunshine, water security and key infrastructure, like 3 phase power and commodities". (I26)</p> <p>"We have space - access to national parks and direct access to regional centres. We need to embrace our unique rural assets for families". (I11)</p> <p>"There are plenty of opportunities to leverage the Grampians as a brand and add-value to our agricultural products" (I1)</p>
1.9	Mineral resources rich	<p>Northern Grampian is rich in mineral resources including mineral sands and gold.</p> <p>The Stawell Corridor is a significant geological setting for gold with substantial potential for further exploration. There may be almost as much gold still to be uncovered as has been mined, with estimates that there could be up to 75 million ounces of gold still to be found in parts of the central and western</p>	<ul style="list-style-type: none"> Strategic Location of Stawell and St. Arnaud Infrastructure and land affordability Water security and quality Access to health care, social assistance and contemporary aged care 	<p>"We (Victoria) and in particular this part of the world is sitting on the edge of a mining boom. I don't think there is the appreciation and understanding of what mining brings rural communities - communities grow off the back of mining, like schools and other services" (I40)</p> <p>"Victoria had the fourth highest exploration spend so far in 2020, above the Northern Territory, South</p>



Ref	Strength	Description/justification	Compounding strengths	Some of what was said
		<p>Victorian gold zones.</p> <p>Within the Murray Darling Basin, Northern Grampians encompasses part of the largest mineral sands deposits in the world and holds some of the largest and cleanest source of rare earths in the state (in the mineral sands).</p> <p>The Donald Mineral Sands project (currently in development and within close proximity to St. Arnaud) is one of the largest known zircon and titanium resources in the world.</p>	<ul style="list-style-type: none"> Significant gold and wine history Productive agricultural land Diverse and resilient industry and economic base 	<p><i>Australia and Tasmania.” (I30)</i></p> <p><i>“Material that comes from mineral sands is used in so many things we rely on, like touch screen technology, aircrafts, iPhones, make-up and titanium used in medical procedures and more” (I40)</i></p>
1.10	Productive agricultural land	<p>The strength of our agricultural sector derives from the diversity and volume of crops and livestock produced in Northern Grampians. Varied soil types, climatic condition, and space were considered key factors in Northern Grampians agricultural advantages.</p> <p>This theme also emerged as a compelling and distinguishing competitive strength within the strategic documents reviewed. The review found that the Shire is at the southern end of Victoria's grain production heartland and has partnered in the innovations and practices which have propelled Australia's dryland production systems to become the most efficient in the world.</p>	<p>The advantage of space (biosecurity and land use conflict management), position in the state and access to key national transport routes are strongly linked to the strength in the agricultural sector.</p> <ul style="list-style-type: none"> Strategic Location of Stawell and St. Arnaud Water security and quality Environmental condition Diverse and resilient industry and economic base 	<p><i>“Because the area is slightly warmer than south of divide, with higher more reliable rainfall than the Mallee and a mix of soil type, the area is very well suited to mixed farming.” (I9)</i></p> <p><i>“We have a cluster of Merino studs, breeding modern new age animals and the industry in diversifying into different types of merinos. The new State Merino Field Day in Marnoo attracted 500-700 attendees in the first year and 600 rams on display.” (I16)</i></p> <p><i>“We should be promoting and celebrating the huge contribution made by the agriculture sector and that the sector is embracing technology and advancements. Our agriculture sector is leading the world and taking up new approaches to meeting market needs. Weed to promote our region for what it brings to the world from an Agricultural perspective.” (I11)</i></p> <p><i>“Corporate farming brings investment from outside the shire, into the shire and it shows that the area is being recognised” (I1)</i></p>
Innovation				
1.11	Stawell Underground Physics Lab (SUPL)	<p>SUPL is the single most unique recent development in Northern Grampians. Created within the active Stawell Gold Mine, it will be the only underground lab in the Southern Hemisphere and will join a network of underground facilities in the US, Europe, UK, China and South Korea. SUPL is one kilometre underground and research undertaken there will seek to detect dark matter which will show how the universe was formed after the Big Bang and the gravitational pull that keeps our galaxy the Milky Way together. This is said to be the biggest yet most relevant challenges facing science today.</p> <p>SUPL is a collaboration between domestic tertiary institutions (the universities of Melbourne, Swinburne, Adelaide, Western Australia and Australian National University); the Australian National Nuclear Research and Development Organisation; Princeton University and the Italian Institute for Nuclear Physics.</p>	<ul style="list-style-type: none"> Rich in mineral resources 	<p><i>“SUPL will birth into all sorts of different kinds of research projects, but it will take time to develop and nurture.” (I13)</i></p>
Business Sophistication				
1.12	Diverse and resilient industry and economic base	<p>Although small, Northern Grampians economy is seen as being diverse, a feature the community identifies strongly with Northern Grampians.</p> <p>All key townships are home to a number of growth orientated businesses who are facilitators of exports, imports, wholesale trade and strong local supply chains. These businesses expressed an outlook for growth, identifying new customers and a desire to embrace new technology.</p> <p>Business and community resilience and a focus on growth and development emerged as a key strength. Businesses are, or are, seeking to respond to competitive pressures including consumer driven increases in standards of operation and the need to embark on new technology.</p>	<ul style="list-style-type: none"> Strategic Location of Stawell and St. Arnaud Infrastructure and land affordability Water security and quality Access to health care, social assistance and contemporary aged care Environmental condition Rich in mineral Resources Productive agricultural land 	<p><i>“We have a lot of really well established businesses in St. Arnaud - growth-oriented entrepreneurs - keen to explore new market opportunities by creating and growing their business to capture it ”(I38)</i></p> <p><i>“Northern Grampians is unique because of its diversity - range of tourism, manufacturing and agriculture - other regions don't have that sense of diversity to the extent we do.” (I16)</i></p> <p><i>“We have very progressive farmers trying to improve their business and move forward - help to move businesses forward. Small and large and provides a large opportunity to move forward” (I38)</i></p> <p><i>“Our company is the most stable in this region and we are looking to expand - the future is very strong. The St. Arnaud plant is very secure having adopted new technology and 100% compliance on animal welfare and environmental management requirement” (I20).</i></p> <p><i>“There is a new generation of farmers embracing digital agriculture. Strong, diverse and evolving</i></p>



Ref	Strength	Description/justification	Compounding strengths	Some of what was said
				<p>Agricultural sector. It's a more competitive market now... This means that businesses that support agriculture need to keep up with the standard that's expected as we can now make purchase goods and services from a lot further afield" (I9)</p> <p>"Our farming community is very resilient and young farmers are returning and technology is becoming a big thing and the money people are spending on computerised systems is absolutely amazing. Despite what's going on, be it a pandemic, flood, drought or fire they will keep going and will still give it a go" (I2)</p> <p>"We have an entrepreneurial local base - with existing capacity. We have the right business that are able to take on opportunities to expand into agriculture associated industries" (I38).</p> <p>"COVID-19 forced ram sales to go online and rams were sold to people who selected on attributes identified via videos - that's never been done before. Buyers would usually come from across the country, but were able to purchase rams worth tens of thousands having not seen them in the flesh" (I9)</p>

Table 5: Stand-out strengths and competitive advantages



4.4.2. Greatest opportunities

The following table provides a summary of what interviewees told us about Northern Grampians greatest opportunities for growth, based on stand out strengths and competitive advantages.

Ref.	Opportunities	Description/justification	Leveraging strengths	Some of what was said
Infrastructure & Essential Services				
2.1	Waste and recycling services	The recent recycling disruptions has the potential catalysed opportunities for greater local waste management services, made possible due to existing regional strengths.	<ul style="list-style-type: none"> Strategic Location of Stawell and St. Arnaud Infrastructure and land affordability Productive agricultural land 	<p>"There is an opportunity to focus on the ability to reuse and biochar (important low carbon soils). We have space to take green waste and convert it into usable products." (I26)</p> <p>"We are rich in intensive industries in this location and waste products are being created, which can be converted to organic material. This is already happening in Northern Grampians and there is an opportunity to grow in this area" (I18)</p>
2.2	Renewable Energy	Northern Grampians is well placed to become a hub for renewable energy, based on key regional strengths.	<ul style="list-style-type: none"> Strategic Location of Stawell and St. Arnaud Infrastructure and land affordability Environmental conditions <p>This opportunity was also linked to overcoming energy capacity and affordability shortfalls to support rural industry, particularly in the St. Arnaud area.</p>	<p>"We could lead the way for Hydrogen, the region has the perfect conditions for it..."</p> <p>good ground, sun and an abundance of water." (I26)</p> <p>"We should be selling ourselves as a sustainable region." (I17)</p>
Natural Resources and Heritage				
2.3	Intensive agriculture	Further growth potential in intensive agriculture emerged as a key opportunity, particularly in poultry.	<ul style="list-style-type: none"> Strategic Location of Stawell and St. Arnaud Infrastructure and land affordability Water security and quality Environmental conditions (inc. conditions that create strong biosecurity) Productive agricultural land Diverse and resilient industry and economic base 	<p>"We can see an opportunity to grow the poultry industry in our region. The demand for protein through poultry is growing nationally and our strategic location, environmental condition and access to suitable space makes the area very well positioned" (I26)</p> <p>"I see an opportunity to grow the poultry industry in our region" (I9)</p>
2.4	Increase mineral sands and gold mining	<p>The Donald Mineral Sands project is expected to create 150 positions onsite during construction, with the number increasing to 350 during full scale operations. The project has a long-anticipated project life offering long-term employment opportunities.</p> <p>The growth provides the potential for mineral sand mining companies to diversify into agriculture or partner with existing producers. Increases in mineral sand mining creates the opportunity to attract other industries through leveraging off power and water infrastructure delivered by new mineral sands projects.</p> <p>High wages and salaries may attract new residents and help retain young people locally with agriculture being transferable to the mining sector.</p> <p>There are a number of explorers active in the area (including Navarre) which may lead to a mine/s in future in mineral sands, gold and base metals like copper.</p> <p>The future of gold mining in Northern Grampians is very strong for reasons including:</p> <ul style="list-style-type: none"> Buoyancy (high gold prices) in the state of Victoria in settings where gold mines are running the capital investment interest to advance projects a mature gold mining asset in Stawell the launch of a new company in a public sector environment (North Stawell Minerals) and funds for advancement and capital sector investment interest <p>Increased apprenticeship programs VCAL programs from traditional trades into scenes</p>	<ul style="list-style-type: none"> Significant gold and wine history Rich in mineral Resources Strategic Location of Stawell and St. Arnaud Infrastructure and land affordability 	<p>"Emerging mineral sands mining will be a game changer for St Arnaud. The construction process will employ 200 people, with a further 200 operating full time jobs (including 50 additional contractors), ranging from engineering, geology and the majority are miners - involving the use of digital technology and field work." - it more now around a full function processing plant" (I40)</p> <p>"A Lot of people are putting a focus on Horsham as being the hub of mineral sands - but they are not considering that a lot of the same support services exist outside of Horsham - St. Arnaud could be the hub of mineral sands mining" (I40)</p> <p>"Mineral Sand mining are generational sites - they are not typical sites because there are upwards of 40-80 years of mining life. The mining method is low intensity, rehabilitated and returned to Agricultural production within a short period of time. Mineral sands mining in the area is undertaken in cropping areas, on already disturbed paddocks and returned to same or better yield. Test work on soil disturbance of the top 1m of soil has resulted in improved yield" (I40)</p> <p>"With gold exploration programs having been invigorated, and with the funding that can be accessed now, opportunities for growth in gold mining could be generational" (I13)</p>



Ref.	Opportunities	Description/justification	Leveraging strengths	Some of what was said
2.5	Native Bush Food Industry	Invest into the community STEM - increase sciences in local schools, inspiring local students to transition into local professions. - strengthen the foundation by investing into it The Native Bushfood industry is estimated to be worth \$50M a year. This is expected to grow to \$250M (five times that amount) in the coming decade.	Opportunities to diversify into the Native Bush Food Industry arise from: <ul style="list-style-type: none"> Gariwerd (Grampians National Park) and Indigenous culture heritage Productive agricultural land (strong agricultural sector) Strategic Location of Stawell and St. Arnaud Water security and quality 	"Great opportunity to move into native food industry because. It's growing at rapid rates, but the issue is in the supply. There is an opportunity to work with private landholders to grow native foods in partnership with traditional owners. Department of foreign trade and investment are saying that there is an opportunity to grow the native food industry" (I39)
Innovation				
2.6	Attract knowledge intensive businesses	Stawell will be the epicentre for dark matter research in the Southern Hemisphere and will enable Australia to lead the world's attempts to understand what the universe is made of. SUPL will not only create advanced physics and engineering research capacity in Stawell, it has the potential to host basic cancer research SUPL will attract research and development organisations to Northern Grampians, through championing innovation in Australian Industry and will in turn increase the percentage of the population qualified in science, technology and engineering.	Opportunities in innovation are made possible through Northern Grampians being: <ul style="list-style-type: none"> rich in mineral resources (Stawell Gold Mine) home to the Stawell Underground Physics Lab (SUPL) 	"Being able to lead the way in dark matter research will enable Northern Grampians to develop a knowledge based organisations, which is essential to our competitiveness" (I13)
2.7	Growth in local business innovation	We have an opportunity to build on the resilience that exists in our growth orientated business by supporting a culture of innovation and best practice, to grow exports and jobs in existing businesses.	The following strengths were seen as creating an opportunity for greater local business innovation: <ul style="list-style-type: none"> Stawell Underground Physics Lab (SUPL) Diverse and resilient industry and economic base 	"We need to use technology to do things smarter" (I27) "Facilitate stronger local networks to foster innovation - like the Agriculture day run by Council 'Growing Ideas'. The day made people think and question what they are doing. It could be improved with a specific mission statement around what the day is about - be clear and specific". (I9) "Support, collaborate, partner with the innovative cohort, with local industry to facilitate promoting new ideas and challenging new ideas and push the boundaries. Get the younger generation of farmers talking and networking. Build on the 'State Merino Field days'." (I9) "There is demand (that isn't being satisfied) for goods and service businesses in St. Arnaud to support the existing community and industry - for example AutoElec, Mechanical engineering, air conditioning, electricians..." (I38)
Business Sophistication				
2.8	Value-add to Agriculture	Value-add to agriculture emerged as one of Northern Grampians strongest opportunities for growth. Rural industry opportunities identified included: <ul style="list-style-type: none"> Protein plant (using locally grown pulses) Rose growing and oil production Oil seed crushing for biodiesel or oil (using locally grown Canola) Wool scouring and lanolin production Biochars (made from material such as animal manure, broiler litter and green waste) Pellet mill for feed and grain Soybean growing and processing Controlled cropping, including medicinal marijuana Packaging and storage Fertilizer production (converting animal and organic waste into a usable product) 	Leveraging off: <ul style="list-style-type: none"> advantages in agriculture (inc. raw commodities and food production) water security and quality land and infrastructure affordability strategic location 	"We need to target our vision on key aspects that will value, add and utilise our resources. We need to foster the repurposing and value-adding production within our shire. - increasing the value of our commodities locally. We have been throwing our commodities at China and we need to process them in Australia" (I26) "We have an opportunity to attract more rural industry to the north of St. Arnaud - it is in a good position compared to Donald and Charlton." (I20) "Protein powder is really important - lots of athletes and people are aware of weight, however many people don't tolerate gluten and chickpea protein satisfies that market - the market exist" (I16) "Value-adding on farm packaging has been taken up by some growers. It's also about adding a story" (I9). "Another viable value-add proposition taken up locally is grain value-adding



Ref.	Opportunities	Description/justification	Leveraging strengths	Some of what was said
		<p>Value-added through branding, packaging and marketing locally grown products was also identified and linked to advantages in natural resources and heritage.</p> <p>Digital Agriculture</p> <ul style="list-style-type: none"> Utilizes digital tools such as wireless communication, IoT platforms, and mobile apps, as well as artificial intelligence, cloud computing, and robotics to influence the agri-food value chain in order to achieve "sustainable production" and "increase profit". Digital-Ag is a combination of modern solutions to "sustainable food future". 		<p><i>started via on farm storage" (19).</i></p> <p><i>"Farmers will continue to use more big data and analysis. The way the sector will do business will be very data driven and based on data analysis - driverless technology and monitoring.</i></p> <p><i>There is also an opportunity to make a strong branding and commitment to the brand - tie into "made the grampians" (126)</i></p> <p><i>"There are plenty of opportunities to leverage the Grampians as a brand and add-value to our agricultural products by growing ethically, sustainably growing food" (135)</i></p>
2.9	Growth in visitor spend	<p>There is great potential to expand and deepen the tourism market, particularly with respect to the high yield 'lifestyle leader' market.</p> <p>We have a distinctive advantage when it comes to increasing visitor spend through offering more and therefore keeping visitors in the region longer.</p> <p>Alongside continued destination marketing to increase front of mind awareness, opportunities exist to enhance the visitor experience, enabling more money to be captured locally and a stronger reputation as a first-class destination.</p> <p>Specific opportunities exist to:</p> <ul style="list-style-type: none"> Develop St. Arnaud as the gateway to the silo arts trail, historical and cultural hub Build on Great Western as a wine and food village with the development of Victoria's first wine museum at Seppelt Develop Stawell as a dark matter hub and leverage off a UNESCO World Heritage listing as the birthplace of the 1850s Victorian gold rush Develop Grampians National parks infrastructure to support visitor dispersal and a quality experience Develop Indigenous Cultural Heritage products in the Grampians National Park, Brambuk the National Park and Cultural Centre in Halls Gap Bunjil Shelter and Sister's Rocks out of Stawell, and leverage of world heritage listed 6,600-year-old Indigenous aquaculture region Budj Bim, Attract Private sector investment associated with GPT Five-star Nature-based and Eco-Accommodation in Halls Gap and investment attraction efforts in new products and reinvestment Develop Outdoor adventure products, including lakes and waterways experiences Increase the diversity and quality in culinary and retail offering and experience and build a strong reputation which supports 'lifestyle leaders' Develop regional cycling and trail infrastructure Investment enabling public realm infrastructure (e.g. Heath Street Bridge and other public realm works that builds market confidence, visitor perception and attracts quality private investment) Build on the calendar of Events Create an omnichannel for visitor information to enhance the experience, visitor dispersal and free up funding for destination marketing) 	<p>Leveraging off:</p> <ul style="list-style-type: none"> Halls Gap, Brambuk and the Grampians Peaks Trail Infrastructure and land affordability Wine and gold history Gariwerd (Grampians National Park) and Indigenous culture heritage Environmental condition 	<p><i>"We could become the flagship destination in the country for indigenous tourism. We have the basis of something great and something no other region has. Visitor numbers are expected to double; however the visitor experience is likely to diminish as accommodation, park infrastructure becomes saturated" (114)</i></p> <p><i>"Aboriginal people are compelled to want to connect back to their lands...the great things is that Aboriginal Cultural Heritage isn't going anywhere. We have an opportunity to increase visitor stay by having Aboriginal led tourism... Knowledge is shared by the collective not by the individual". (139)</i></p> <p><i>"We have the key components: beautiful landscapes, great wine - but we need to build a quality food offering and a culture that appreciates quality food." (128)</i></p> <p><i>"There is untapped potential, and we need to 'do better' when it comes to our visitor economy offering and experience that meets visitor expectations" (16)</i></p> <p><i>"We need to diversity the offering and therefore the potential to increase metro people's awareness of our region through building a better reputation as a region." (127)</i></p>
2.10	Export residential care	<p>Opportunities for growth in residential care are not only linked to the ageing population, the existing quality, future capacity for growth and reputation of Stawell</p>	<p>Leveraging off:</p> <ul style="list-style-type: none"> Access to health care, social assistance and 	<p><i>"We have the demand and desire to grow - this would involve the development of a range of residential housing options. This creates an opportunity to 'free up homes'</i></p>



Ref.	Opportunities	Description/justification	Leveraging strengths	Some of what was said
		aged care leads to the potential for the sector to deliver more to the economy. Export opportunities include: <ul style="list-style-type: none">'tree change' retirement.becoming a dementia friendly town	contemporary aged care	<i>and help address the housing shortage". (I18)</i> <i>"We see an opportunity to be a community who relish in our aged people - connect and keep our aged people part of the community." (I18)</i>
2.11	Diversify healthcare delivery	We have an opportunity to diversify how healthcare is delivered to facilitate greater in-home care, whilst not compounding social isolation. Opportunities including blending virtual and face to face consultations methods that go beyond tele-health, and facilitate stronger connections with other agencies	Leveraging off: <ul style="list-style-type: none">Access to health care, social assistance and contemporary aged careDiverse and resilient industry and economic base Addressing key issues: <ul style="list-style-type: none">Ageing and declining populationResident and workforce attractionLabour force characteristics Responding to drivers of change: <ul style="list-style-type: none">Consumer demandAdvancements in technologyWorkforce needs	<i>"Our LGBTIQ regional communities currently need to travel to Melbourne, there is an opportunity to have these communities supported locally with access to specialist via Tele-health"</i> <i>"COVID-19 has shown that there is a sweet spot through blending online consultation (Tele - health) with on-site consultation - combining face-to-face with video consultation we've been able to expedite the wait lists. We have also found there is a greater potential to attract a skilled workforce that has a blend of local and offsite presence" (I8)</i>
2.12	Advanced manufacturing	Opportunities for industrial innovation that leverage SUPL and other strategic regional advantages.	Leveraging off: <ul style="list-style-type: none">Strategic Location of Stawell and St. ArnaudInfrastructure and land affordabilityStawell Underground Physics Lab (SUPL)	<i>"We can't compete with China to manufacture Steel (subtractive manufacture), additive manufacture (3D printing using steel - laser) can make things that can't be made using subtractive manufacturing. These are digitally skilled jobs and would build on our competitive advantages" (I26)</i> <i>"SUPL brings outstanding opportunities for industry innovation and STEM education opportunities with a national lab that can deliver international world-class experiments". (I13)</i> <i>"Stawell would be a good location for digital manufacturing due to strategic location. Transportation is not the issue - we have trucks that travel all the time - we are central to major cities - the value of transport is inconsequential" (I26).</i>
2.13	Warehousing and distribution	Warehouse and distribution	Leveraging off: <ul style="list-style-type: none">Strategic Location of Stawell and St. ArnaudInfrastructure and land affordability	<i>"I think there is an opportunity for ...distribution centre here to supply customers in the north south east and west" (I2).</i>
Human Capital				
2.14	Increase educational outcomes	The skills, health and education of a workforce are fundamental to a region's competitiveness. Interviewees recognised SUPL as presenting a unique opportunity to generate significant local and regional educational benefits in primary and secondary schools' outcomes in maths and science. The equivalent dark matter research laboratory in Rome attracts up to 8000 school students each year. Pathways from school to skilled jobs, including training in the trades as part of schools' program also came to the fore.	Leveraging off: <ul style="list-style-type: none">Stawell Underground Physics Lab (SUPL)Rich in mineral Resources (Stawell gold mine)	<i>"For Australian students, this lab will undoubtedly inspire them to study physics in school and university. And it also means that if they want to be part of a leading global scientific experiment, they can do that in Stawell."</i> Swinburne University Professor Alan Duffy, by Georgina Jerums, 3 Feb 2020, The Victorian Connection. <i>"We have an opportunity to make stronger connections with schools to make sure there are pathways for students to take up local jobs and fill local job shortages. We need to make sure schools are encouraging our kids to stay or return and make sure there are programs that create pathways to careers in Agriculture for example</i>



Ref.	Opportunities	Description/justification	Leveraging strengths	Some of what was said
				<i>and the trades - VCAL" (111)</i>
2.15	Regional and rural migration	<p>COVID-19 has presented an opportunity to capitalise regional and rural migration.</p> <p>Opportunities to promote Northern Grampians for remote working, space, lifestyle reset, affordability and job opportunities exist, including converting visitors to residence.</p>	<p>Leveraging off:</p> <ul style="list-style-type: none"> • Halls Gap, Brambuk and the Grampians Peaks Trail • Strategic Location of Stawell and St. Arnaud • Infrastructure and land affordability • Access to health care, social assistance and contemporary aged care • Gariwerd (Grampians National Park) and Indigenous culture heritage • Environmental conditions - inc. rural living • Diverse and resilient industry and economic base <p>Attracting post COVID-19 migration also links to addressing challenges associated with attracting and retaining human capital and securing a skilled workforce</p>	<p><i>"COVID-19 has made metro people realise that jobs can still be done from rural areas". (139)</i></p> <p><i>"We can see the rural migration playing out and the data is telling us that people are not just coming from Melbourne, there is significant interest in our area from rural cities" (134)</i></p>

Table 6: Greatest opportunities



4.4.3. Biggest challenges

The following table provides a summary of what we heard through structured interviews regarding what challenges (or issues) must be overcome in order to release key opportunities.

Ref.	Challenge	Justification	Opportunities unlocked should the challenge be addressed.	Some of what was said
Demography				
3.1	Ageing and declining population	The population is declining, and the average age is increasing. This was identified as a key challenge to regional growth, putting a cap on business expansion through workforce shortages.	<i>"Relevant to all opportunities"</i>	<i>"Need to attract...young families, not retirees, we need people who can fill jobs" (I11)</i>
Technological Readiness				
3.2	Digital connectivity shortfalls	<p>A lack of high-speed digital connectivity emerged as a persistent challenge. 16.4% % of premises in Northern Grampians don't have internet access, compared to 11.68% across the Grampians Region and 8.37% across Victoria.</p> <p>Northern Grampians is significantly disadvantaged compared to nearby Ballarat and Horsham through poor quality and consistency of broadband access, lack of availability of mobile internet, employment in technology-related industries and employment in ICT.</p>	<p>Relevant to unlocking opportunities in:</p> <ul style="list-style-type: none"> Advanced manufacturing Growth in visitor spend Health and human services Digital agriculture Educational outcomes Resident attraction (rural migration) The digital divide all so emerged as a key challenge for growth focused businesses capacity to embrace innovation and efficient work practices, stifling productivity and putting a cap on growth 	<p><i>"We need to ensure we have high quality internet speeds to support the sector [Agriculture] to further capitalise digital platforms" (I9)</i></p> <p><i>"Lack of fast and reliable internet, impacting efficiency and barriers through slow EFTPOS, downloads, limiting access to online training and client meetings and industry networking". (I10)</i></p> <p><i>"Stronger digital technology will help facilitate telehealth and attract staff who want to live in a rural area". (I3)</i></p> <p><i>"Increase skilled, highly talented people by creating the conditions to do business here - but need very fast internet speed". (I27)</i></p>
Institutional Foundations				
3.3	Healthcare and social assistance Policy and funding	<p>Interviewees from the health and human services sector reported that policy changes have created challenges including larger service catchment areas. Alliances and stronger working relationships have become necessary with service providers from a wider geographical area.</p> <p>The availability of Government funding for aged care services was also reported as being a challenge to keeping ahead of demand.</p>	<p>Impacting potential to:</p> <ul style="list-style-type: none"> Diversify healthcare delivery 	<i>"The service doesn't make a profit and there are changing expectations in the future aging population around standard of living and care and we need to keep ahead of demand". (I18)</i>
3.4	Migration policy	Multiple sectors reported a heavy reliance on migrant workers skills and labour to keep their business sustainable.	<p>The community recognises the likely short and long-term impact of COVID-19 on the available skills and labour, including impacts on food security and access to health care professionals.</p> <p>A number of key opportunities may be affected including:</p> <ul style="list-style-type: none"> Intensive agriculture Increase mineral sands and gold mining Increase knowledge intensive businesses advanced manufacturing rural industry associated with value-add to Agriculture capacity export residential care diversifying health care delivery opportunities enabling growth in visitor spend 	<i>"Australians are often unwilling to do that type of work that we need doing to keep our business viable. We currently have 100 jobs we can't fill" (I24)</i>
3.5	Investment attraction capacity/leadership	<p>The Coordination of funding for businesses cases, preparation of investment prospectuses and targeted investment attraction activity was seen as lacking.</p> <p>The majority of those interviewed identified regional investment attraction capacity and leadership as a challenge to realising key</p>	<p>Despite regional competitive advantages in agriculture, water security, strategic location and transport infrastructure and the Grampians National Park (Gariwerd) and the GPT the community have not seen the level of private sector investment expected in opportunities including:</p> <ul style="list-style-type: none"> investment associated with GPT and five-star Nature-based and eco-accommodation in Halls Gap, and 	<p><i>"We are not getting the private investment associated with the GPT. The work hasn't been done to attract the investment in high end accommodation."</i></p> <p><i>We need a feasibility and business plan to attract high end accommodation in Halls Gap. We need to be very strategic in the next 5 years to see the region flourish."" (I14)</i></p> <p><i>"In order for Halls Gap to remain competitive as a tourist destination, new products need to be</i></p>



Ref.	Challenge	Justification	Opportunities unlocked should the challenge be addressed.	Some of what was said
		growth opportunities.	<ul style="list-style-type: none"> rural industry associated with value-add to Agriculture 	<p><i>introduced and reinvestment in existing accommodation, retail, dining and recreation products" (I14)</i></p> <p><i>"Without having business cases it is very difficult to secure funding - we need solid data and evidence to support investment attraction activities." (I26)</i></p>
3.6	Planning approval and policy	<p>Planning approval</p> <p>Council support through the planning permit application process was considered inadequate compared to other Councils.</p> <p>Specifically, it was reported that Council:</p> <ul style="list-style-type: none"> Don't always translate planning application requirements in a way a 'non planner' would understand, e.g. copying and pasting requirements directly from the scheme, when the scheme hasn't been written for the general public (legal language). Take an excessive amount of time to process applications Over complicated simple applications are reluctant to provide assistance to identify how to make a proposal align with the scheme <p>Planning policy</p> <p>Parts of the Planning Scheme don't align with current Council policy and community aspirations, creating issues such as:</p> <ul style="list-style-type: none"> land availability and security for industrial uses in Stawell and St Arnaud Threats to landscape and environmental values in Halls Gap the fragmentation of agricultural and industrial land through rural living development <p>Availability of suitable (development ready) industrial land</p> <ul style="list-style-type: none"> Availability of land is an issue, for large scale rural industry in both Stawell and St. Arnaud that meets key requirements including: appropriate zoning, lot size, proximity to sensitive uses, access to energy, water, fast and reliable internet and clear of old infrastructure. <p>Rural living & residential land fit/ready for the market</p> <ul style="list-style-type: none"> We have the potential to offer premium rural living product, but the planning scheme does not allow suitable subdivision sizes <p>The availability of land in Halls Gap for a larger eco resort development is limited and suitable land needs to be identified</p>	<p>Planning approval and policy shortfalls was seen as a barrier to attracting new investment and facilitating the growth of existing businesses.</p>	<p><i>"Our planning scheme is woefully inadequate. Planning structures need an overhaul. Also, the planning process takes far too long compared to other shires. There is an inherent confusion - for things to progress compared to other shires, eg. Bullock has a greater propensity to progress development due. Council should be providing investors with all the support they like, like you did with Gilmac" (I26)</i></p> <p><i>"The planning permit process scares people and they are baffled by the level of paperwork. It would be good if Council could help people through the process - and that doesn't seem to happen. The process needs to be transparent, there is a current lack of consistency."</i></p> <p><i>"Things take far too long compared to other shires. There is an inherent confusion - for things to progress compared to other shires, e.g., Bullock has a greater propensity to progress development due." (I26)</i></p> <p><i>"The biggest fear for many industrial businesses is residential buildings being too close and causing conflict. Council has let housing pop-up around industrial business which is causing challenges for existing businesses" (I19)</i></p> <p><i>"When looking for industrial land we would want to make sure we would have no limitations on hours of operations and noise levels" (I2)</i></p> <p><i>"Industrial land in Stawell is not very attractive because there is a lot of limitations on the land. The cost impact of 'clearing-up' existing industrial land (removal of existing old buildings etc)." (I2)</i></p> <p><i>"St. Arnaud Industrial estate is not set out to suit a variety/range of different industrial uses. The proximity to residential isn't suitable - the industrial estate has not been protected for nearly residential uses" (I38)</i></p> <p><i>"The Planning Scheme is not set up to create a rural living land opportunity. To make development more affordable, new development needs to be connected to electricity, have digital connectivity, have access to existing roads and be around 10 acres/4ha, 20 acres is too big for rural living. And people don't want to be more than 20 minutes from town." (I20)</i></p>
3.7	State Government investment in the Grampians National Park	State Government investment in infrastructure to support visitation into key sites in the Grampians National Park is critical to maintaining a quality visitor experience.	A lack of investment into National Park infrastructure will lead to a diminishing visitor experience through congestion and environmental impact. This poses a threat to growing visitor spend and attracting private sector investment.	"Need to develop more sites in the Grampians to take large numbers of visitors and disperse people out of the central corridor" (I14)



Ref.	Challenge	Justification	Opportunities unlocked should the challenge be addressed.	Some of what was said
3.8	Public land management in Halls Gap	The management of public land in Halls Gap was seen as being inconsistent and at odds with wider community and businesses aspirations.	<ul style="list-style-type: none"> Growth in visitor spend, including: <ol style="list-style-type: none"> investment attraction efforts in new products and reinvestment Increase the diversity and quality in culinary and retail offering and experience and build a strong reputation which supports 'lifestyle leaders' 	"There appears to be a lack of investment and forward thinking and planning when it comes to the majority of public land in the township of Halls Gap" (I6)
3.9	Demands on traditional owners	<p>Resourcing of Indigenous Land Councils.</p> <p>Pressure on our traditional owners to engage in a range of issues.</p> <p>Not having a registered Aboriginal party for the Grampians National Park.</p>	<ul style="list-style-type: none"> Growth in visitor spend in particular the opportunity to: <ol style="list-style-type: none"> develop Indigenous Cultural Heritage products in the Grampians National Park, Brambuk the National Park and Cultural Centre in Halls Gap Bunjil Shelter and Sister's Rocks out of Stawell, and leverage of world heritage listed 6,600-year-old Indigenous aquaculture region Budj Bim 	"Traditional owners have responsibilities across a lot of areas"
3.10	Funding for destination marketing	Only 1 in 10 people living in Melbourne know where the Grampians is. However, only 12% of Grampians Tourism budget goes into destination marketing aimed at increasing multi night stay and 24% of funding goes into post arrival visitor servicing.	<p>Need to maintain:</p> <ul style="list-style-type: none"> growth in visitor spend 	"Northern Grampians have low brand awareness." (I34)
3.11	Lack of visitor experiences/attractions and supporting collateral (Stawell and St. Arnaud)	A lack of visitor experiences/attractions and collateral was identified as a barrier to destination marketing and growing visitor spend for Stawell and St. Arnaud.	Need to facilitate growth in visitor spend in Stawell and St. Arnaud.	
Business Sophistication				
3.12	Industry networks (local and external)	<p>A lack of industry networking was identified as a challenge across a number of sectors including agriculture, hospitality, manufacturing and retail.</p> <p>Interviewees believed that a lack of industry networking challenged:</p> <ul style="list-style-type: none"> Halls Gap's capacity to ensure high quality visitor experience The regions capacity to build a culture of innovation and best practice <p>There was a sense that Halls Gap (as a collective) still has some way to go in delivering a visitor experience that meets the target market's expectations and that this may be due to a lack of industry experience and a wider understanding of the visitor economy.</p>	<p>Need to unlock:</p> <ul style="list-style-type: none"> Growth local business innovation Growth in visitor spend 	<p>"Businesses need to think outside and seek investment from outside investors - think outside the square and own the patch. (I33)"</p> <p>"Lack of collective approach from hospitality businesses to deliver a high-quality visitor experience as a region, where there is a culture of delivering best practice/high quality products regionally. Lack of understanding that as a region we are competing with other regions, not each other."</p> <p>Too often businesses will do only what is required to remain in business, as opposed to pushing the limits for the purpose of providing a more welcoming visitor experience (e.g. limited operating hours, investment in infrastructure and staff)." (I10)</p> <p>"There is a need to encourage a culture of working together to create a critical mass of high quality products - so that the region becomes known for its diversity of options and high quality service of offering." (I10)</p>



Ref.	Challenge	Justification	Opportunities unlocked should the challenge be addressed.	Some of what was said
Infrastructure & Essential Services				
3.13	Housing issues	<p>Almost all interviewees reported housing availability and suitability (in both rental and purchase markets) as being a key challenge to workforce attraction and retention.</p> <p>Key issues included a chronic shortage of rental accommodation in Stawell, St. Arnaud and Halls Gap, impacting business growth and sustainability.</p> <p>A lack of quality rental accommodation (suitable for both small and larger households) has created a barrier to securing skilled professionals in Stawell and St. Arnaud. Some employees reported that staff commute from Ararat and in some cases Ballarat due to a lack of suitable accommodation.</p> <p>A lack of housing for the temporary and seasonal Agricultural workforce in St. Arnaud is also a key issue. For example, hospitality businesses in Halls Gap are currently unable to keep up with visitor demand due to a shortage of staff and housing availability was identified as a key barrier to attracting and securing staff.</p> <p>In addition to the current shortage, a number of sectors (inc. manufacturing, mining and hospitality) reported plans to upscale quickly, either immediately or in the coming few years. The lack of rental housing was seen as a key challenge to attracting the workforce required to do that.</p>	<p>Housing issues were strongly linked to resident and workforce attraction and opportunities to capitalise on post COVID regional and rural migration.</p>	<p><i>"We have a real lack of short-term accommodation for construction projects - Council could promote the opportunity to build short term accommodation. (I40)"</i></p> <p><i>"Labour to support the Agricultural sector is needed and accommodation is short for both temp and longer term." (I9)</i></p>
3.14	Future proofing key transport routes to market	<p>Agriculture and manufacturing sectors generally felt that key transport routes to markets have improved over the years. There was also a belief that infrastructure needs to keep ahead of emerging and future vehicle sizes and types.</p> <p>Interviews revealed a mixed response to the feasibility and viability of rail.</p>	<p>Opportunities associated with export markets were seen as being contingent upon future proofing key transport routes, including:</p> <ul style="list-style-type: none"> • Intensive agriculture • Increasing mineral sands and gold mining • Value-added to agriculture 	<p><i>"Making sure our road transport routes to the Port of Melbourne keep up with the size of trucks (roads trains for example) to ensure that we can remain competitive in getting our production in the export market. E.g. there are a lot of bridges in the shire and there is a risk that if we are not keeping ahead of future vehicle types and major route are not up to standard" (I1)</i></p> <p><i>"We need to ensure transport routes to the port can take larger trucks" (I9)</i></p>
3.15	Educational infrastructure	<p>Access to tertiary education, technical and further education was identified as being a contributing factor to the outward migration of our young people to regional centres like Ballarat and Bendigo. Many interviewees believed that a lack of access to further education and training has acted as a key barrier to growth in Northern Grampians.</p> <p>With a greater number of courses being offered online, interviewees felt that should the regions digital connectivity shortfalls be addressed, access to tertiary education, technical and further educational infrastructure may not be as much of a limiting factor to the region's competitiveness into the future.</p>	<p>Needed to:</p> <ul style="list-style-type: none"> • Attract knowledge intensive businesses • Increase educational outcomes 	<p><i>"There has been a lack of investment in further education to facilitate and face to face components to create industry placements. Access to further education is important to maintaining a skilled labour force, in nursing for example, to create a ready supply for regional hospitals" (I13)</i></p>
3.16	Energy security and affordability	<p>With many rural industries being high energy users, and 'brownouts' reported in St. Arnaud,</p> <p>St. Arnaud industries noted the absence of natural gas and indicated a desire to move to renewable energy sources to drive costs.</p>	<p>A lack of energy security and affordability drives the opportunity to invest in renewable energy infrastructure.</p> <p>Addressing energy security and affordability was considered a key component to unlocking the growth potential in:</p> <ul style="list-style-type: none"> • value-added industries to agriculture, and • Advanced manufacturing 	<p><i>"The reason operations haven't been pursued many years ago has been access to power and water near where we raw material is" (I40)</i></p> <p><i>"We are a high energy using industry and we need to move to renewables and start putting back into the grid" (I20)</i></p>



Ref.	Challenge	Justification	Opportunities unlocked should the challenge be addressed.	Some of what was said
Human Capital				
3.17	Resident and workforce attraction	<p>Business growth and organisational capacity is challenged by the level and quality of professional experience moving into the area. Attracting and securing a skilled and experienced workforce was identified by virtually all interviewees as being a significant challenge to growing and remaining sustainable.</p> <p>Challenges included:</p> <ul style="list-style-type: none"> A lack of experienced hospitality staff experience is having an impacting visitor experience Attracting health, and other professionals Filling seasonal agricultural and rural industry jobs Attracting people with university qualification Availability of jobs with higher wages and salaries difficulty attracting people because of our location because people like to live closer to regional centres Securing a workforce who live and spend locally 	All opportunities	<p><i>"It is difficult to attract qualified staff due to distance from other high quality hospitality employers. To counter the challenges, we need to promote and create the conditions for an enhanced quality of life, along with investing in staff training and development to retain and grow the skills of staff and keep them engaged and committed" (I10)</i></p> <p><i>"We need to attract new people to come to the region to fill the jobs - we have lots of jobs, but don't have the skilled people to fill them." (I16)</i></p> <p><i>"We have jobs that we can't fill and three are other businesses that also have jobs they can't fill, but need to attract the right people (I20)"</i></p> <p><i>"We need to show our young people that there are opportunities to start businesses in their community...there is competition among employers in the area for quality/trained staff" (I38)</i></p> <p><i>"We need to attract 'quality people', skilled people" (I11)</i></p> <p><i>"73% (150) of our workforce reside within a 50km radius of Stawell Gold Mines, 14% (29) travel between 50-100km to work at Stawell Gold mines and then we have 13% (26) people who live over 100km away" (I13)</i></p>
3.18	Educational outcomes	<p>Educational outcomes, in particular in secondary education emerged as a concern to:</p> <ul style="list-style-type: none"> Supporting our young people to thrive Creating pathways to local skill shortages Attracting skilled new residents 	All opportunities	<p><i>"Education is an important consideration for families" (I39)</i></p> <p><i>"Schooling remains a big issue...the Standard of high School Education fluctuates." (I32)</i></p> <p><i>"We need vocational mentors in schools and groups to find out what opportunities are out there to make a good living and have great life in their own community...helping our young people find career opportunities in their own communities." (I38)</i></p>
3.19	Aboriginal cultural heritage and traditional owner acknowledgement	A number of interviewees identified an inadequate understanding of indigenous cultural heritage significance in Northern Grampians, and knowledge of our traditional owners by the wider local community as a barrier to both social and economic opportunities.	<p>This poses potential challenge to achieving:</p> <ul style="list-style-type: none"> The diversification of health care and social assistance Growth in visitor spend through developing indigenous cultural heritage products including products offered at Brambuk Increasing education outcomes 	<p><i>"The damage that's been done to sisters rocks (sacred women's site) has created so much trauma that has occurred on land in the Northern Grampians and it has caused a lot of pain - it's a long game. We need to build the foundation...the community needs to understand who our indigenous people are and build up an authentic recognition. We must respect the past and share the future" (I39)</i></p> <p><i>"Our people were the first group in Southern Australia to get positive determination...Benefits of indigenous tourism need to be shared equally. When we talk about opportunities to grow tourism through indigenous cultural heritage assets, we need to start by developing an authentic acknowledgment of indigenous people and cultural heritage" (I39)</i></p> <p><i>"The wider community doesn't appear to appreciate what we have in the way of indigenous heritage - the community as a whole has not shown that the indigenous issues are important, and that's concerning" (I34)</i></p>
3.20	Community acceptance of new technology	The readiness of our community to accept and adopt new technology in business, healthcare and education settings was identified as a posing a challenge to key opportunities.	<p>Opportunities most affected by this challenge include:</p> <ul style="list-style-type: none"> Growth in local business innovation Diversify healthcare delivery Increase educational outcomes 	



Ref.	Challenge	Justification	Opportunities unlocked should the challenge be addressed.	Some of what was said
Economic Fundamentals				
3.21	Condition of commercial buildings	The quality and availability of commercial buildings was raised as an issue in both Stawell and Halls Gap.	This was seen as a challenge to growing visitor spend, by acting as a deterrent to attracting operators with the knowledge and experience required to diversity and increase the quality of culinary and retail offering required to build a strong reputation which supports 'lifestyle leaders'.	<i>"A feeling that available commercial rental stock is old, expensive to rent and is impacting interest from high quality operators". (I10)</i>
Labour market efficiency				
3.22	Labour force characteristics	Labour force participation rates, welfare dependency and long-term unemployment were identified as challenges that require greater recognition in terms of the impact on Northern Grampians economic growth potential.	Labour force characteristics were identified as contributing towards challenges around resident and workforce attraction. Addressing these challenges was regarded as being necessary to unlocking almost all of our greatest opportunities.	<i>"We need to understand the impact of the disparity between the well-off and not well off - housing education, strong early life experience, transport and the flow on effect to the economy" (I29)</i> <i>"The level of disadvantage put a lot of people off". (I32)</i>
Natural Resources				
3.23	Climate Change	The impact of droughts and major weather events was described as being a 'given' by a number of interviewees, in terms of key issues.	Climate change was identified as being an influencing factor in future opportunity including: <ul style="list-style-type: none"> • Intensive agriculture • Value-added to agriculture 	<i>"Most growers are pretty good at adapting to subtle changes in environmental conditions and while it's a threat it also presents opportunities. I don't know of anyone is doing the same thing as they were 20 years ago, were all moving with the years and the climate and I think the industry is managing it pretty well as a whole" (I1)</i>

Table 7: Biggest challenges



4.4.4. Strongest drivers of changes

The following table provides a summary of what interviewees identified as being the strongest drivers of change within their sector.

Changes drivers	Description
Consumer demand	<ul style="list-style-type: none">• Increasing customer expectations for high quality food and beverage offerings, comparable to metropolitan areas.• A high and increasing desire to learn about indigenous cultures from both domestic and international visitors.• Consumers are concerned about environmental sustainability which will continue to drive change in the agricultural sector, including via Environmental and animal welfare policy• Changing expectations in the future aging population around standard of living and care, and more people may want to stay in their own home than go into residential care.
Technology	<ul style="list-style-type: none">• Advancements in technology will drive opportunities for greater:<ul style="list-style-type: none">○ Renewable energy technology○ Digital agriculture○ Advanced manufacturing• Increased expectation that all industries will embrace innovation and creativity to grow their business.• Increasing access to big data enabling data driven business decision• Increased access to online education, resources and systems.
Increase in visitor numbers	<ul style="list-style-type: none">• Increasing visitor numbers will drive interest in investment in order to keep up with demand
Land ownership	<ul style="list-style-type: none">• As land ownership changes over time new opportunities will open up through injections of fresh ideas.
Climate change	<ul style="list-style-type: none">• Climate change will lead to changes in what and how commodities are grown and produced
Workforce needs	<ul style="list-style-type: none">• Increasing expectations of staff to align with businesses that are keeping up with industry standards.• Growing need for a temporary labour force in the Agricultural sector.

Table 8: Strongest drivers of change



4.4.5. Things Council could do to address challenges and realise opportunities

This section summarises what interviewees said when asked what Council could do to address challenges and realise opportunities. Some interviewees identified what could be done when discussing the issues. Challenges and issues identified in the table above, along with the below table and findings of the data analysis and document review will be used to draft the strategy.

Topic	Role	Function description	Some of what was said
Climate change	Advocate	Meeting our energy needs from renewables was identified as a solution to addressing energy shortfalls and security, along with potential for Northern Grampians to lead the Grampians region in energy production and net renewable energy exports. Council was identified as being in the ideal position to raise awareness and spur emission reduction by taking local action and advocating for regional climate change action to reduce our carbon emissions to net zero.	"Our region is already leading the pack on renewable energy, and have shown that we can be innovating and collaborate across sectors" (I29)
	Facilitate	Take climate change action by meeting our energy needs from renewables <ul style="list-style-type: none"> Education programs to reduce energy usage. Investigation of microgrid opportunities for self-sufficient, reliable and affordable power. Take collaborative action by engaging with governments and energy companies to establish community benefit programs. 	"We have the opportunity to deliver more renewable energy. There is the potential for farms/business to be self-sufficient in terms of energy production and use" (I29)
Natural and cultural assets	Advocate	Council was identified as being best placed to advocate for greater recognition of and investment in natural and cultural assets including: <ul style="list-style-type: none"> Supporting the bid for Victoria's Goldfields to be given UNESCO World Heritage status Support for enhanced community understanding and knowledge of current mining opportunities and significance Increased State Government investment into the Grampians National Park 	"We would like to work with the Council to help people accept that mining and communities can co-exist (agriculture and community) partners to show that together we are adding value to our region". (I40)
Our Indigenous communities	Advocate	It was seen as being necessary for Council to take a leadership role in achieving positive outcomes for our indigenous community by: <ul style="list-style-type: none"> Acknowledgment of local indigenous cultural heritage. Advocating for increase Aboriginal businesses in the region. 	"There is a need to not only focus on outcomes for the wider the community but the needs of the Aboriginal community" (I39)
	Facilitate	Taking action as an organisation was seen as an important step towards forming meaningful partnership with Traditional owners, including: <ul style="list-style-type: none"> Flying the Aboriginal flag Recognise significant days and events (e.g. Reconciliation Day, NAIDOC Week) Aboriginal acknowledgment in Council's opening pray and in Council documents Cultural heritage awareness training Creating opportunities for an open and transparent conversations at high levels Policy on local providers and weighting local providers in tender assessments. Support for new business owned and operated by traditional owners Protection and management of significant sights on public and Council land 	"This happens at the Council level and grows from there - start small. This is a good opportunity for Northern Grampians to identify one or two change champions. (I39)
Health, wellbeing and education	Advocate & Facilitate	Greater collaboration and partnerships with the health, human services and education sector on strategic planning and projects was associated with achieving better outcomes. Making stronger connections with schools to enhance student pathways to local skills shortages was a consistent theme.	
Workforce and resident attraction	Facilitate	Interviewees across all sectors saw the Council as being key to promoting the region, connecting employers and employees and leveraging off the lifestyle and amenity benefits delivered by tourism. Acknowledge and enhance the link between the lifestyle and amenity benefits delivered by the tourism sector to attracting and retaining a skilled workforce for other sectors like health and human services.	"Businesses need support in attracting skills to the area." (I19) "...marketing what Stawell is about - what the region has to offer - a community village (I18)"



Topic	Role	Function description	Some of what was said
			<i>"We need to market ourselves - but we need to address the barriers to growing the community. The basis is there for liveability and growing e.g. with Cato Park - north park." (I16)</i>
Housing diversity and quality	Facilitate	Facilitate local action to address our housing issues across each of the townships, tailored to specific housing issues.	<i>"The opportunities for action at a local level need to be mapped out...there is a conversation to be had on the accommodation issue" (I29)</i>
Business and service agency networks and mobilisation of local resources	Facilitate	<p>There was a sense that Council should be facilitating stronger local business and service agency networks to mobilise local resources and greater collaboration (efficiency).</p> <p>This included:</p> <ul style="list-style-type: none"> Greater communication, collaboration and partnerships across Northern Grampians largest employers and service providers working closely with the community to facilitate community driven action facilitate local business networks to build a culture of collective impact and being 'part of a team' - not in competition with each other but other regions. Tapping into local leaders/change drivers to facilitate local action by: <ul style="list-style-type: none"> Establish an Economic Development Committee Providing leadership to stimulate community investment models (e.g. co-operative) to facilitate projects that address key issues. 	<p><i>"Council needs to provide support and encouragement. The community need this from people that can make help make it [their ideas] happen" (I38)</i></p> <p><i>"Let's use the human resources that exist within our own community. Establish groups with a specific focus and a clear remit. Council staff need to work with local groups on specific economic development target areas - to help develop concise project briefs for example. An 'Economic Development Committee' would need to be led by people who run business - people that have the smarts and that can provide good solid information - a committee need to be empowered - like advisors - go beyond normal Council remit" (I26).</i></p>
Business training opportunities	Facilitate	Promoting business training delivered by other organisations emerged as a role for Council, however delivering was offered viewed as a duplication of effort.	<i>"The hospitality industry taps into operations support from their industry association and that there is duplication of effort in the delivery of things like workshops - they are offered through Business Vic and Industry associations" (I10).</i>
Investment attraction efforts	Facilitate	<p>Investor briefs</p> <p>Council was suggested consistently as being best placed to facilitate the delivery and use (to attract investment) of investor briefs (investment prospectus) for specific sectors or opportunities.</p> <p>Collaborating and partnering with:</p> <ul style="list-style-type: none"> Agricultural sector organisations (e.g. Wool Corp., Oilseeds Federations, Grains Australia), Banks and Superannuation companies to support funding for feasibility and business cases for value-added industries to Agriculture. Universities to identify ideal value-add opportunities, markets and technology (funds and knowledge) Evidence based feasibility studies and business cases were considered to be important tools in Council's investment attraction efforts. <p>Investment concierge</p> <p>Many interviewees want to see Council take a stronger approach to attracting and supporting potential investors. This included:</p> <ul style="list-style-type: none"> Identifying land development options on behalf of industry Marketing and promoting the business advantages of the region. Providing a strong, positive first impression to interested businesses. Being a single point of entry, information provision and communication or investors Work with site selectors to showcase available commercial space, and to close location deals with companies. 	<p><i>"Council's role is to take the leadership to network and be a relationship manager with partners like universities. For example, Victoria University and Ballarat University are looking towards the west of the state for research projects and they would be keen to partner. Partnering with Universities will provide the data that investors and the State and Government will listen to. This will allow the Council to secure funding for development. Superannuation companies have a \$3 Trillion dollars base and largely focus on offshore investment, but we should be drawing the focus to Australia. We need to find out how to tap into Superannuation" (I26).</i></p> <p><i>"The more business we entice to our shire the more skills required, the more skills we attract, and more wealth is generated in our community. I would like to see another industry in St Arnaud that employs another 50-60 people - north of town where there is water e.g. mushroom grower that can make use of by-products - get industry to feed off other industry (Value-added)." (I20)</i></p> <p><i>"What are the larger farming bodies doing with their levies? Agricultural bodies that do work for farmers should be contributing towards identifying opportunities for Agricultural investment and advancement and should be contributing towards to cost of the investigations required" (I16)</i></p>
Localised visitor experiences and products	Facilitate and Deliver	<p>Council (in partnership with the community and tourism sector stakeholder) were seen as being best positioned to identify and curate local brands (unique identity and characteristics of Stawell and St. Arnaud), stories and experience based on significant and unique historical, cultural and landscape values.</p> <p>This was seen as being needed for effective destination marketing, as well as enhancing community pride and sense of place.</p>	<i>"Stawell and St Arnaud tend to feel left out when it comes to regional destination marketing. To support destination marketing efforts we need to identify what is unique to our townships and rural landscapes, and identify what 'products' or experiences could be developed" (I34)</i>



Topic	Role	Function description	Some of what was said
Expansion of existing growth focus businesses	Facilitate	Invest in businesses that invest in the region - focus on business with existing momentum and growth potential.	<p>"Council should be working closing with businesses who have a demonstrated capacity to meet market expectations and who invest in the region - focus on supporting business where there is evidence of return for effort" (I12)</p> <p>"Council needs to send a message that they will work with those businesses to 'clear the path' for growth to create more jobs and generate more wealth and lifestyle benefits to the region" (I24)</p> <p>"Finding those enthusiastic, entrepreneurial and forward thinking members of the community to help mobilise and facilitate their visions - we don't have a lot of contact with these people". (I18)</p>
Economic reporting	Deliver	Report on economic indicators, monitor and evaluate the economic impact of efforts using big data and other sources to monitor in real time the impact of activities and programs on economic activity.	"Council could partner with businesses to gather data they collect to monitor economic performance etc." (I10)
Infrastructure	Deliver	Provide the infrastructure and assets to create conditions for Economic Development, enabling development including quality public realm.	
Statutory planning, building, environmental health and local laws services	Regulate	<p>Streamline approval and planning permit process.</p> <p>Planning Scheme provision and local laws provide Council with a mechanism to regulate certain activities in the community and influence economic activity.</p> <p>A friendly local regulatory environment to support and facilitate development opportunities.</p>	
	Regulate	<p>Enforcement</p> <p>Impressions count - set up the plan to support the type of development that we want and crack down on development we don't want to see. Planning enforcement needs to be consistent</p>	
Planning Scheme management	Regulate	<p>Ensure the planning scheme remains in line with community aspiration to avoid land use conflicts and planning approval barriers, including:</p> <ul style="list-style-type: none"> Ensuring the planning scheme facilitates quality commercial building investment to protect our key township destinations from poor amenity created by low quality development. Ensuring rural industry is protected from residential land use conflict. 	<p>"Council needs to make sure the Planning scheme is kept up to date - at the moment industrial businesses are under threat from current and future residential encroachment. This is a real threat to existing business and a real determinant to potential new industry". (I33)</p> <p>"We have issues with our rural living land - 20ha rural land use is too large and attracts poor development, like shipping containers and it's a disgrace. 5ha is a good size like Spring Gully in Bendigo. We have a mismatch of planning control. As a business owner it worries me going forward." (I20)</p> <p>"We should set up rural living lots South of St. Arnaud, where this is water - amenity (bush) - direct people to the south and industry to the north where the services are - area for 5-10 acre lots - to put people in the right area (North is industrial)" (I33)</p>
Strategic planning	Plan	<p>Economic Development Strategic Planning</p> <p>Council must be specific and clear about economic development priorities.</p> <p>There is an opportunity to align with State and Federal strategies (e.g. the Australian Government's Modern Manufacturing Strategy)</p>	<p>"We cannot be bland and vague - less is more - Council must be specific and clear about what the economic development priorities are. Leadership must focus on strengths - take leadership that plays to our strengths - present opportunities for skilled people and they will come". (I26).</p> <p>"We need a strategy that drives the whole shire forward - a clear and succinct document and a clear list of the things we will focus on.</p> <p>We need to break out - out of the box thinking - do something different - get people to stand up and take notice - Government is on a path to stimulate" (I26).</p>



Topic	Role	Function description	Some of what was said
			<i>"The community needs to know what the target is and have a clear understanding of what needs to be done to make things happen. We need actions - short term (quick wins in 12-18 mths), medium and long term. And the strategy needs to be properly resourced" (I26).</i>
	Plan	Visitor economy planning Alongside the development of located visitor experiences and products, the need for township tourism strategy was identified.	<i>"What is the vision for the Tourism offering in Stawell and St. Arnaud and what infrastructure is required to achieve it." (I14)</i>
	Deliver	Accommodation (visitor) supply and demand assessment.	<i>"A project that identifies when accommodation will be a saturation and when capacity is outstripped - when it will become critical in our region and what needs to be done to avoid visitor expectations dropping off. We need data to show occupancy and visitor numbers to map out when we will run out of available occupancy and surplus required to meet visitor demand". (I14)</i>
	Plan	Land use planning (including town and rural land) to ensure clear, consistent and appropriate planning, including appropriate land zoning.	Supporting business like Eventide to identify and secure land for the future for retirement - NDIS housing - strength in building houses. Issue around expansion - issue around land security - opportunity to be more strategic around land use. Ensure what we can offer people in terms of quality rural living land is also planned for - and not in conflict with current and future industrial land.

Table 9: Things Council could do to address challenges and realise opportunities



5. Appendix

5.1. Appendix 1: Themes: economic drivers that determine longer term competitiveness

Adapted from [In]sight 2014, second iteration of Australia's regional competitiveness index, Regional Australia Institute Available at: <http://www.regionalaustralia.org.au/home/wp-content/uploads/2015/10/InSight-User-Guide-Revised-30-06-2016.pdf>

Theme
Institutional Foundations: Administrative support for regional development. Regions that are able to mobilise local resources are more likely to be successful than those who submit to the influence of external forces. Institutions are crucial to this mobilisation of resources in any region. Institutions are important because they facilitate negotiation, dialogue and collaboration among key actors in a region. Institutions also enable a region to exert external influence by engaging on behalf of the region with higher levels of government and other external actors important to a region's economy (such as major corporations or potential investors).
Natural Resources: Availability and use of natural resources. Much of economic activity in regional Australia is directly linked to local natural resources. Access to Natural Resources can create economic opportunities through offering inputs to production (such as access to water or good quality soil), and can be used to generate production outputs (such as minerals or extractives) or as a foundation for services such as tourism and recreation. The nature of a region's physical endowments, in terms of both the access to natural resources and the physical attributes of the region, are hugely influential in many regions' current economies and future opportunities. Natural Resources are a component of a region's competitiveness that is relatively difficult or impossible for regions to meaningfully influence. As a result,

Theme
Technological Readiness: Access and utilisation of new technologies. Technological Readiness is an important facilitator of internal regional growth. The physical location of a person or a product is increasingly less important in the Australian and international business environment. Communication technologies are now essential to efficient commercial practices and productivity. They are transforming the way industries operate, propelling Australia's previously isolated regional economies into national and global markets. A region's Technological Readiness or its ability to rapidly absorb and make use of new technologies is now a vital determinant of competitiveness.
Labour Market Efficiency: Use of the potential regional workforce by the economy. Labour Market Efficiency measures how well a region engages its people within the economy. Efficiency suggests a strong matching of workforce size and skills to the needs of local firms. Maintaining efficiency over time suggests an adaptability of workforce size and skills to changing needs. Employment rates indicate the current level of demand relative to supply of workers in the region. Unemployment may also reflect a mismatch between the local labour force and firm needs. The level of utilisation of the potential workforce indicates whether a region has longer term structural challenges in achieving Labour Market Efficiency. The presence of long-term unemployment, lower participation rates and/or high welfare dependence suggests longer term efficiencies issues in a region. Skills are also important, and most regions will need a mixture of skilled and unskilled labour. A lack of skilled labour will limit the sophistication of local firms and the adaptability of the economy to changing needs.



Theme	
	less competitive regions have limited scope for improving their competitiveness over time through development efforts. The challenge for regions is in translating their competitiveness into economic opportunities through the way in which local resources are used in the economy.
	Infrastructure & Essential Services
	Access to infrastructure, transport and services.
	Infrastructure and Essential Services facilitate economic activity. A region that is well connected to external markets and has good access to essential services best enables businesses to compete in the wider economy and the facilitation of new investment.
	Transport infrastructure - roads, rail, airports and ports - are critical to the efficient delivery of goods and services and support a region's competitiveness in economic markets by reducing freight costs. Educational infrastructure is a vital component in the development of a region's population.
	Measures of access to primary, secondary, technical and further education and tertiary education, indicative of a region's ability to develop a skilled and productive workforce.
	Health infrastructure - access to medical facilities, allied health and GP services - supports the ability of a community to support a healthy workforce.
	Economic Fundamentals:
	The general economic climate of a region.
	Solid economic fundamentals support local businesses and workers and indicate a region successfully translating economic potential into activity and growth.

Theme	
	Business Sophistication:
	Capacity of business to respond to competitive pressures.
	Firms provide a majority of jobs for most communities and ensure local resources and the potential of a region can be translated into economic success.
	A region with a more diverse business community, profitable small businesses and good local access to financial expertise and facilitators of exports, imports and wholesale trade is best positioned to compete in Australia's economy
	Demography:
	The characteristics of the local population.
	The inclusion of the Demography recognises the importance of people and population to a region's competitiveness. Demography is difficult to change through regional development. History, wider demographic trends (such as an ageing population) and national trends shape a region's competitive position. Demography is something that each region must work with to succeed.
	Each region has its own demographic profile. For instance, large populations attract a diverse range of businesses, which find it convenient to be located near other



Theme
Human Capital:
<p>The capabilities and skills of the workforce of a region.</p> <p>Strong Human Capital allows communities and the individuals within these communities to be more productive and more able to respond to shifts in the economy.</p> <p>Two indicators measure the availability of technical and university qualifications in a region. Having a large proportion of the workforce with a technical or university qualification is essential to competitiveness.</p> <p>Improving health in the community provides a pathway for building a more competitive economy over time.</p>

Theme
<p>relevant businesses, forming agglomeration economies. However, population change – growth, loss or turnover – affects employment or lifestyle opportunities. A stable population supports the formation of social capital.</p>
Innovation:
<p>Start-ups, business accelerators, co-working spaces, entrepreneurs, new products and services and innovative businesses are emerging.</p> <p>Spreading the Ideas Boom, highlights the growth of vibrant and dynamic entrepreneurial communities in regional Australia and areas where conditions are ripe for innovation</p> <p>Innovative capacity and outputs through R&D and business dynamism</p>



5.2. Appendix 2: Structured interview questions and online survey

Base questions	Prompts 1	Prompts 2
Opening	<p>Introduction and thanks for participating.</p> <p>About the project.</p> <p>Housekeeping:</p> <ul style="list-style-type: none"> Your name will not be used in public reports Your response will be used to report under themes Do you give consent for the interview to be recorded for the purpose of transcribing? 	N/A
Business type/industry	<ul style="list-style-type: none"> Can you tell me about your business? How many people do your business employ other than the owner? 	<ul style="list-style-type: none"> How do you describe your business to a potential customer (what are your major activities)? When did you establish your business in NG?
<p>What are Northern Grampians Stand out strengths?</p> <p>Regional assets and strengths (value proposition)</p>	<ul style="list-style-type: none"> Why is your business located in where it is in Northern Grampians? Do you live in Northern Grampians? 	<ul style="list-style-type: none"> What do you love about doing business here? What are the few big events that have got your business/organisation to where it is today? What keeps your business here? What other locations might you consider? Would your organisation perform at the same level in another location?
What are our greatest opportunities?	<ul style="list-style-type: none"> Do you see opportunities for growing sales/trade with customers outside NG? 	<ul style="list-style-type: none"> Do you see opportunities for growth trade outside Northern Grampians? <ul style="list-style-type: none"> What do you need to help seize these opportunities? Do you see how value could be added to the Northern Grampians economy by your industry or associated industries? What investment opportunities should be explored for Northern Grampians that build on our existing strengths/competitive advantages, momentum and existing investment?
Evidence is there of specialisation	<ul style="list-style-type: none"> Are there things that you offer/do differently from others in your industry? 	<ul style="list-style-type: none"> What is different about what you offer? Does the firm have processes or equipment that are unique regionally/nationally? What are the most complex activities the firm undertakes?
<p>Markets</p> <p>(exports, imports, local sales), customers.</p> <p>Linkages to the local economy.</p> <p>Industry trends</p> <p>COVID-19 impacts</p>	<ul style="list-style-type: none"> What can you tell me about your customers? 	<ul style="list-style-type: none"> [performance] Growth in demand? [export or local sales] Who are the major customers/markets? <ul style="list-style-type: none"> Does the firm have any markets outside the region (where)? What proportion of total demand (sales) do they account for? Do you have markets in Northern Grampians (who/what local firms to you supply)? How long have you had these customers (outside and local)? International experience? [imports or local] Who are your major suppliers (Equipment suppliers/servicing, Freight/logistics) and where are they located? <ul style="list-style-type: none"> Could you access more intermediate goods/services locally? What input supply gaps do you have? [trends] What are the current industry trends? <ul style="list-style-type: none"> Q. re: testing impact of global and national trends locally Reference to COVID-19 impacts Growth niches? How is the sector changing? Which trends are having a major impact? <ul style="list-style-type: none"> How might that play out over the coming years?
<p>Suppliers.</p> <p>Supply chain</p>	<ul style="list-style-type: none"> What can you tell me about your suppliers? 	<ul style="list-style-type: none"> Who are the major strategic suppliers? (i.e., non-commodity) <ul style="list-style-type: none"> Regional? National? International? Are suppliers reliable? Seasonal disruptions? Is competition intense, mild? What are your main supplier headaches? How are suppliers organised? Do cooperatives or others regulate their functions? <ul style="list-style-type: none"> If so, are they market efficient? Freight logistics? Transport disruptions?
Current investment priorities.	<ul style="list-style-type: none"> Do you see your business changing/evolving in the future? 	<ul style="list-style-type: none"> Describe how your organisation might look in a few years' time, optimistically but realistically? <ul style="list-style-type: none"> What should start to happen right now to achieve this? What are the firm's major innovation directions/What potential do you see for innovation and transformation of your



Base questions	Prompts 1	Prompts 2
innovation performance		<p>business?</p> <ul style="list-style-type: none"> ○ Who are the firm's partners/collaborations in achieving innovation? • What are the one or two things that really drive results for your organisation? • Does the firm have any engagement with the digital economy? <ul style="list-style-type: none"> ○ Internal systems ○ Ecommerce ○ Planned investment in digital systems • What potential do you see for innovation and transformation of your business? • What are the firm's major innovation directions? <ul style="list-style-type: none"> ○ Who are the firm's partners/collaborations in achieving innovation? ○ Is the firm aware of related start-ups, spin-offs, scale-ups? • Has your level of revenue changed in recent years? <ul style="list-style-type: none"> ○ Why?
<p>What are our biggest issues, barriers and challenges to growth?</p> <p>Strongest drivers of change</p>	<ul style="list-style-type: none"> • Can you tell me about some of our biggest challenges and those faced by your sector? 	<ul style="list-style-type: none"> • What would cause the business to relocate/exit from Northern Grampians? • What is holding you back from doubling your activity/? • What are some of the limitations/challenges to the expansion of your business or the sector you work in / What constraints are there holding the firm back from achieving significant growth? (limitation to growth). <ul style="list-style-type: none"> ○ Are there gaps in infrastructure, skills, training that constrain the firm? • What needs to change, within and beyond your organisation ... structurally, culturally, whatever ... to achieve your optimistic scenario? • What opportunities has COVID-19 presented? <ul style="list-style-type: none"> ○ How can these be harnessed by your business? • What are the key challenges presented by the conditions presented by COVID-19? <ul style="list-style-type: none"> ○ What opportunities are there to overcome these? • What do you see as their key impacts on your business/industry through Climate change? <ul style="list-style-type: none"> ○ How do you see your business can best adapt or build resilience?
Soft infrastructure, attracting and retaining staff	<ul style="list-style-type: none"> • What are some of your most valuable networks and support structure in your business? 	<ul style="list-style-type: none"> • How available and effective are industry associations, chambers of commerce, business assistance centres? • Do educational institutions supply a sufficient number of qualified staff? • Where does the firm look for training/skills development? <ul style="list-style-type: none"> ○ Does the firm have any engagement with a TAFE, university or research body? • Who do you turn to beyond your organisation for technical advice? • What is the extent of interaction between businesses and support organisations? • Do firms share knowledge? • [social capital] - What would build stronger networks (bonds, bridges and linkages) with your <ul style="list-style-type: none"> ○ 1. learning, ○ 2. work ○ 3. leisure ○ 4. home and ○ 5. public, life. • [human capital] How could our region be better placed to support you to build your skillset, level of education, employee's collective skills, or knowledge in order to enhance your skills and your staffs?
Entries & Exits	<ul style="list-style-type: none"> • What can you tell me about your competitors? 	<ul style="list-style-type: none"> • Who has entered the industry this year? • Who has exited? Any multinationals? • What are the main difficulties in establishing a business? • What other companies would you like to see based in this region?
<p>What could be done to address our challenges and release our opportunities?</p> <p>Council and other stakeholder support</p>	<ul style="list-style-type: none"> • What action could Council take to support your sector? 	<ul style="list-style-type: none"> • Activities, programs, advocate, partner, investigate etc. • How might Council initiatives help your organisation?
<p>On exiting:</p> <p>Vision for the future Economy</p>	<ul style="list-style-type: none"> • In 10 years, what would be the ultimate description of our region's economy and community? 	<ul style="list-style-type: none"> • Describe your ideal future economy for Northern Grampians - in 10 years what would be the ultimate description of our region's economy and community?
On closing	<ul style="list-style-type: none"> • Who else do you think should I talk to to better understand your sector? 	



5.3. Appendix 3: Online survey

Northern Grampians Shire Council is preparing a new economic development strategy which will identify opportunities, and constraints in each industry sector and will guide the Shire's long-term directions and work program in economic development over the next ten years.

The overarching goal of the strategy and action plan is to put our economy on a path of higher growth, to build our communities economic well-being and quality of life.

As part of this project, we are compiling profiles of local businesses and other organisations to help in assessing the outlook for our towns and to collect ideas on economic development issues and future opportunities.

Completing this form will greatly assist in providing information and directions for the new Strategy.

Name

Phone

Email

Postcode

1. Name of Business or Organisation

2. Location (i.e. town in Northern Grampians)

3. Types of products or services provided?

4. How long has the business/organisation been operating in Northern Grampians Shire? (in years)



5. How many people does the business/organisation currently employ (including owners) in Northern Grampians other than the owner?

Full time	
Part time	
Casual or seasonal	

Where do these employees live?

	Number of employees
This town	
Elsewhere in Northern Grampians Shire	
West of the Shire (e.g. Horsham or Donald)	
East of the Shire (e.g. Ararat or Maryborough)	

6. Do you expect the business to employ more, less or the same number of staff in 12 months and 3 years' time?

	12 mths ✓	3 yrs ✓	If more or fewer staff, approximately how many (+ or -) in 12 months and 3 yrs.
Additional staff expected			
No change expected			
Reduced staff expected in 12 months			

7. Are the following factors strengths or weaknesses, for your business/organisation, in your location within Northern Grampians Shire?

	Strength	Weakness	Not Relevant
Lack of competition			
Good technology and equipment			
Fast and reliable internet access			
Communications/accessibility to internet and mobile connections			
Attitudes of the community in this town			
Skills of the available workforce			



Loyal local customer base			
Ability to be flexible in meeting customer needs			
Access to raw materials (such as grain or stockfeed)			
Access to freight and logistics services			
Planning controls that protect business investment			
Availability of local suppliers for equipment, maintenance and trades			
Accessibility to processors or other supply chain links			
Accessibility to markets			

Are there any other factors that help or hinder you in growing, or sustaining your businesses?

8. How important are the lifestyle and community/social services of your business/organisation in Northern Grampians both for you and your staff, and how would you rate these aspects in your town?

	Importance of this lifestyle/community services ✓			Rating of these services in your town ✓		
	Very Important	Of some importance	Not important/ not relevant	Excellent	Average	Poor
Lifestyle Services						
Health and Wellbeing						
Recreational and Sporting opportunities						
Suitable housing and housing affordability						
Art and culture						
Access to health services						
Education services						
Public/community transport						
Trades (plumbing, electrical, etc)						
Food services (cafes, hotels, restaurants)						



Fast and reliable internet						
Public transport to Melbourne						
Community and Social Services						
Access to family and friends						
Strong local social networks						
Community pride						
Community support for businesses						
Council support for businesses						

Please use the space below to comment further on the needs and problems associated with any of the services in the above table.

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9. Details of any business and community groups (in which you or other staff in your organisation are involved) - such as associations, tourism groups, cooperatives or town committees?

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10. Are there any barriers to new business investment or growth in your town?

	Major barrier	Minor barrier	Not a barrier
Planning regulations and permits			
Land zonings			
Access to commercial finance			
Building approvals			
Skills shortages			
Technology and technology support			
Freight services			
Rental housing for staff			
Housing for sale (for staff)			
Childcare services			
Communications infrastructure			
Gas			
Water			
Power			
Fast and reliable internet access			

Other (please specify)

--

11. Would you like to comment on the commercial and industrial areas in town, and any potential for new development? (the current situation in town, gaps and/or opportunities)?

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12. Which of the following, do you think, should be among the broad roles for Northern Grampians Shire Council?

	Critical role (must be part of future work programs)	Important role (a key focus for the future)	Minor role (could be of relevance)	Unlikely (should not really be part of the economic development role)	Not at all (Economic Development staff should not be doing this)
Advocating and lobbying with Governments on behalf of Northern Grampians businesses					
Disseminating information on business training, legislation, events and grants					
Assisting businesses with grant and other finance applications					
Representing Northern Grampians on regional economic development organisations					
Promotion of investment in Northern Grampians through prospectuses and investment guides (for example on food processing, intensive livestock, horticulture, and tourism)					
Promoting/marketing of industrial and commercial properties					
Assisting business investors to find land and work through planning and establishment issues					
Facilitating cooperation/collaboration between local businesses (such as joint purchasing, shared equipment or infrastructure, buy-local campaigns)					
Investigating viability and feasibility of the potential for new investment					



Any other suggested roles for Council? (please specify)

13. If you have any other suggestions or comments on Economic Development opportunities for Northern Grampians please make them here.

Many thanks for your time and valuable contributions to Council's Economic Development Strategy.

Picture of the future

A vision statement is a description of our ideal future, what we want Northern Grampians to be known for and how we wish our community to feel about Northern Grampians.

The following vision statement has been developed as a starting point, to be tested with the community and refined.

In ten years Northern Grampians will be one of **Victoria's most thriving, safe and accessible** rural regions, renowned for being **proud, diverse and resilient, from our economy to our communities, heritage and landscapes. Creativity** and **innovation** support our **productive** and **sustainable** region.

How closely does this picture of the future align with how you would like to see Northern Grampians in the next 10 years?

- Not at all
- Somewhat
- Exactly

What should be added or removed?