

The Cradle Coast Regional Futures Plan 2019 - 2022



Full Version (Technical Report)

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26 November 2018

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Document Control

Document Revision Type	Date Issued	Issued By	Issued To	Approved By	Date Approved
1.0 - Draft	12/11/18	Peter Murden	Daryl Connelly	Daryl Connelly	12/11/18
1.1 - Draft	13/11/18	Peter Murden	Daryl Connelly	Daryl Connelly	13/11/18
1.2 - Draft	14/11/18	Peter Murden	Daryl Connelly Reference Group CCA Chair CCA CEO	Daryl Connelly	14/11/18
1.3 Final Draft	15/11/18	Peter Murden	Daryl Connelly Rodney Greene	Daryl Connelly	15/11/18
Final Technical Report	26/11/18	Peter Murden	Daryl Connelly Sid Sidebottom	Sid Sidebottom	26/11/18

Background to the development of the Cradle Coast Regional Futures Plan

CCA undertook to develop the Regional Futures Plan as more needs to be done in regional and economic development if we want:

- An agreed direction and approach to develop the region's economy, with a focus on the role of place in influencing economic outcomes
- To connect identified regional priorities and investment opportunities directly with the Tasmanian and Australian Governments' decision-making processes
- Continued sustainable economic and jobs growth and improved living standards

Initial consultation and desk top analysis confirmed that several systemic / entrenched issues are constraining our local and regional economies and that a regional approach to tackling these issues was warranted. However:

- There is little appetite to revisit or duplicate the previous North West Regional Economic Development Plan (2014) – the more relevant actions have already been or are being implemented by industry and / or government
- Economic development is already a crowded and contested space, so the Plan should address complex challenges in ways that would not be possible separately
- Consultation / engagement should be limited and targeted – the region has been over-consulted in recent years

The aim has been to produce a Plan that:

- Enables engagement between local and regional leaders to build a strong level of commitment and shared responsibility for its implementation
- Includes formal commitment from major stakeholders to be active participants in its implementation
- Is systemic, networked, cross cutting and agile
- Creates a collective commitment to a common set of regional investment priorities that will contribute to the highest regional impact
- Ensures key regional priorities and investment opportunities are connected directly with the Tasmanian and Australian Governments' decision-making processes
- Is about turning identified investment priorities into practical and achievable actions - manageable within resources available (or limited external assistance)
- Aligns effort to identify specific actions / interventions that can happen now, and where collective success will create regional impact and momentum with flow on effects
- Provides a path and a place to get started and achieving outcomes early

The Cradle Coast Authority – Councils Working Regionally

West and north-west Tasmania (the Cradle Coast) comprises places and communities linked by strong geographical, social, cultural and economic relationships and mutual interdependence. These places and communities are supported by the region's 9 collaborative councils.

The Cradle Coast Authority (CCA) is owned by these councils and it exists to make it easier for them to effect positive change at the regional level. This Futures Plan, developed by CCA on behalf of our member councils and other key regional stakeholders, is one such response.

While the Futures Plan is a plan for the region, as opposed to a plan for the CCA, we have a vital role to play in its implementation. Like all CCA's work, this role is undertaken on behalf of our councils.

Our councils recognise the importance of working together to tackle complex problems that cannot be dealt with individually. We value and respect their contribution to the development of the Futures Plan and their ongoing role in shaping its implementation.

The new Regional Governance Framework, developed as part of this project, complements and builds on the effective individual and collective engagement between our councils and CCA. The councils' involvement in this ambitious project has contributed to the development of a shared agenda that provides the opportunity to extend these positive relationships and sets a positive tone for the future.

The identified regional challenges that the Futures Plan will address, impacts our regional and heartland economies in different ways. While planning regionally is important for developing economies of scope and scale, related action needs to be co-designed and implemented locally. Our Councils have a key strategic and operational role in supporting local action that will contribute to collective success.

The Futures Plan and proposed governance arrangements provide a crucial platform for working collaboratively across sectors, organisations and boundaries on the complex challenges that are not effectively being dealt with separately. While the responses to these challenges often need to be industry led, CCA and our councils have an important role in championing these new ways of working better together.

The project brought together the knowledge and experience of the region's industry, government and community leaders to develop the Futures Plan. We value and appreciate their contribution and look forward to working with them again in the implementation phase.

I would like to pay tribute to the members of the project's reference group – Mike Brindley, Rodney Greene, Lara Hendriks, Sarah Jones, Danielle Kidd, James McCormack, EJ Shu, Brett Smith (CEO) and Kent Wyllie. Their expertise and enthusiastic contribution to the process is greatly appreciated. I also wish to thank all our staff for their involvement, especially Peter Murden and Daryl Connelly who led this ambitious and complex project.

The project was co-funded by the Australian Government, through its Building Better Region's funding program. We thank them for their support.



The Hon. Sid Sidebottom
Chairperson

Table of Contents

Executive Summary	7
1. Introduction.....	12
2. Understanding the socio-economic context.....	14
a. The region's integrated, geographically distributed local economies.....	15
b. The demographic structure of the region.....	17
c. The drivers of regional economic growth	19
d. Cluster development as a core strategy to drive regional economic growth.....	22
3. Barriers to growth and more jobs, better jobs	23
a. The Evidence - More jobs and better jobs are coming, but....	24
4. The Cradle Coast Regional Futures Plan (2019 – 2022)	30
a. Strategic agenda - Creating more jobs and better jobs for the Cradle Coast.....	30
b. Context for the Futures Plan	30
c. Assets and strengths on which to build.....	31
d. Practical challenges	32
e. Futures Plan intent and priority action areas	33
f. The Futures Plan – Action Plan.....	34
g. Regional Pathfinder Actions	35
h. Priority Area Pathfinder Actions	37
i. Other Priority Area Actions.....	38
5. Implementing the Futures Plan	39
a. A New Approach to Regional Collaboration	39
c. Futures Plan evaluation and reporting	46
d. Futures Plan Regional Economy Dashboard.....	48
e. Regional economic development tools and resources.....	48
f. CCA Futures Plan Interim Implementation Plan.....	48
6. Attachments	50
Attachment A -	52
Key Stakeholder Groups.....	52
Attachment B -	53
Related Plans and Strategies Register	53
Attachment C -	58
List of Futures Plan Participants / Contributors.....	58



The Cradle Coast Regional Futures Plan

Executive Summary

The Cradle Coast region is developing a growing, diverse economy - with successfully transitioning foundation industries, such as manufacturing and food processing, agriculture and forestry and emerging opportunities in aquaculture, niche food production, renewable energy, tourism and health care and social assistance. The region is going through a period of economic growth and the related fundamentals for the region are strong. Current projections suggest a potential net increase in jobs through to 2022, over and above current trends.

Market changes and technology are bringing new specialised opportunities that complement the region's existing globally competitive strengths, including:

- [Advanced manufacturing](#) – e.g. specialisations in defence industry manufacturing
- [Agribusiness](#) - The region has a strong specialisation in production, processing and services, and the advantage of climatic conditions. There is potential for supporting growth in niche products, greater value-adding and expanding market access
- [Aquaculture](#) – Whilst there is debate around regulation, sustainability and environmental impact, it remains on a solid growth trajectory
- [Forestry](#) – There is substantial investment in establishing new operations. Plantation forests, innovative farming models and advanced harvesting and milling technologies provide a more sustainable and sophisticated future
- [Renewable energy](#) – Tasmania sees the potential of being the 'Battery of the Nation' in Australia's national energy market. The Cradle Coast has a significant role to play
- [Service sector](#) – This is already large and is projected to grow significantly faster than other sectors, particularly in tourism and health care and social assistance

The region's economic prosperity is dependent on the specialisations and competitiveness within and across these key sectors and needs to be underpinned by a workforce that is equipped to support such growth. However, there are several embedded structural challenges that need to be overcome to ensure the workforce is well-placed to provide the skills and capabilities to take on the jobs that are coming, especially in full-time higher skilled occupations. These challenges include:

- [High unemployment rates](#) - Including youth unemployment and longer term unemployed (higher in most of our Council areas than the Tasmania average)
- [Low educational attainment levels](#) - There is a need to improve education outcomes including life skills. Many employers have trouble recruiting suitable workers. Most new jobs require post school qualifications
- [Shrinking working-age population](#) - Due to a combination of older and aging workforce, static population growth and out-migration
- [Retaining population](#) - The region has an ageing population and retaining youth in the region, particularly for the workforce is a challenge
- [Regionally dispersed population](#) - Isolation of some communities such as King Island, far North West and the West Coast presents challenges for economic and services development. The hotspot for population growth is at the eastern end of the region

- Significant labour demands - A significant number of new, skilled jobs will be added to the economy. This coincides with an aging / shrinking workforce, therefore filling these jobs / skills gaps will be a challenge

The identified key challenges are familiar yet proving difficult to address. Responding to the challenges spans many sectors, organisations and responsibilities. It requires a more collaborative effort to ensure organisations that exist to serve and support our region's enterprises and communities, that are often in competition with each other, now have a new and better way of working together on the complex challenges that are not effectively being dealt with separately.

The Cradle Coast Regional Futures Plan (Futures Plan) has been created in response to these challenges. It establishes a shared narrative to guide collective regional and local action, aimed at improving living standards in the region by boosting regional growth and fostering a more resilient economy, with a sharp focus on creating more jobs and better jobs.

Analysis of economic data demonstrates the importance of a diverse range of sectors underpinning the region's economy, including mining, construction and retail services. However, a priority for the Futures Plan is to focus, at least initially, on the high value growth sectors that also have the greatest existing or emerging jobs growth opportunities, including:

- Advanced manufacturing
- Agribusiness
- Forestry
- Renewable energy
- Health care and social assistance
- Tourism

The planning process has identified several priority areas and a suite of co-designed actions that span the region's key economic growth sectors.

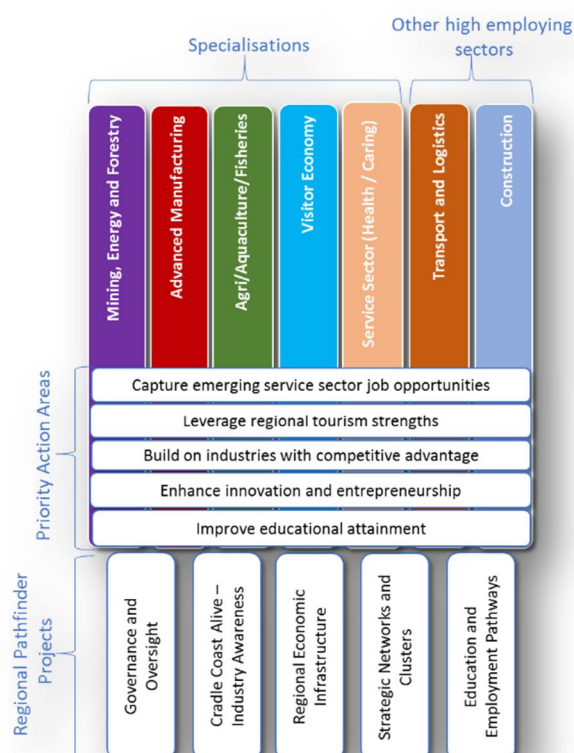


Figure i – Futures Plan's key place based, cross-cutting priority focus areas to support more jobs and better jobs

Rather than being a place made up of a multitude of dispersed, small communities, the region can be better described as a diverse, strong, regional hub and spoke economy – with the greater Burnie and Devonport (twin city effect) supporting three smaller, interconnected, strategically important, geographically distributed economies. Understanding the drivers of each of the region's economic zones (i.e. assets / strengths, industry composition, size and proximity), will help shape local responses to the identified regional challenges.

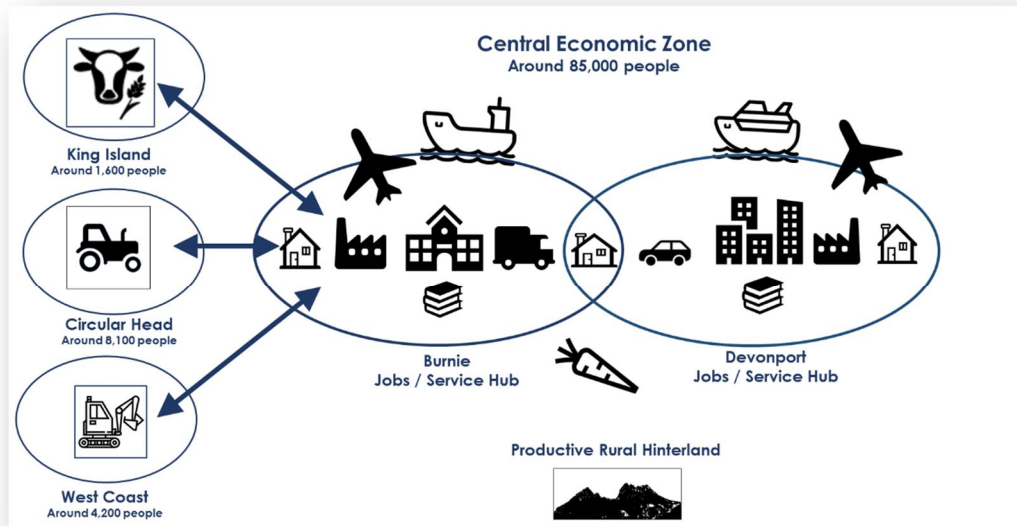


Figure ii – Foundations of the Cradle Coast economy

A new, innovative regional system of governance has been developed to support the implementation of the Futures Plan that is about regional stewardship, connection, coordination and cooperation and provides an effective platform for working together.

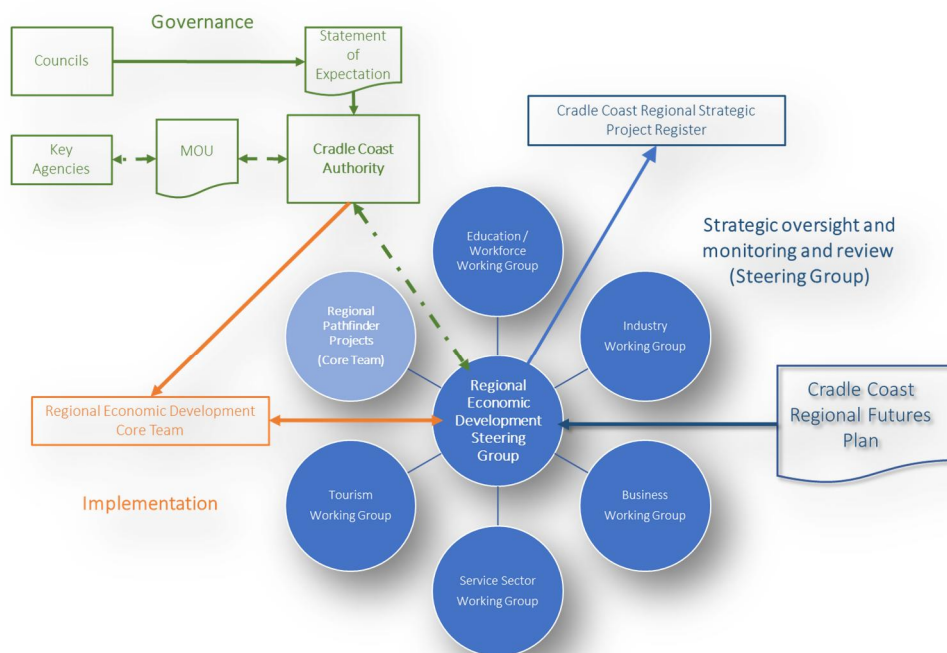


Figure iii– Regional Futures Plan Governance Arrangements

Key features of the new arrangements include:

- CCA acting as the legal entity to provide the oversight for the implementation of the Futures Plan and provide the executive / administrative support for the new governance arrangements
- A Memorandum of Understanding between the key agencies involved will be negotiated to demonstrate commitment and agree on resourcing, processes, roles and timeframes.
- A Regional Economic Development Steering Group to be established to provide the overall systems leadership and guide the implementation and review of the Futures Plan
- Regional Economic Development Core Team to be established to support The Steering Group and provide overall systems management and administration support
- Working Groups to be established for each of the Futures Plan priority areas to align efforts, identify opportunities for collaboration and reducing duplication, establish, oversee and support specific project teams and advise the Steering Group on matters relating to each priority area
- Providing a more consistent and systemic approach to prioritising strategic regional investment opportunities (including infrastructure projects)

Rather than an expansive, detailed plan with little chance of being implemented, the focus of the Futures Plan is more about planning and doing. It involves decision making, collaboration and activating resources across organisations and networks, with an emphasis on starting first with what matters most. It also involves developing and implementing initial pathfinder projects to help embed new systems and processes, and develop relationships, trust and confidence from some early wins.

Implementation of the Futures Plan will be a collaborative effort, with diverse actors and initiatives contributing to the shared strategic agenda.

The agenda is subject to a range of complex, external economic, social and environmental circumstances. So, the Futures Plan is based on the principles of *action learning*, meaning that the implementation and evaluation are integrated and occur at the same time to provide targeted and rapid feedback about what is and is not working and support the process of continuous improvement.

Negotiating and putting in place the new governance arrangements will take some time and yet there is a demonstrated need for action that will be crucial to gaining momentum. An interim implementation plan has been developed to support moving into the next phase, including establishing the governance arrangements while supporting the progress of initial projects.

The Futures Plan at a glance:

Purpose				
Boosting regional growth and fostering a more resilient economy to lift the living standards of all residents in the region				
This will be achieved through a shared agenda and collective leadership to identify actionable investment priorities with the highest potential return to the community – with a focus on more jobs and better jobs.				
Strategic Intent		Building on our regional strengths		
Improving educational attainment		Economic fundamentals	Connectivity	
Enhancing innovation and entrepreneurship		Traditional Industries	Natural / built assets	
Building on industries with a competitive advantage for economic growth		Agricultural output	Services sector	
Leverage regional strengths to develop the tourism industry		New growth sectors	Educational assets	
Capture employment opportunities from emerging services sector		Innovation		
Developing the related leadership / oversight				
Regional Pathfinder Projects				
Regional Education and Employment Pathways Plan		Support strategically significant networks and clusters	Cradle Coast Alive - Industry and Employment Awareness Program	
Regional Economic Infrastructure Group		Governance – Regional economic development		
Priority Area Pathfinder Projects				
Education / Workforce	Industry	Business	Services Sector	Tourism
Promote Schools-based Apprenticeships	Manufacturing centre of excellence	Network of business associations	Health professional recruitment and retention	Cradle to Coast Tasting Trail
Improve school industry connections	Battery of the nation taskforce	Network of innovation hubs	Caring services cluster	New tourism experiences
				Develop regional food tourism cluster
				Regional destination management plan
Other Priority Area Actions				
Education / Workforce	Industry	Business	Services Sector	Tourism
UTas’ Children’s University	Support Tas Hort Export Group	Youth entrepreneurship activities	Retain aged workers in caring services sector	Tourism operator training experiences
Leverage UTAS’ West Park development	Support regional fermentation			New product development / start-ups
Extend the Burnie Works project	Harmonise regulations / permits			Develop eco-adventure tourism cluster
Retain aged workers in key sectors				
Short courses for management training				
Ensure VET grades count towards ATAR				
Key Outcomes – Increased:				
Economic leadership / advocacy	Economic driven population growth	Vocational and tertiary education attainment	Business start-ups / scale-ups	
Businesses employing workers	Workforce participation / Size of workforce	Full time (equivalent) jobs	Skilled jobs	
Worker productivity	Regional GDP	Regional Value Add	Weekly household incomes	

Figure iv – The Cradle Coast Regional Futures Plan overview

The Cradle Coast Regional Futures Plan

1. Introduction

Tasmania's Cradle Coast comprises places, communities and industries linked by strong geographical, social, cultural and economic relationships and mutual interdependence.



Figure 1 - The Cradle Coast Region and its 9 local government areas

The region is developing a growing, diverse economy with successfully transitioning foundation industries, such as manufacturing and agri-food processing, agriculture and forestry and emerging opportunities in aquaculture, niche food production, renewable energy, tourism and health care and social assistance.

The region's economic prosperity is dependent on the specialisations and competitiveness within and across these key sectors and needs to be underpinned by a workforce equipped with the skills to support such growth. The region is enjoying a period of economic growth, but it remains constrained by a range of entrenched economic and social challenges, including:

- Retaining population

- Regionally dispersed population
- Low educational attainment levels
- High unemployment rates
- Shrinking working-age population
- Significant labour demands

The Cradle Coast Regional Futures Plan (Futures Plan) has been created in response to these challenges. The project brought together the knowledge and experience some of the region's leaders and key stakeholders, to build on current strategies and regional strengths, to identify shared priorities for growth and what we need to do better together to achieve that growth.

It establishes a shared narrative to guide collective regional and local action, aimed at improving living standards in the region by boosting regional growth and fostering a more resilient economy, with a sharp focus on creating more jobs and better jobs.

With the support of the Regional Australia Institute (RAI)¹, the first phase of the project established the evidence base, investment and economic development priorities for the region and a suite of potential growth options. Phase two focused on developing and prioritising related locally owned actions with the highest potential return to the community and establishing the associated leadership and oversight for their implementation.

The identified key challenges are familiar yet proving difficult to address. Responding to the challenges spans many sectors, organisations and responsibilities. A more collaborative effort is required, including systemic / coordinated government support, to ensure organisations that exist to serve and support our region's enterprises and communities, that are often in competition with each other, have a new and better way of working together.

A new regional system of governance has been developed to support the implementation of the Futures Plan that is about regional stewardship, connection, coordination and cooperation. The new arrangements will provide direct input into the Tasmanian and Australian Governments' decision making and a lean and agile platform for working together on the complex challenges that are not effectively being dealt with separately.

Working regionally is difficult, so the arrangements are informal / relational, lean and easy to implement, to help build regional trust and cooperation. We can help accelerate this process by action learning. Developing and implementing initial *pathfinder* projects will help embed new systems and processes and develop confidence from achieving early wins.

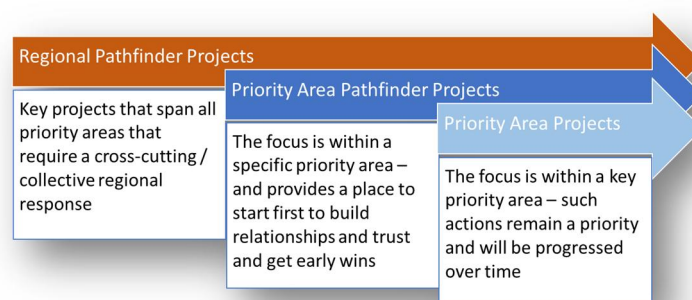


Figure 2 – Working regionally - Starting first with what matters most

The planning process has identified several priority areas and a suite of co-designed actions that span the region's economic growth sectors.

¹ The Regional Pathfinder approach See: <http://www.regionalaustralia.org.au/home/our-products-tools/pathfinder-initiative/>

Our economy is built, and its competitiveness is dependent on strategically significant, overlapping business, community and government networks. Effective networks enable information, knowledge and other assets to flow quickly across organisational, sectoral, political, or spatial boundaries. A key requirement for the implementation of the Futures Plan is to identify, support and harness the power of the region's related economically significant networks to align effort to better deal with complex challenges or respond to new opportunities.

2. Understanding the socio-economic context

The Cradle Coast region is complex and made up of places and communities linked by strong geographical, social, cultural and economic relationships and mutual interdependence. It exists within an increasingly complex world, with rapid change and disruption directly reshaping our economy and way of life.

The region covers 22,500 km² (33% of the total area of Tasmania), with extensive natural and wilderness areas and waterways and productive rural land and seascapes. From a settlement perspective, the region consists of several, interdependent, coastal urban and dispersed rural population centres. It has a population of around 111,300 people.²

The Cradle Coast Economy at a Glance
Gross Regional Product - \$6.30 billion
Value added – \$5.426 billion
Local businesses – 7,829
Industry with most businesses – Agriculture, forestry and fishing
Employing businesses – 3,195 (41% of all businesses)
Employing businesses – 1 to 4 employees – 1,995 (62% of employing businesses)
Employing businesses – 200+ – 6 (3 in manufacturing and 3 in agriculture)
Local Jobs – 49,487 (Full time equivalents – 40,373; Participation rate 53.6%; (52% full time / 39% part time)
Average worker productivity - \$109,642 (Tasmania wide - \$102,718)
Largest industry by employment – Health care and social assistance
Unemployment – 7.7% (Youth unemployment – 12.8%)
Largest industry by value add - Mining
Largest industry by output – Manufacturing
Largest industry by exports – Manufacturing
Largest industry by local sales – Construction
Industry highest worker productivity - Mining
Qualifications – 40.9% no qualifications; 14.6% Bachelor or higher; 41.2 Cert to advanced diploma

Figure 3 - Snapshot of the Region's economy

² Economic data sourced from - <https://economy.id.com.au/cradle-coast>

a. The region's integrated, geographically distributed local economies

Around 75% of the region's population is concentrated in the towns and cities along the urban coastal strip between Latrobe and Wynyard. It forms the region's central economic zone and is the main provider of economic output and jobs. It includes the twin cities of Burnie and Devonport as the region's two main service / industry / employment centres. It is the main provider of goods and services to residents across the region, just as Launceston is for the Northern region. While communities and local economies of Circular Head, West Coast and King Island are relatively contained, and benefit less from direct inter-connectedness, they do benefit from the economies of scale and level of services derived from being part of the strategic Murchison group of councils with Burnie as its major service centre.

High degrees of connectivity provide the ability for people to live in one area and work in another within the central economic zone, however there is a distinct concentration of workflows around Devonport and Burnie:

- Devonport / Spreyton / Latrobe - generates around 13,000 jobs
- Burnie / Somerset / Wivenhoe - generates around 11,000 jobs
- Smaller economic nodes include: Ulverstone – 4,000 jobs; Smithton – 2,300 jobs; Wynyard – 1,900 jobs



Figure 4 - Mapping jobs by destination to identify key economic zones³

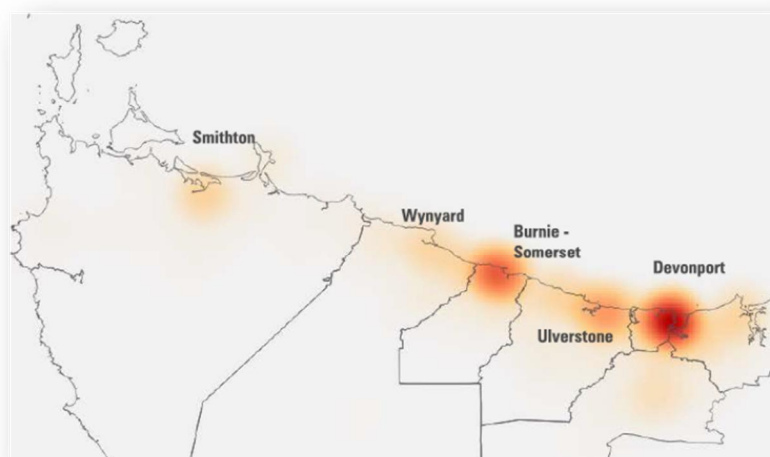


Figure 5 – Mapping business numbers from the Australian Business Register

³ Figures 4 – 6 provided by Id (Cradle Coast Journey to Work and Labour Force Analysis)

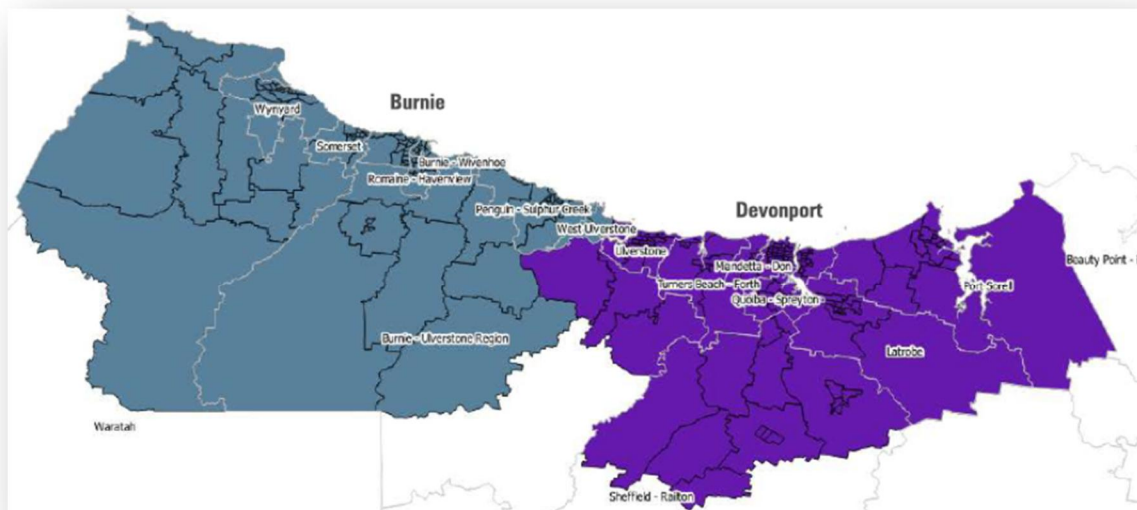


Figure 6 – Greater Burnie and Devonport labour markets

Mapping journey to work and business data⁴ reinforces the twin city effect of the two functional industry hubs / labour markets – greater Burnie that draws workers mainly from Wynyard, Burnie, Penguin and Sulphur Creek and greater Devonport that draws workers mainly from Ulverstone, Devonport Latrobe, Port Sorell and Sheffield.⁵ 41% of Waratah Wynyard residents travel to Burnie and 44% of Latrobe residents travel for employment to Devonport⁶, reinforcing the porous nature of municipal boundaries.⁷

The strategically important local economies / labour markets of Circular Head, King Island and West Coast are relatively contained – meaning that almost all workers live and work in the same local government area.

The heartland economies of Circular Head, King Island and West Coast are not as close, connected to or influenced by the central economic zone. The smaller population and susceptibility to industry trends, limits their capacity to shape their own future and therefore needs to be supported.

Rather than being a region made up of a multitude of dispersed, small places, it could be better described as a diverse, strong, regional hub and spoke economy with the twin city economic zone supporting three smaller, interconnected, strategically important, geographically distributed economies.⁸

Understanding the drivers of each of the region's economic zones – i.e. assets / strengths; industry composition, size and proximity etc, can help shape local responses to the identified regional challenges.

For instance, the flow of goods and services and strong regional workflows underline the connectivity within the central economic zone. Populations of 50,000 people or more provide a critical mass for a level of economic diversity that supports resilience and the capacity to

⁴ See figure 6.

⁵ While the Kentish local government area is not part of the coastal strip, it does for part of the Devonport labour market.

⁶ Source – 'Making Sense of the Census - A snapshot of the Cradle Coast Region'; Amina Keygan; Jan 2018.

⁷ Click to link for interactive map showing movements - <http://dev-regionalaustralia.org.au/rb/SA2/>.

⁸ See Figure 7.

generate growth from within the region.⁹ No single council in the region has a population of 50,000. However, the combined populations of the councils within this zone is around 85,000, which is comparable with Launceston (86,000), Rockhampton - 79,000 (QLD) and Bunbury - 74,000 (WA).¹⁰

Traditional approaches to development tend to focus on industry sectors or the local council area scale. A more coordinated approach to settlement and economic planning at these more functional scales provides the opportunity to build resilience and achieve goals that would not be possible by focusing on economic activity at the single local council scale.

A key challenge for the region will be in gaining an understanding of how the hub and spoke model of the twin city Burnie – Devonport industrial and service hubs and surrounding heartland economies can most effectively work together to leverage economic growth and investment.

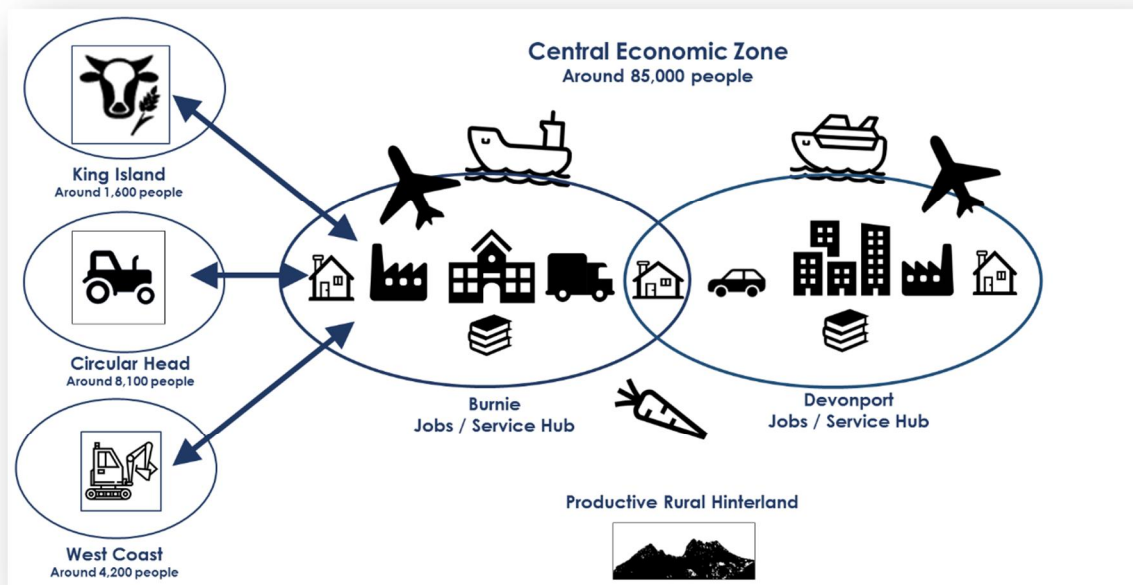


Figure 7 – The foundations of the Cradle Coast economy

b. The demographic structure of the region¹¹

The region's population peaked in 2011 and has declined by around 2,500 people since. As well as the declining population, there are several structural population issues that influence economic growth and growing / skilling the region's workforce:

- The region's population is estimated to increase to around 118,840 residents by 2022
- Around 75% of the population is in the urban strip between Latrobe and Wynyard. The balance of the population is geographically dispersed
- The median age is 44 years, meaning that the region has an aging population and despite the expected increase in population, the aging trend is forecast to continue
- Workforce entry and exit ratios pose challenges in resourcing the workforce and the increasing need for aged care services

⁹ See footnote 1.

¹⁰ Source - <https://blog.id.com.au/2018/population/population-trends/the-50-largest-cities-and-towns-in-australia-by-population-2018-update/>

¹¹ See Footnote 7.

- The aging workforce also has implications for key sectors – e.g. More than 40% of workers in several industries are over 50 years of age
- There is a net outward migration in the 15 – 24-year age group
- The size of the labour market and participation rates have declined by around 1,230 people since 2011. Part-time employment is increasing. A challenge will be to ensure that the size and skill levels of the region's workforce can meet the needs of the growing economy
- Only 27% of residents have completed year 12. Around 25% have vocational training; 7% have diploma / advanced diploma qualifications and less than 10% have a bachelor's degree or higher – it should be noted that the trend is improving

The Cradle Coast Demographics at a Glance	
Population -	111,259
Female – Male –	51.2% - 48.8%
Median Age -	44
Babies / Schoolers age –	20.4%
Tertiary education / young workforce age (18 to 34) –	17.7%
Home builders / Older workers (35 – 59) –	32.8%
60+ age -	27.8%
Aboriginal and Torres Strait Islander population –	7.2%
Australian Citizens –	90.8 %
Born overseas –	9%
Language at home other than English –	2%
Workforce Participation Rate –	54%
Unemployment – 7.7% (Youth unemployment –	12.8%)
Median household income -	\$990 pw
Journey to work (Work in a different LGA to where they live) –	32.9%
Public Transport to work –	1%
Relative disadvantage (SEIFA Index) -	928

Figure 8 - Snapshot of the Region's Demography¹²

These related issues impact our local communities in different ways, which reinforces the importance of local input into central government decision making and that while planning regionally is important for developing economies of scope and scale to address such issues, related action needs to be co-designed and implemented locally.

¹² Follow link for more details - <https://profile.id.com.au/cradle-coast>

c. The drivers of regional economic growth

Mapping jobs by industry shows the major specialisations across the region.¹³ Most rural areas are dominated by agriculture, mining and accommodation / food services. Urban areas are dominated by health, education and retail services and manufacturing and transport and logistics in the case of the Burnie and Devonport industry hubs.



Figure 9 – Main job specialisations by industry across the region¹⁴

Market changes and technology are bringing new specialised opportunities that complement the region's globally competitive strengths, including:

- [Advanced manufacturing](#) – e.g. specialisations in defence industry manufacturing
- [Agribusiness](#) - The region has a strong specialisation in production, processing and services, and the advantage of climatic conditions. There is potential for supporting growth in niche products, greater value-adding and expanding market access
- [Aquaculture](#) – Whilst there is debate around regulation, sustainability and environmental impact, it remains on a solid growth trajectory
- [Forestry](#) – There is substantial investment in establishing new operations. Plantation forests, innovative farming models and advanced harvesting and milling technologies provide a more sustainable and sophisticated future
- [Renewable energy](#) – Tasmania sees the potential of being the 'Battery of the Nation' in Australia's national energy market. The Cradle Coast has a significant role to play
- [Service sector](#) – This is already large and is projected to grow significantly faster than other sectors, particularly in tourism and health care and social assistance

¹³ See figure 9.

¹⁴ Industry with the largest share of jobs in the destination zone.

The following tables identify the region's top performing key sectors against each of the key drivers of regional economic and jobs growth¹⁵:

Total exports by industry sector							
Cradle Coast Region	2016/17			2011/12			Change
Industry	\$m	%	Tasmania%	\$m	%	Tasmania%	2011/12 to 2016/17
Manufacturing	1,067.9	27.9	19.8	1,493.8	34.6	22.8	-425.9
Mining	802.4	21.0	6.2	940.6	21.8	7.3	-138.1
Agriculture, Forestry and Fishing	487.7	12.8	10.1	508.2	11.8	9.8	-20.5
Transport, Postal and Warehousing	411.3	10.8	6.0	392.3	9.1	5.4	+19.0
Health Care and Social Assistance	366.3	9.6	14.9	290.9	6.7	12.2	+75.5

Output by industry sector							
Cradle Coast Region -	2016/17			2011/12			Change
Industry	\$m	%	Tasmania%	\$m	%	Tasmania%	2011/12 to 2016/17
Manufacturing	1,667.2	15.9	12.1	2,280.0	20.8	15.3	-612.8
Mining	1,475.6	14.1	4.4	1,808.5	16.5	5.2	-332.9
Construction	1,225.8	11.7	11.7	1,042.1	9.5	10.5	+183.7
Agriculture, Forestry and Fishing	1,068.4	10.2	7.0	1,053.2	9.6	6.7	+15.2
Health Care and Social Assistance	902.7	8.6	10.8	740.4	6.8	8.9	+162.2

Value added by industry sector							
Cradle Coast Region	2016/17			2011/12			Change
Industry	\$m	%	Tasmania%	\$m	%	Tasmania%	2011/12 to 2016/17
Mining	821.6	15.1	4.8	973.4	17.8	5.5	-151.8
Agriculture, Forestry and Fishing	818.4	15.1	10.1	748.1	13.7	9.5	+70.4
Health Care and Social Assistance	641.7	11.8	14.6	520.5	9.5	12.6	+121.3
Manufacturing	538.1	9.9	7.0	725.6	13.3	9.1	-187.5
Construction	348.1	6.4	6.3	292.0	5.4	5.8	+56.1

Local sales by industry sector							
Cradle Coast Region	2016/17			2011/12			Change
Industry	\$m	%	Tasmania%	\$m	%	Tasmania%	2011/12 to 2016/17
Construction	1,225.8	18.3	19.5	1,042.1	15.7	17.6	+183.7
Mining	673.1	10.0	3.1	867.9	13.1	3.7	-194.7
Manufacturing	610.0	9.1	7.4	786.2	11.8	10.4	-176.2
Agriculture, Forestry and Fishing	607.7	9.1	5.2	569.2	8.6	4.8	+38.5
Health Care and Social Assistance	536.3	8.0	7.9	449.6	6.8	6.6	+86.7

¹⁵ Source: Cradle Coast Regional Economic Profile - <https://economy.id.com.au/cradle-coast>

Full-time equivalent employment by industry sector							
Cradle Coast Region		2016/17			2011/12		
Industry	Number	%	Tasmania%	Number	%	Tasmania%	Change 2011/12 to 2016/17
Manufacturing	4,933	12.2	8.6	5,408	12.9	9.2	-475
Health Care and Social Assistance	4,559	11.3	13.2	4,074	9.7	11.7	+485
Agriculture, Forestry and Fishing	3,896	9.6	6.4	3,987	9.5	6.5	-91
Retail Trade	3,656	9.1	9.6	3,989	9.5	9.8	-333
Construction	3,639	9.0	9.1	3,524	8.4	8.8	+115

Registered businesses by industry							
Cradle Coast Region - Total registered businesses		2017			2015		
Industry	Number	%	Tasmania %	Number	%	Tasmania %	Change 2015 to 2017
Agriculture, Forestry and Fishing	1,894	24.2	14.9	1,852	24.2	15.6	+42
Construction	1,047	13.4	15.2	1,007	13.2	15.0	+40
Rental, Hiring and Real Estate Services	718	9.2	10.0	684	8.9	10.2	+34
Retail Trade	569	7.3	7.1	622	8.1	7.5	-53
Financial and Insurance Services	525	6.7	7.1	463	6.1	6.9	+62

Registered Employing businesses by industry							
Cradle Coast Region - Registered employing businesses		2017			2015		
Industry	Number	%	Tasmania %	Number	%	Tasmania %	Change 2015 to 2017
Agriculture, Forestry and Fishing	608	19.0	12.6	582	18.4	13.2	+26
Construction	418	13.1	14.6	419	13.2	14.0	-1
Retail Trade	386	12.1	11.1	409	12.9	11.6	-23
Accommodation and Food Services	293	9.2	9.8	289	9.1	9.5	+4
Professional, Scientific and Technical Services	238	7.4	10.1	250	7.9	9.6	-12

Figure 10 – 16 – The drivers of regional economic growth

The data demonstrates the importance of a diverse range of sectors underpinning the region's economy, including mining, construction and retail services etc. However, a priority for the Futures Plan is to focus, at least, initially on the high value growth sectors that also have the greatest existing or emerging jobs growth opportunities, including:

- Advanced manufacturing
- Agribusiness
- Forestry
- Renewable energy
- Health care and social assistance
- Tourism

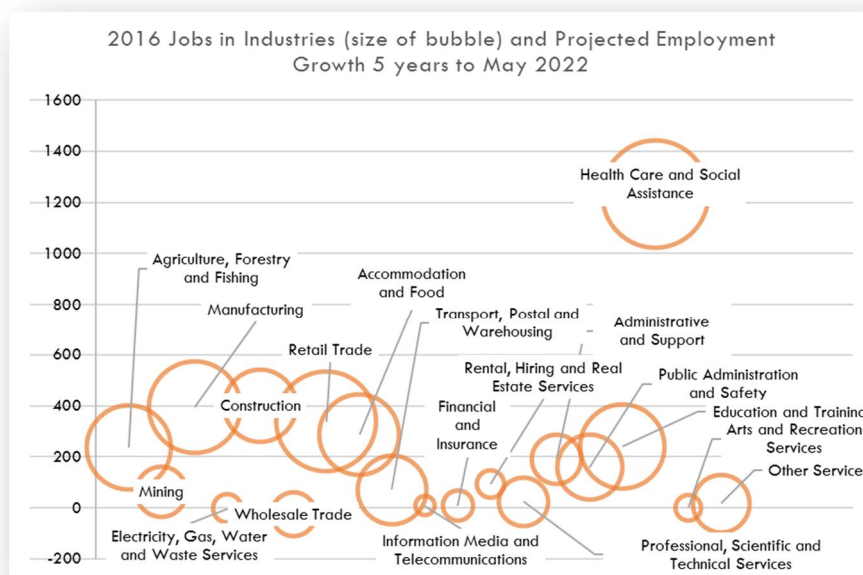


Figure 17 - Industry employment growth projections for Cradle Coast to 2022¹⁶

d. Cluster development as a core strategy to drive regional economic growth¹⁷

The region's economy is dependent on leveraging our strengths to grow high value specialisations that are most competitive in the global market place. An effective local economy, with a strong service sector is also needed to directly support our key export industries and contribute to the liveability of the region.

Economic activity in the region is driven through overlapping networks and relationships. Identifying and supporting strategically significant nodes or clusters of activity within these networks provides an effective means for development that builds on the region's economic strengths. Regions grow based on their ability to provide environments where enterprises want to cluster.

The Futures Plan is using a cluster-based development approach to capture the economic advantages that accrue from enterprises clustering together and harnessing the power of these hotspots of activity to build on our strengths and specialisations, and where collective action is required to better deal with complex challenges.

A cluster-based approach is a targeted and clearly focused way of investing limited resources into the growth opportunities that will provide maximum benefit to the economy and community.

Clusters:

- Are naturally occurring and need to be nurtured from the ground up. Enterprises in clusters gain competitive advantage and economies of scope and scale through local proximity and interdependence

¹⁶ Source – See footnote 1.

¹⁷ For more information on Cluster development - See Chapter 3 – 'Global Trends and Regional Links: Jobs, Clusters and global value chains' in Productivity and Jobs in a Globalised World; OECD 2018 - <https://www.oecd-ilibrary.org/docserver/9789264293137-en.pdf?expires=1541039484&id=id&accname=guest&checksum=CA44FEE9832580D0766732F81519A47E>; 'Taking Clusters to the Next Level' - <https://www.slideshare.net/edpro/networks-clusters-and-ecosystems-taking-regions-to-the-next-level-with-open-innovation>; Rethinking Cluster Initiatives - https://www.brookings.edu/wp-content/uploads/2018/07/201807_Brookings-Metro_Rethinking-Clusters-Initiatives_Full-report-final.pdf; Ifor Ffowcs-Williams, Cluster Development Handbook, Cluster Navigators

- Provide concentrations of regional growth assets such as industry specialisations, shared infrastructure and IP and skilled labour markets
- Help breakdown organisational and political silos and improve timely information and knowledge transfer
- Provide networked environments that are more conducive to innovation and entrepreneurship than siloed environments
- Help identify and harness hidden / underutilised assets
- Build resilience – while enterprises can come and go, well developed and focused networks continue to evolve

Clusters are not:

- Built by government intervention
- A quick fix solution or a solution to every economic challenge
- About wishful thinking by developing / promoting clusters for their own sake or with no realistic basis for them thriving in the region

The Futures Plan provides clear and detailed knowledge about the characteristics of the region. It identifies the region's greatest strengths / growth sectors and which specialisations within those sectors provide the greatest investable growth opportunities. An objective of the Futures Plan involves supporting the key clusters of enterprises to work together to develop the specialisations that are most beneficial to the region's economy. Considerations in this approach include:

- Clusters evolve organically and should be industry led. However, governments have a role to play in improving platforms that can accelerate the growth of strategically important clusters
- Related investment decision making is about balancing improved economic growth (specialisation) and minimising the risk of susceptibility to economic shocks (diversification)
- Breaking down traditional hierarchal / siloed mindsets in favour of a culture of collaboration will require development of new habits and processes. The focus needs to be on capacity / capability building to make it as easy as possible for enterprises and related agencies to work together
- Clusters need time to develop from within. This means helping to develop / build the capability of cluster core teams / managers
- Improving communication and engagement between cluster leaders and support service providers to improve efficiency and reduce clutter
- Engagement between cluster and support agency leaders to work together on common challenges such as developing a workforce equipped with the skills to support related economic growth

A cluster framework may not be the most effective approach to every aspect of regional development. Other strategies / actions have been identified that support the shared needs of enterprises such as supporting new product development, training and skills development.

3. Barriers to growth and more jobs, better jobs¹⁸

The region is currently going through a period of economic growth and prosperity and the economic fundamentals for the region are strong. Current projections suggest a potential net increase in jobs through to 2022, over and above current trends.

¹⁸ Data provided with thanks to Ivan Neville (Labour Market Research and Analysis Department of Jobs and Small Business) and Kim Houghton – see Footnote 1.

There are some deeply embedded systemic, structural challenges that need to be overcome to ensure the workforce is well-placed to provide the skills and capabilities to take on the jobs that are coming, especially in full-time higher skilled occupations, including:

- [High unemployment rates](#) - Including youth unemployment and longer term unemployed (higher in most of our Council areas than the Tasmania average)
- [Low educational attainment levels](#) - There is a need to improve education outcomes including life skills. Many employers have trouble recruiting suitable workers. Most new jobs require post school qualifications
- [Shrinking working-age population](#) - Due to a combination of older and aging workforce, static population growth and out-migration
- [Retaining population](#) - The region has an ageing population and retaining youth in the region, particularly for the workforce is a challenge
- [Regionally dispersed population](#) - Isolation of some communities such as King Island, far North West and the West Coast presents challenges for economic and services development. The hotspot for population growth is at the eastern end of the region
- [Significant labour demands](#) - A significant number of new, skilled jobs will be added to the economy. This coincides with an aging / shrinking workforce, and therefore filling these jobs / skills gaps will be a challenge

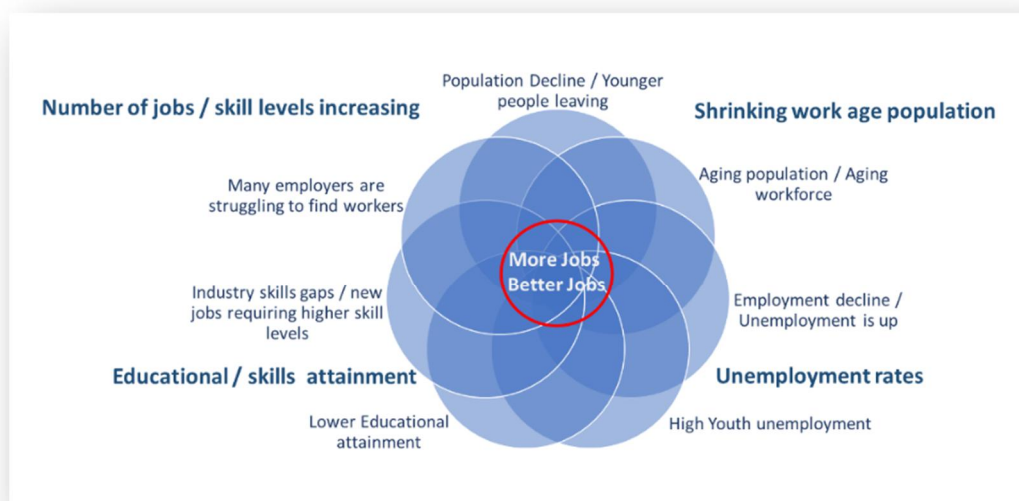


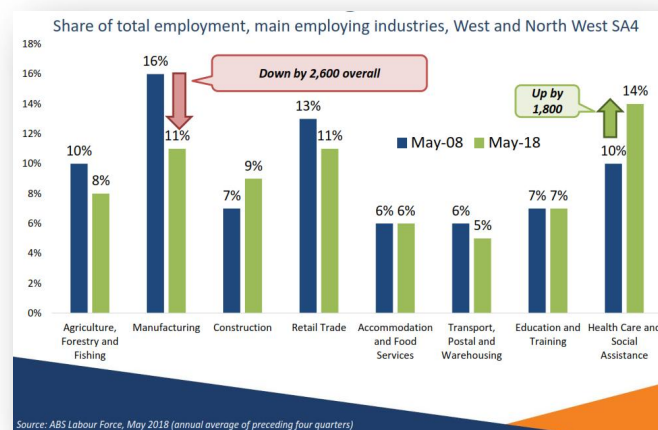
Figure 18 - Overlapping challenges to economic and jobs growth

a. The Evidence - More jobs and better jobs are coming, but....

Many jobs to be filled in the region		
Projected jobs growth: (D/JSB Employment Projections to 2022)	+	3,750
New NDIS jobs: (NDIS, Tasmanian Market Position Statement)	+	≈400
Estimated retirements: (Half of employed aged 55+)	+	5,700
Other turnover	+	≈3,000
Total		≈12,850

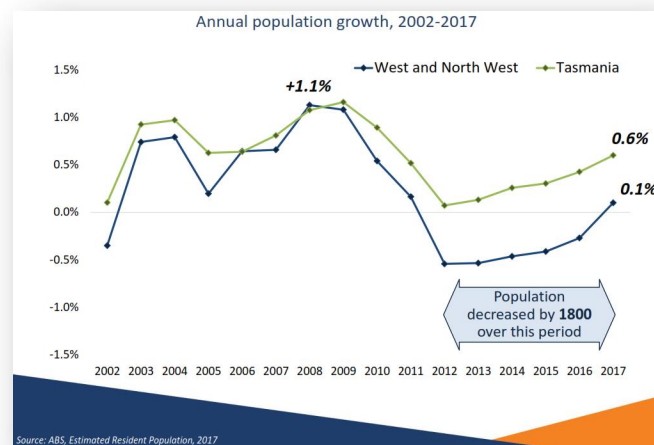
Source: Department of Jobs and Small Business, Employment projections to 2022; ABS Labour Force, May 2018 (12 month average of original data); NDIS Tasmanian Market Position Statement; ABS, Participation, Job Search, Mobility, 2017

As well as projected increase in jobs, the current workforce structure is changing:



Where will the workers come from?

Our population has declined in recent years:



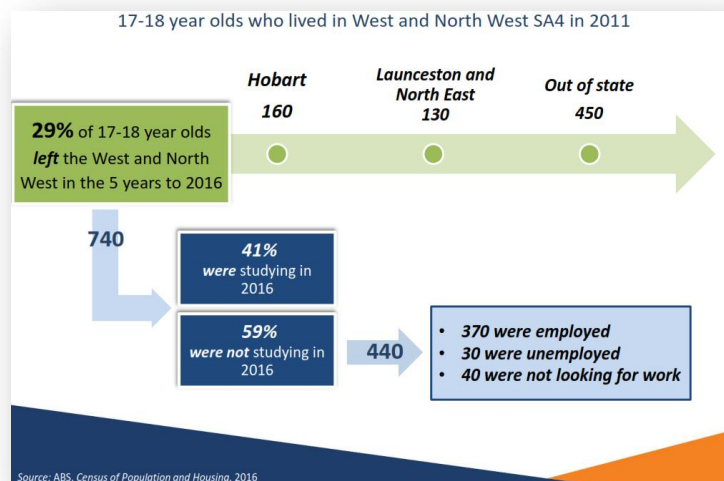
The demographics are changing across the region¹⁹:

% CHANGE OF KEY DEMOGRAPHIC GROUPS 2011-16			
	Population	Youth (0-15)	Senior (65 and above)
Burnie (C)	-2.2%	-10.4%	12.7%
Central Coast (M)	0.0%	-10.0%	20.2%
Circular Head (M)	-0.9%	-10.5%	22.2%
Devonport (C)	0.3%	-6.4%	15.2%
Kentish (M)	0.9%	-13.8%	35.2%
King Island (M)	1.5%	1.7%	23.1%
Latrobe (M)	8.8%	-1.7%	40.9%
Waratah/Wynyard (M)	-1.1%	-8.8%	20.8%
West Coast (M)	-11.7%	-20.8%	9.4%
Cradle Coast Region	-0.1%	-3.9%	22.4%
Tasmania	7.7%	-9.0%	20.4%

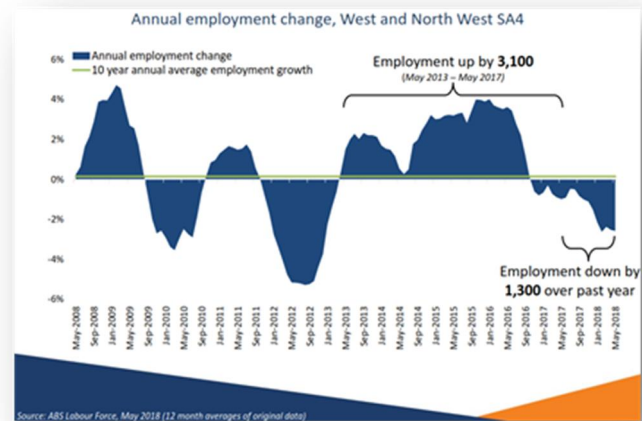
Source: ABS 2011 & 2016 Census of Population and Housing

¹⁹ See Footnote 1.

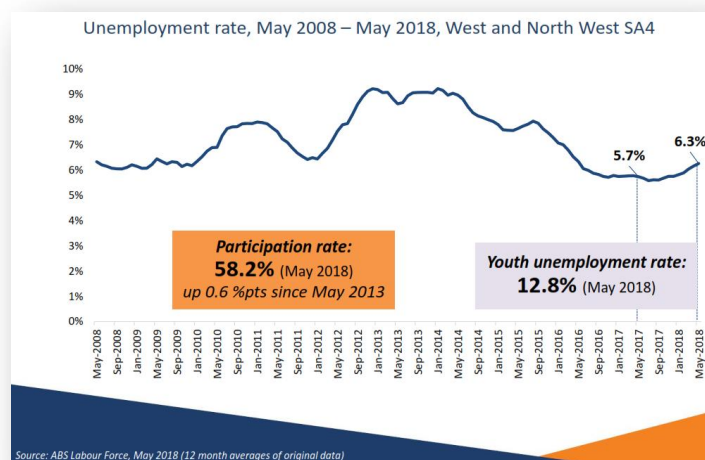
Younger people are leaving the region:



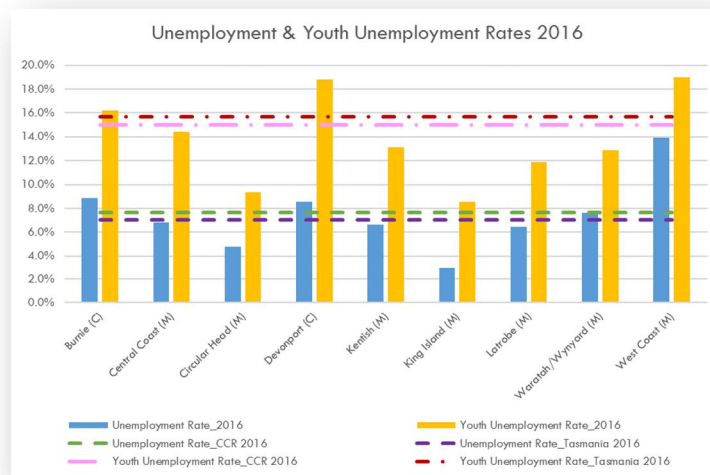
Employment is declining:



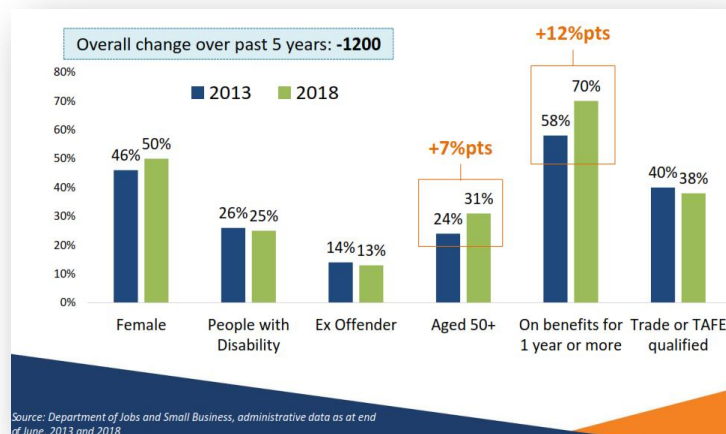
Unemployment is up:



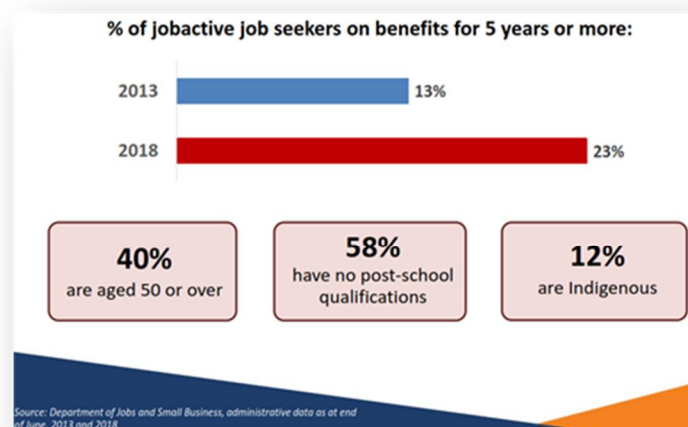
Unemployment varies across the region²⁰:



There are more, older long-term unemployed job seekers in the region:

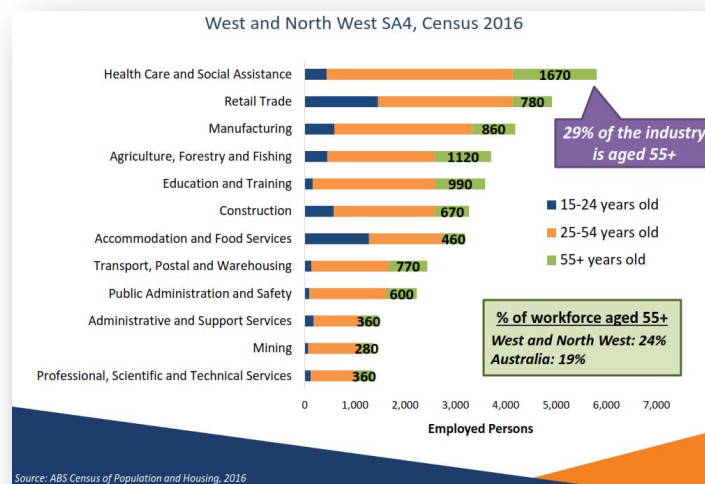


More job seekers are staying unemployed longer – for 5 years or more:

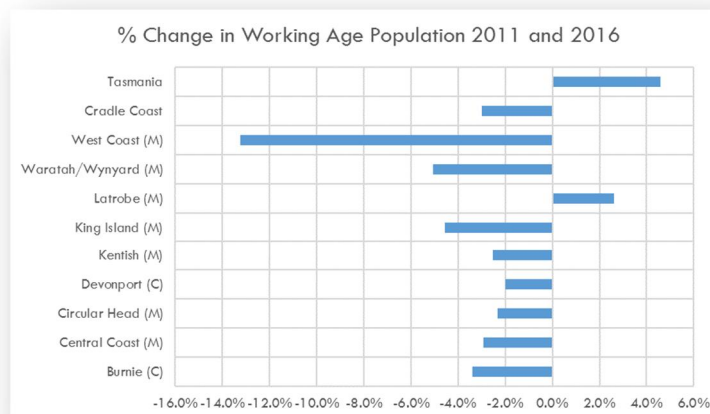


²⁰ See footnote 1.

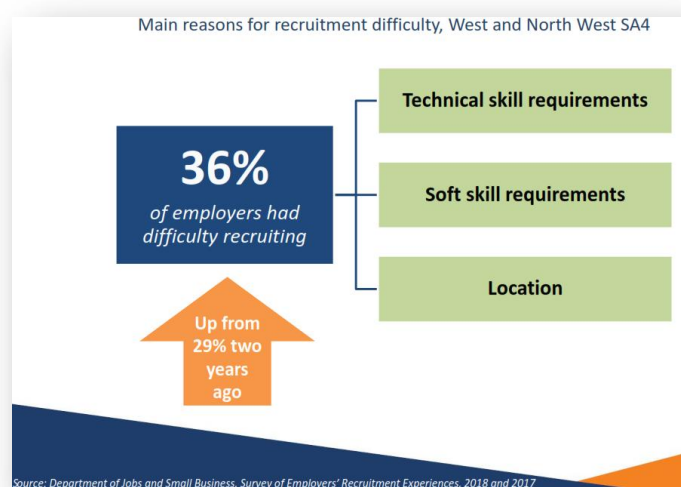
Our workforce by sector is aging:



Our workforce by locality is also aging²¹:

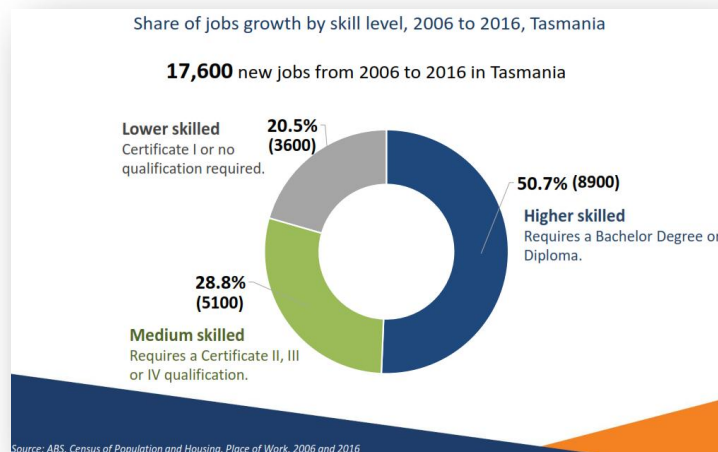


Many employers are struggling to find workers:

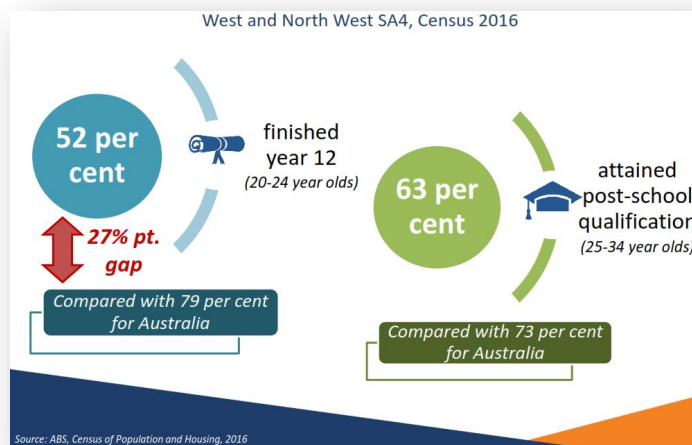


²¹ See footnote 1.

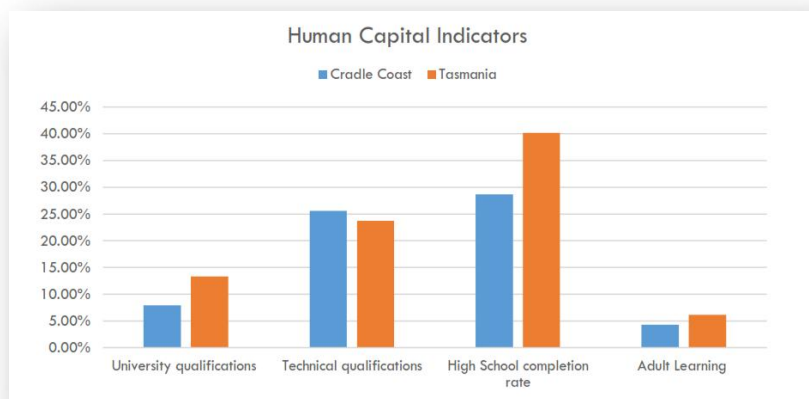
Most new jobs require post-school qualifications:



Education levels in the region are well below Australian average:

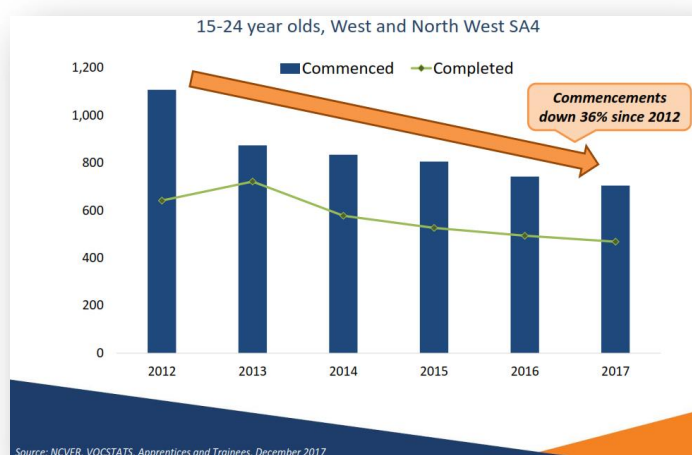


We need to develop our region's human capital²²:



²² See footnote 1.

Fewer apprenticeships and traineeships in recent years:



Figures 19 – 35 – The challenges to more jobs, better jobs

4. The Cradle Coast Regional Futures Plan (2019 – 2022)

a. Strategic agenda - Creating more jobs and better jobs for the Cradle Coast

Being ready and able to make the most of the rapidly changing global economy is dependent on the specialisations and competitiveness of our key export growth industries and related local service provision. Generating a resilient workforce equipped with the necessary skills is critical to supporting such growth.

This means turning around the interrelated downward trends impacting the region's labour markets. This includes:

- Stimulating more full-time employment across Cradle Coast with more skilled work and workers earning higher incomes
- Increasing educational attainment to assist in building the relevant skills base in the local population to secure these better jobs and the resultant increased incomes
- Addressing the liveability issues likely to influence decisions to stay, live and work in the region
- Strengthening the capacity for business to attract skilled workers from other locations as required

b. Context for the Futures Plan

While the Futures Plan is based on a long-term strategic agenda, it focuses on a relatively short-term approach to implementation and review. The fact that the key challenges identified in the planning process have been difficult to resolve over a long period, reinforces the need for focusing on identifying initial key *pathfinder* projects that will put the region on the right path to turning around these challenges.

The Futures Plan is more than a planning document. It is as much about a new, agile and responsive way of working better together. The emphasis is mainly on locally owned, practical strategies and actions that require no, or limited external support. It is expected that where external support is required, local and regional leaders will be included in the design and delivery of such support.

An improved understanding of the foundations of the region's economy²³ reinforces the importance of working more inclusively and collaboratively to create economies of scale and reduce duplication on settlement / place making and place shaping challenges and opportunities that can support economic growth.

With a co-designed strategy, no one individual or organisation is responsible. The emphasis needs to be on collective leadership (including governments), shared responsibility and commitment of identified key agencies and highly skilled and well-resourced support services that are in sync with a rapidly changing economy.

New governance arrangements²⁴ have been developed to support the implementation of the Futures Plan. CCA, as the tier of government established at the regional scale, is the logical legal entity to provide oversight for the implementation of the Futures Plan. The new arrangements will also provide an ongoing, more consistent and systemic approach to identifying and prioritising major, strategic regional projects (including infrastructure projects) and improved direct input into central government decision making to attract investment to catalyse such projects.

Negotiating and putting in place the new governance arrangements will take some time. The planning process has also generated expectation for action that is crucial to gaining momentum. An interim implementation plan has been developed to support moving into the next phase, including establishing the governance arrangements while supporting progress of initial projects.

c. Assets and strengths on which to build

Heritage of traditional industries - Including manufacturing and agriculture. Significant change in each of these industries has been a challenge and the businesses that have adapted are strong. The focus will be on continuing to help improve the resilience and competitiveness of these industries

Established reputation for agricultural output - Rich agricultural surroundings and the climate provide conditions for high quality and a diverse range of food production. The focus will be on helping local firms leverage on their distinctive products and value adding through innovative processing

Emerging industry growth sectors - Including renewable energy, precision forestry and aquaculture. The focus will be on helping develop scale, resilience and competitiveness

Emerging services sector - Particularly in health care and social assistance, which is projected to grow significantly faster than other industries. The focus will be on helping to develop the associated skilled workforce to support such growth

Tourism - A significant driver for local and regional economies with food / beverage and outdoor activities providing competitive advantages. The focus will be on developing new experiences and attractions, which help offset relatively less convenient and more expensive access to the region, and which encourage visitors to the north and south to venture into the Cradle Coast.

Fundamentals of the region's economy are quite sound - More than half the industries in the region are expected to see net jobs growth, particularly in health care and social assistance, manufacturing, construction, agriculture, accommodation, food and retail. The focus will be on making sure there is a workforce that is well-placed in terms of skills and capabilities to take on jobs that are coming, especially in full-time / higher skill occupations

²³ See Figure 7.

²⁴ Refer to Section 5.a for more information.

A connected region - The region comprises a series of interconnected, geographically distributed heartland economies, supported by the twin city regional economic zone - Burnie and Devonport are the two major service / jobs centres. Over 75% of the region's population are concentrated in the towns and cities along the coast between Latrobe and Wynyard. The focus will be on improving coordination of effort between the councils and leveraging the economies of scope and scale for the benefit all residents across the region

Assets and infrastructure - The region is well supported by roads, rail and air and sea port infrastructure. The focus will be advocating for continued improvements to strategic infrastructure and improved cost-effective connections within and into / out of the region

Educational assets - The region is well serviced with educational assets and services. The focus will be on improving coordination and integration across education and employment pathways in the region

Innovation - High levels of business entries and successful transitioning in traditional industries suggests high levels of innovation and entrepreneurship. The focus will be on helping new businesses form and existing businesses survive / scale up to deepen the economic base

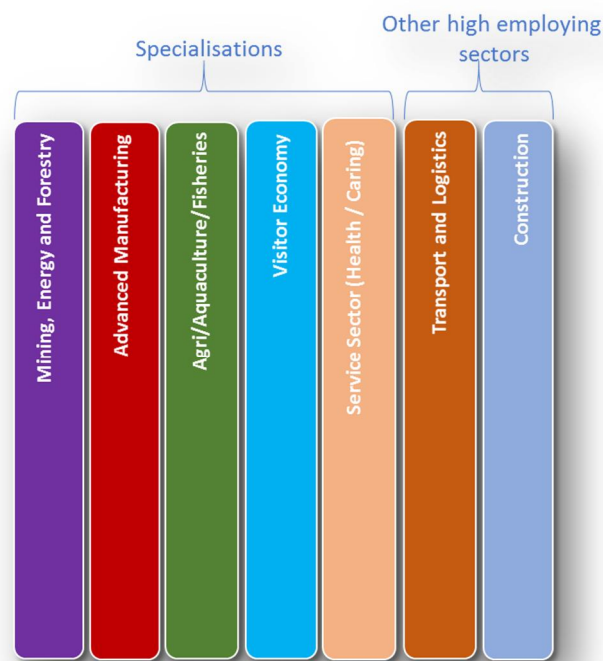


Figure 36 – High economic and jobs growth sectors

d. Practical challenges

High unemployment rates - Including youth unemployment and longer term unemployed (higher in most of our Council areas than the Tasmania average)

Low educational attainment levels - There is a need to improve education outcomes, including life skills. Many employers have trouble recruiting suitable workers. Most new jobs require post school qualifications

Shrinking working-age population - Due to a combination of older and aging workforce, static population growth and out-migration

Retaining population - The region has an ageing population and retaining youth, particularly for the workforce is a challenge for the region

Regionally dispersed population - The isolation of some communities such as King Island, far Circular Head and the West Coast presents challenges for economic and services development. The hotspot for population growth is at the eastern end of the region

Significant labour demands - A significant number of new, skilled jobs will be added to the economy, that coincides with an aging workforce, and therefore filling these jobs / skills gaps will be a challenge

e. Futures Plan intent and priority action areas

Improving educational attainment (education)

- Improved young peoples' perception of Cradle Coast region's advantages / education choices and employment opportunities
- Improved engagement, coordination and cooperation between business, schools and other educators
- Improved connection between young people and employers
- Improved collaboration, alignment and integration between post-school education providers
- Education and training providers are developing employment ready workers

Enhancing innovation and entrepreneurship (business)

- Demonstrated support for start-up and scale-up enterprises
- Improved opportunities for young entrepreneurs
- Development of supportive connections, relationships and networks

Building on industries with a competitive advantage for economic growth (industry)

- Improved internal and external perception of Cradle Coast region's advantages / education choices and employment opportunities
- Demonstrated industry support for schools' engagement / career pathways initiatives
- Improved perception of the value of and take up of VET and trades as employment pathways
- Improved middle management training and development opportunities
- Demonstrated support for identified regional specialisations / growth sectors
- Demonstrated support for emerging specialisations such as precision forestry, renewable energy and aquaculture

Leverage regional strengths to develop tourism industry (tourism)

- Continued development of collateral to showcase the region as a world class visitor experience
- Improved sector cooperation / collaboration
- Improved value adding product and business development that contributes to the region's attractiveness as a visitor destination

Capture employment opportunities from emerging caring and social assistance service sector

- Changed perception of the sector as a career pathway
- Improved connection between young people, schools, other educators and sector employers
- Improved collaboration, alignment and integration between post-school education providers and sector employers
- Retention of aged workers

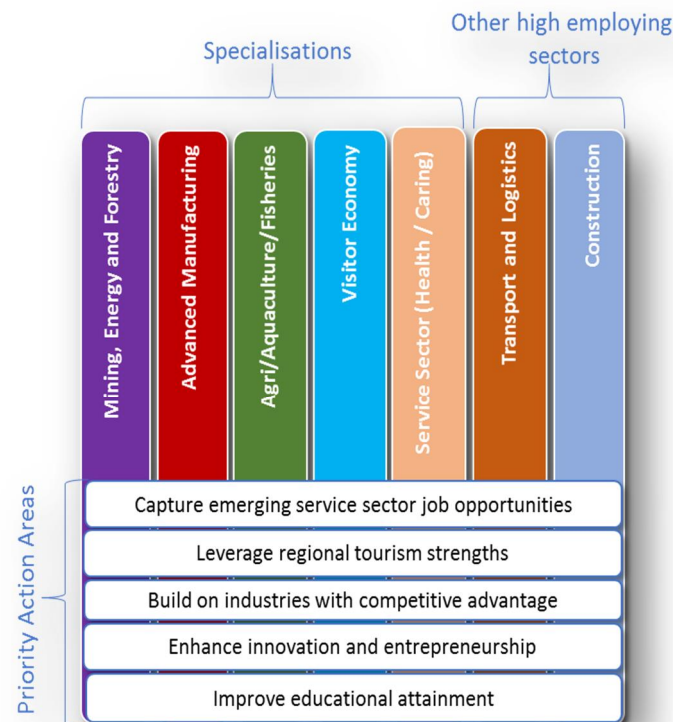


Figure 37 - Futures Plan priority action areas

f. The Futures Plan – Action Plan

Rather than an expansive, detailed plan with little chance of being implemented, the focus of the Futures Plan is more about planning *and* doing²⁵. It involves decision making, collaboration and activating resources across organisations and networks that is based on a longer-term strategic agenda, but provides an agile and adaptive, relatively short-term approach to implementation and review, for example:

- Rolling 90-day action plans and monitoring
- Annual review and reporting to taking stock
- 3 year major evaluation and reporting to reset

Such an approach focuses on starting first with what matters most, developing and implementing initial *pathfinder projects* to help embed new systems and processes, and also developing relationships, trust and confidence from some early wins.

The Futures Plan provides the agreed areas of focus and a program of priority actions for the first 18 months or so, guidance on who should be leading the action²⁶ and where to start first:

- [Regional Pathfinder Actions](#) – Initial key high-level actions that span all priority areas and require a cross-cutting collective regional response
- [Priority Area Pathfinder Actions](#) - where to start first to build relationships and trust and get early wins within each priority area
- [Other Priority Area Actions](#) – other identified priority actions that will be progressed over time

²⁵ 'Strategic Doing' is an example of such an approach - <https://strategicdoing.net/>

²⁶ See Section 5.a for the governance arrangements and who will lead actions.

g. Regional Pathfinder Actions

Project	Tasks
Develop and implement the Cradle Coast Alive Industry and Employment Awareness Program	<ul style="list-style-type: none"> Establish the Cradle Coast Alive Working Group to develop and implement the program to raise awareness of regional employment opportunities and improve connections between young people, schools, other educators and sector employers <ul style="list-style-type: none"> Map existing links / activities in schools by industry, employers, other educators, not-for-profits and other providers Work with Council Mayors and local education / youth engaged committees to expand industry / employer promotion in schools Support / expand industry and employer engagement to inform educational pathways Solicit regional industries to allocate funds to support youth engagement activities in schools Promote to families and schools the value of VET and trades as a career pathway Actively message and promote the service sector in schools to change the perception of the services sector as a career pathway Develop online promotional resources and events to showcase the region as a place to live, its growth industries and employment possibilities
Develop a Regional Economic Infrastructure Group	<ul style="list-style-type: none"> To work with the Tasmanian and Australian Governments to continue to improve strategic road, air and sea assets and infrastructure to improve connections within and into / out of the region Advocate for improved ICT infrastructure (e.g. mobile and high-speed broadband)
Support strategically significant networks and clusters	<ul style="list-style-type: none"> Develop a Cluster Manager Network for existing and emerging cluster managers to support knowledge and resource sharing, professional development and collective advocacy Support development of existing clusters and emerging specialisations such as precision forestry, renewable energy and aquaculture
Develop and implement an action-learning based Regional Education and Employment Pathways Plan	<ul style="list-style-type: none"> Establish a Cradle Coast Regional Workforce Plan Working Group to support the establishment and implementation of the Plan, includes: <ul style="list-style-type: none"> Map the jobs / skills gaps, particularly across the identified and emerging high priority growth sectors Provide a more coordinated / systemic approach by economic and jobs growth services providers to identified high growth sectors Investigate the Local Learning and Employment Networks model (Victoria) to improve alignment, coordination of service delivery in the region's education and training sector - http://www.llen.org.au/ Investigate the merit of introducing an 'online Talent Communities (Jobs Pipeline) Platform' – such as https://www.geelongcareers.org.au/
Governance - Leadership / oversight of the Futures Plan	<ul style="list-style-type: none"> Ensure CCA has a mandate / resources to fulfil its regional development role and provide oversight for the implementation of the Futures Plan Develop cross sector steering committee to guide the implementation of the Futures Plan and advising the CCA Board on related economic development matters Develop an effective system for identifying, prioritising and seeking investment for strategic regional projects

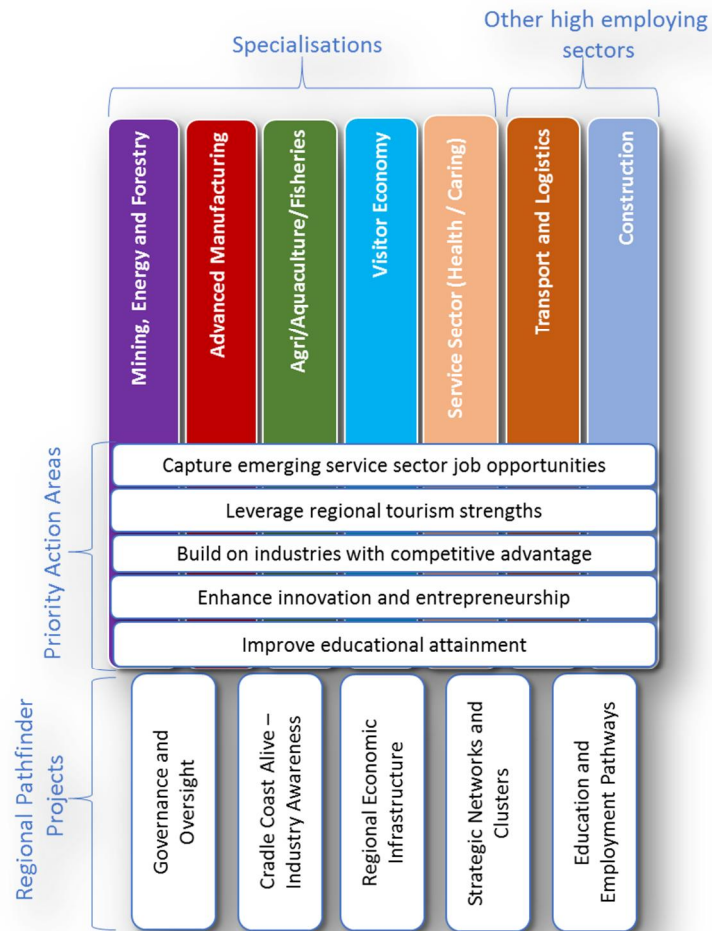


Figure 38 – The Futures Plan's key place based, cross-cutting focus areas to support more jobs and better jobs

h. Priority Area Pathfinder Actions

Education	Industry	Business	Services sector	Tourism
Promote schools-based apprenticeships Advocate for growing school-based apprenticeships and traineeships program and develop and pilot a model for schools-based apprenticeships in local councils	Establish an advanced manufacturing centre of excellence Advocate for and support the TMEC Centre becoming a world-class centre of excellence for specialised manufacturing	Facilitate the development of a network of business associations For mentoring, sharing of ideas and collaboration	Improve health professional recruitment and retention Establish an industry led steering group to develop and implement a regional health professional recruitment and retention strategy	Scale up the Cradle to Coast Tasting Trail Work with the Tasting Trail Committee to increase the depth and breadth of product and associated governance arrangements
Improve relationships between schools and specific industry sectors Develop local pilot projects to promote / connect job seekers and employers for entry level job opportunities	Establish a Battery of the Nation Taskforce Advocate for and establish the region as a centre of excellence for renewable energy	Advocate for and support the development of a network of business innovation hubs Ensure business building services are available to support innovation and 'scale-ups' across the region	Consider establishing a 'Caring Services Cluster' A network of employers, educators and schools	Map new high growth / high impact tourism experience ecosystems to identify new value adding product Develop resources and workshops to support new product development in such eco-systems (e.g. cuisine, cruise ships, eco-adventure, technical, on farm etc.)
				Develop a regional food tourism cluster That focuses on food production / value add (Tasting Trail); new product development and developing a cuisine culture
				Review the 2014 Regional Destination management Plan Develop a regional destination management approach to tourism industry and product development

i. Other Priority Area Actions

Other Actions				
Increase promotion of and engagement with UTas' Children's University	Support the scale up the Tasmanian Horticulture Export Group Work with the Group to develop and pilot a regional model for hosting / incubating / accelerating growth of emerging clusters	Identify / pilot opportunities to introduce youth entrepreneurship development activities in schools	Work with employers to retain aged workers in the caring services sector	Training and development - Develop a customised tourism operator focused approach to training
Explore opportunities to leverage the West Park / UTas development	Establish and support a regional fermentation network and help scale up the Fermentation Cluster (FermenTas)			Develop a 'hack' type tourism event to explore and pursue new product development and start-ups
Consider extending the Burnie Works Collective Impact approach across the region	Work with Councils to harmonise relevant regulations / permits across the region			Identify the potential development of an eco-adventure tourism cluster to leverage the region's natural assets
Work with COTA and employers to retain aged workers, particularly in key jobs growth sectors				
Improve UTas' engagement with industry to provide local short course / responsive options for management training and development				
Lobby the Tasmanian Government to ensure there is an effective means for VET grades counting towards ATAR				

5. Implementing the Futures Plan

a. A New Approach to Regional Collaboration

We live and work in a complex and competitive environment. Maximising impact and value means finding new ways for organisations, that are often in competition with each other, to work better together to serve and support communities.

Implementation of co-designed plans requires networked, rather than traditional, organisational governance arrangements, where competing interests do not prevent organisational leaders from thinking and acting in the interests of the region.

Working collaboratively is difficult, so new arrangements have been developed that will, at least initially, be an informal, relational process that builds regional trust, cooperation and collaboration and leverages existing arrangements to address broader cross-cutting challenges. A key objective will be to establish strong relationships and effective direct pathways into central government decision making.

The approach is about stewardship, connection, coordination and cooperation and not about aggregating, duplicating or hindering existing effective approaches. It has been developed so that it is easy to implement and will provide a lean and agile platform for working together on the complex challenges that are not effectively being dealt with separately.

The establishment of a co-design team is proposed to develop and oversee the transition to the new governance arrangements. The team will determine:

- Who will lead and who else needs to be involved
- Which elements of effective regional governance are already in place on which we can build
- Which elements are not in place and will need to be addressed
- Other practical considerations such as:
 - Transitional arrangements / time frames
 - Communication / engagement and relationship building
 - Membership / parties to the governance arrangements – building a coalition
 - Structure / decision making powers and roles / responsibilities
 - Pathways into Tasmanian and Australian Governments' decision-making processes
 - Membership of the Steering and Working Groups
 - Keeping the model simple and avoiding duplication
 - Executive / support services / associated systems / procedures
 - Costs / expenses / financial contributions
 - Accountability / measuring success - evaluating / reporting

Negotiating, refining and putting in place the new governance / support arrangements will take some time. However, the planning process has also generated expectation for action that is crucial to gaining and maintaining momentum, so an interim implementation plan has been developed to guide this crucial phase.²⁷

²⁷ See Section 5.f for more information.

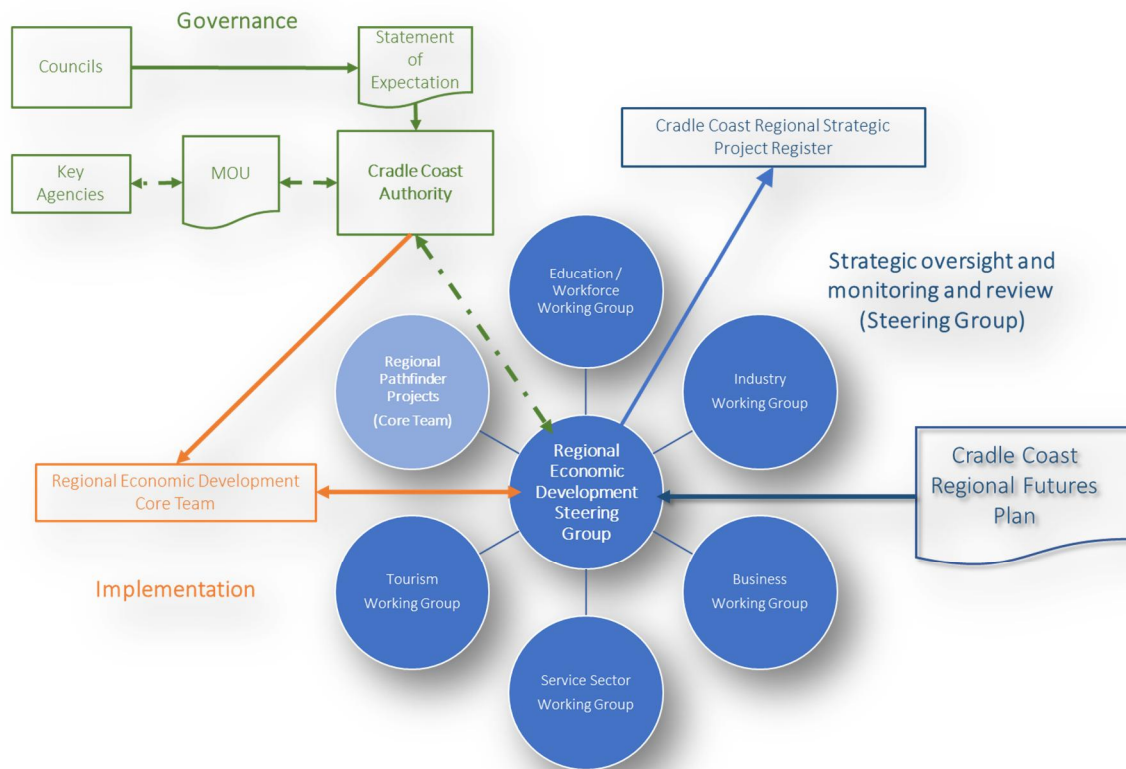


Figure 39 – Proposed Regional Futures Plan governance arrangements

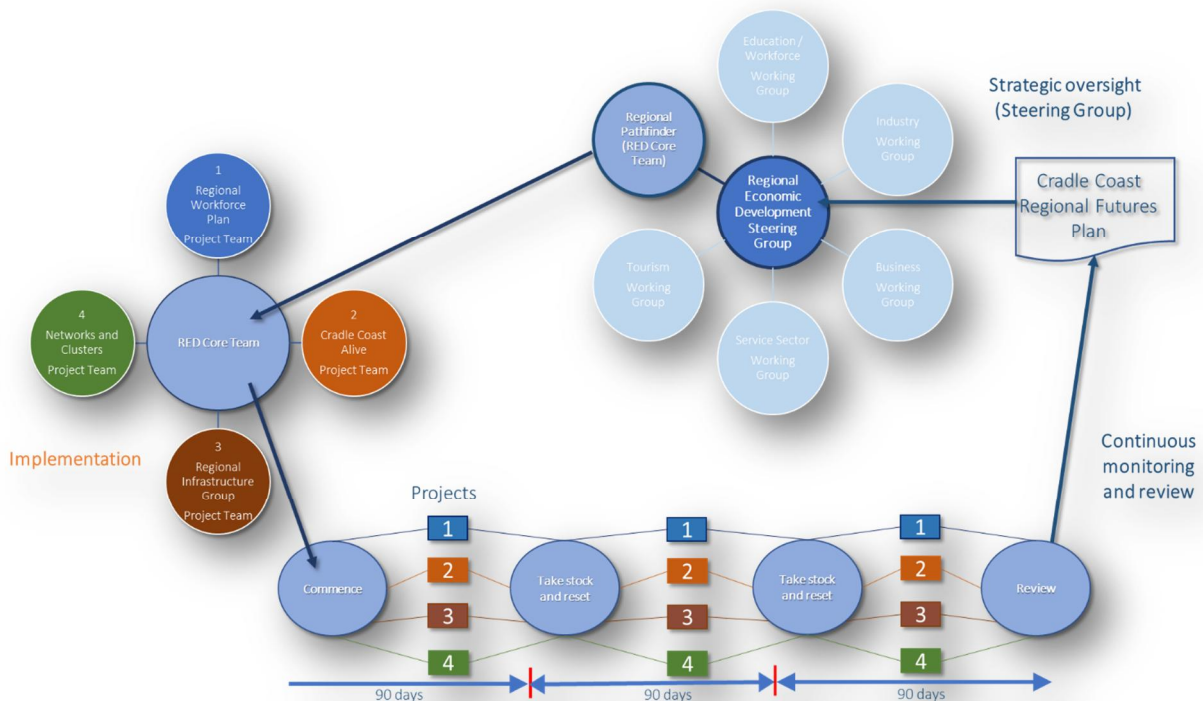


Figure 40 – Example of how project ideas are turned into action²⁸

²⁸ Adapted from Strategic Doing – see footnote 24.

Key points to note:

- [The Cradle Coast Authority](#) - CCA as the tier of government established at the regional scale, is the logical legal entity to provide the oversight for the implementation of the Futures Plan and provide the executive / administrative support for the new governance arrangements
- [Memorandum of Understanding](#) – That is independent of government election cycles. It should set out the duration of the agreement and include a demonstrated commitment from:
 - The government of the day to consult with / seek advice from the Steering Group on economic matters / decisions that impact the region and to meet with the Steering Group on a 6-monthly basis
 - Key agencies, including the resources each agency will commit; agreed processes such as response timeframes and dispute resolution procedures and each agency's roles, responsibilities and accountabilities
- [Statement of Intent](#) – The region's councils should set out their expectations and responsibilities of CCA relating to regional economic development and implementation of the Futures Plan
- [Regional Economic Development Steering Group](#) - Should be established to provide the overall systems leadership, guide the implementation and review of the Futures Plan. It should advise the CCA Board (and Tasmanian and Australian Governments when requested) on related regional economic development matters, including prioritising regional investment opportunities²⁹
 - The Councils' Chief Representative should be a member of the Steering Group to provide the means to align the region's civic and economic leadership
 - Other membership of the Steering Group should, as a minimum, comprise senior / experienced industry leaders and chairs of the respective Priority Area Working Groups
 - The Steering Group's Chair should be a representative from business or industry and should be the region's spokesperson on regional economic development matters
 - The Steering Group should monitor the implementation of the Futures Plan, help prioritise key regional investment opportunities and have a key role in advocating for any additional support for key projects
- [Regional Economic Development Core Team](#) - The Steering Group should be supported by a Regional Economic Development Core Team. The Team should comprise CCA's Regional Economic Development staff and specialist staff as required, possibly seconded from other agencies under contract. The Core Team should:
 - Provide overall systems management and administration support
 - Be a clearing house for collating / disseminating relevant regional information
 - Lead the implementation of identified Futures Plan 'regional' pathfinder projects and co-opt additional expertise / resources as required
 - Support the Steering Group and Priority Area Working Groups
 - Develop / maintain a suite of regional development tools and resources

²⁹ See Figure 39 – It is suggested that the Steering Group could also act as a regional investment assessment panel – See Section 5b.

- [Priority Area Working Groups](#) – Relates to each of the Futures Plan priority areas and should comprise senior / experienced representatives from across a range of organisations, sectors, government and other service providers and should:
 - Align efforts by sharing information and ideas and identifying opportunities for collaboration and reducing duplication
 - Establish, oversee and support specific project teams
 - Advise the Steering Group on matters relating to each priority area
- [Prioritising strategic regional investment opportunities](#) - The proposed governance arrangements should enable an ongoing, more consistent and systemic approach to identifying and prioritising strategic regional projects (including infrastructure projects) that can:
 - Provide the regional leadership / governance, processes and capability to support related decision making
 - Identify opportunities that are catalytic and provide the best return on investment for the region
 - Compare / prioritise investment opportunities across sectors and / or at differing scales
 - Create a prioritised register / pipeline of regionally significant, development ready projects
 - Leverage regional plans - better align local / regional objectives and priorities where external resources and funding support maybe required
 - Seek investment to catalyse key projects

b. Proposed Cradle Coast Strategic Investment Management Framework

Leveraging existing strengths and pursuing new economic opportunities is a priority for growing our local and regional economies. A key role for regional leaders and decision makers is to seek investment for such opportunities.

There is currently no objective and consistent method for identifying and prioritising such investment opportunities in terms of their contribution to sustainable economic growth. A new, more consistent and systemic approach is proposed to:

- Compare / prioritise investment opportunities across sectors and / or at differing scales
- Identify opportunities that are catalytic and provide the best return on investment for the region
- Understand the strategic context of projects and flow on implications for other related projects

Such an approach would:

- Improve public confidence in investment decision making
- Ensure investment decisions leave a substantial and enduring benefit
- Increase government and / or private investor confidence in knowing priority projects have strong support
- Provide a pathway to progress priority projects identified within existing strategies and an ongoing process to identify and progress new projects
- Ensure that projects are sufficiently scoped, planned and costed before being presented to the supplier market

The aim of the Framework is to establish an objective and robust process to maximise value for money when making regional investment decisions at various scales and progress

strategic investment opportunities that benefit the region. The Framework should be developed early in the implementation phase and should include:

- [Cradle Coast Strategic Investment Portfolio](#) - A cross-cutting portfolio of identified foundation and target sector investment initiatives. To be included, initiatives should address an identified evidence-based problem or opportunity of sector or sub-regional or regional significance³⁰
 - Foundational initiatives - target the identified deeply embedded structural issues constraining our economy (predominantly the responsibility for local, regional or central governments)
 - Target sector initiatives - address specific needs or growth opportunities within the region's high impact / high growth sectors (predominantly the responsibility of key sector stakeholders)

Initiatives included in the portfolio should generally be identified within current sector or community plans and be consistent with the key priority areas of the Futures Plan and may or may not yet be development ready.

- [Cradle Coast Regional Strategic Projects Register](#) - As identified initiatives in the Regional Investment Portfolio progress to development ready project stage, they would be considered for inclusion in the Cradle Coast Regional Strategic Projects Register. The Register should:
 - Showcase a prioritised tiered list and summary of development ready, priority public and private investment opportunities:
 - Tier 1 - Projects that would result in a significant increase in regional economic productive capacity, and may require substantial assistance or provision of funding beyond the region's available resources
 - Tier 2 - Projects that would result in an increase in economic productive capacity, which may only be significant at the sub regional level and are likely to require material assistance beyond the region's (or sub region's) available resources
 - Tier 3 – Enabling projects such as strategic plans and capacity building projects that work towards shaping / refining the strategic direction of the region and may need some assistance or provision of funding beyond the region's (or sub-region's / local) available resources
 - Support proponents of projects included in the register for making applications for grant / investment funding
 - Support, local, regional and State and Federal Government decision making

For a project to be considered for inclusion in the Register, proponents should be required to meet specific criteria:

- Proposed eligibility criteria:
 - Proponents could be business, government or community based if they have the credentials to be able to effectively commit to a project
 - Projects should be identifiable within their organisation strategy / related financial plans
 - Request for inclusion in the Register should be with consent of the business owner or authorised officer

³⁰ It is envisaged that projects of local significance will be prioritised by each Council and so would not be considered within the Regional Investment Management Framework.

- Proponents should have a completed business case and proof of concept for the project, including demonstrated evidence of demand and wide support
- Projects should demonstrate that they are development ready (to approvals / likely compliance stage). This does not necessarily mean the project has full funding
- Proponents should demonstrate that they have the project management experience and resources to successfully complete the project
- Proposed merit criteria:
 - The extent the project aligns with one or more priority areas of the Futures Plan
 - The extent the project aligns with one or more strategic priority areas of other key related plans and strategies (e.g. sub-regional, state and national)
 - Demonstrated scale and impact of the project³¹
 - Demonstrated value for money³²

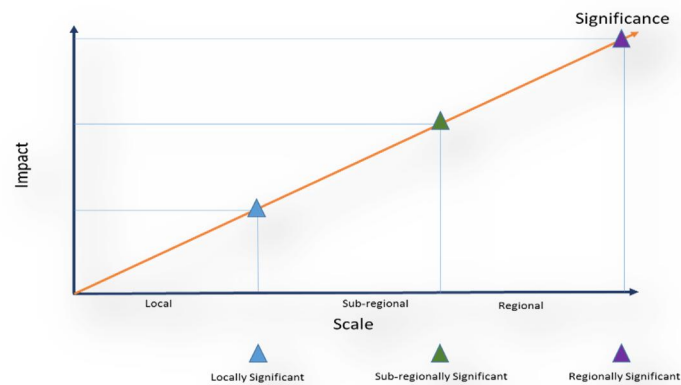


Figure 41 - Scale and impact indicator (significance)

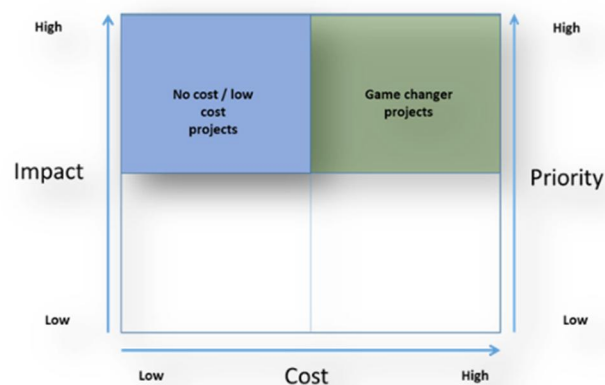


Figure 42 - Cost and Impact Indicator (value for money)

³¹ It is envisaged that the Register will capture and categorise significant projects at the sub-regional and regional scales and that the responsibility for ranking regional projects will be based on recommendations from the Regional Economic Development Steering Group to the CCA Board.

³² A function of impact, scale and cost - Derived from the Benefit Cost Analysis in the proponent's project business case.

- Regional Investment Decision Making - The approach emphasises the importance of collective leadership and regional governance arrangements. It is proposed that CCA, with the advice from the Regional Economic Development Steering Group, act as the agent to shape policies and investments through an investment management and attraction framework that provides:
 - Regional cooperation, goodwill and support at all levels of government
 - Practical, actionable advice on which investments should be actively pursued to best achieve regional objectives³³
 - A transparent public regional investment portfolio with benefits and solutions clearly articulated to the community and potential investors
 - A pipeline portfolio of prioritised, prequalified, investment ready investments available for funding

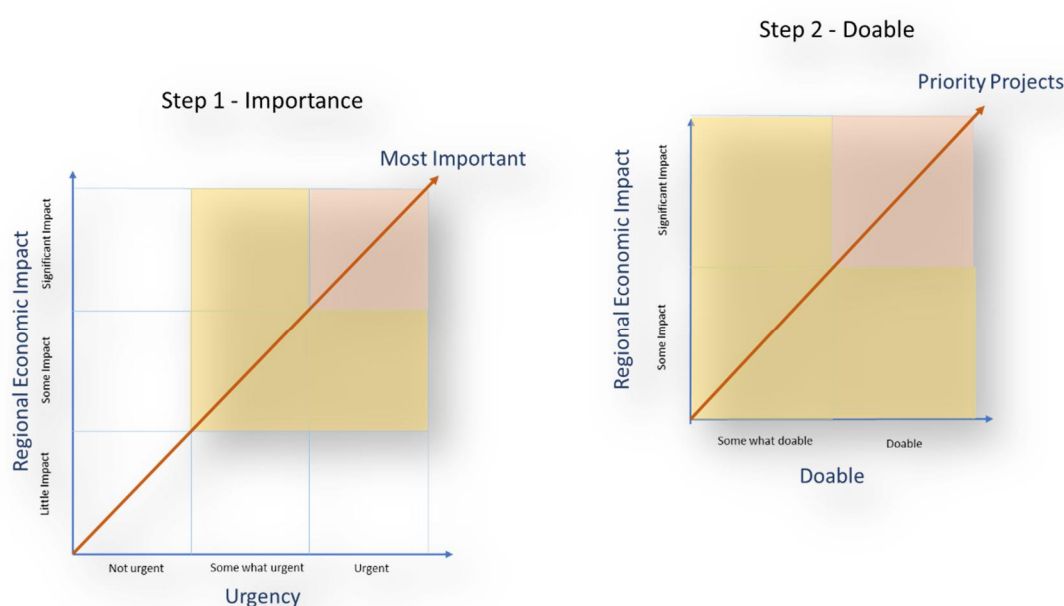


Figure 43 – Prioritising regional investable bets

- Strategic Investment and Related Project Management Capability - The process also needs to include provision of training and development opportunities, particularly for key Council and CCA management / staff and elected representatives to improve strategic investment decision making and project management capability. Training of staff who can oversee the development, implementation and ongoing operation of the Framework will be crucial. It is also suggested that decision makers undergo specific training. The Victorian Government provides training in this regard.³⁴

It is proposed that the detailed systems / processes³⁵ and training issues will be dealt with early in the implementation phase of the Futures Plan.

³³ See Figure 43.

³⁴ See <https://www.dtf.vic.gov.au/investment-management-standard/investment-management-facilitator-training-and-accreditation>

³⁵ See Figures 39 and 44 for context.

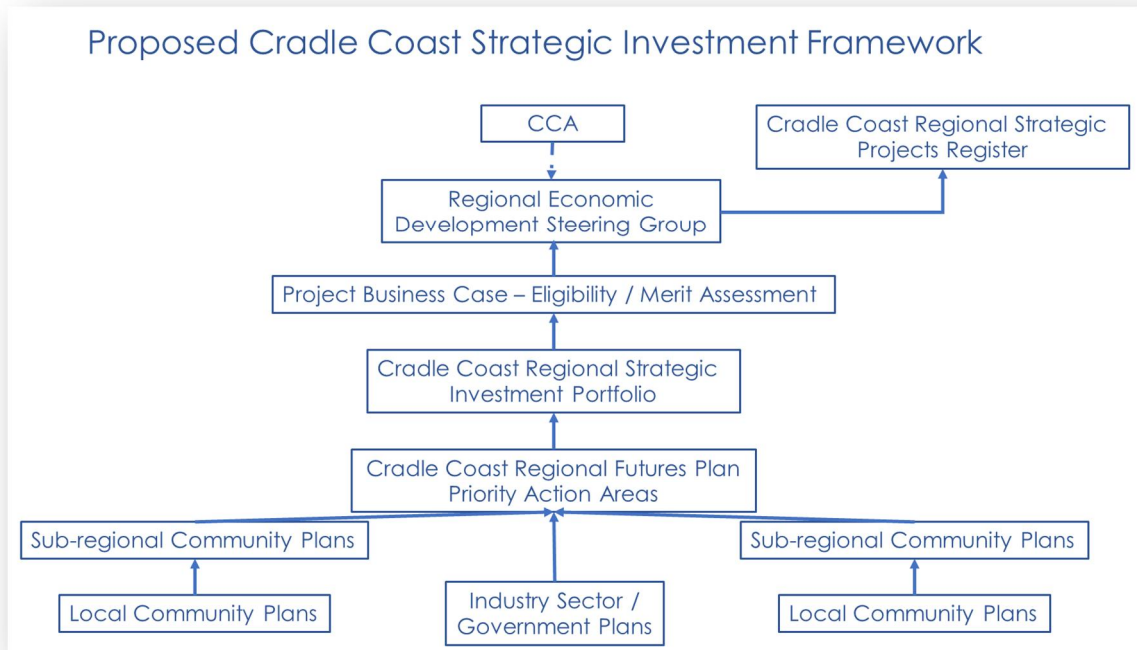


Figure 44 - Indicative Regional Strategic Investment Framework

c. Futures Plan evaluation and reporting

The Futures Plan is premised on:

- The region's economic prosperity being dependent on the specialisations and competitiveness within and across key sectors that need to be underpinned by a workforce equipped with the skills to support such growth - which is currently being constrained by several entrenched economic and social challenges
- An effective response to these challenges spans many sectors, organisations and responsibilities, suggesting a more networked and collaborative effort is required that ensures organisations, often in competition with each other, have a new / better way of working together
- The Futures Plan and proposed governance arrangements provide a crucial platform for working together on the complex challenges that are not effectively being dealt with separately

Implementation of the Futures Plan will be a collaborative effort, with diverse actors and initiatives contributing to the shared strategic agenda. The agenda is subject to a range of complex, external economic, social and environmental circumstances.

It will be difficult to attribute the implementation of the Futures Plan directly to economic and jobs growth, however, it is important to capture its positive contribution, e.g. the difference the new governance arrangements and action plan make.

While the strategic agenda is long-term, implementation needs to be agile and adaptive, and relatively short-term. Short-term monitoring and reporting are necessary to respond to emergent, changing, or unpredictable events and opportunities. Annual reporting will help keep the Futures Plan on track and provide the chance to respond to new challenges and opportunities relating to the key priority areas. A three-year review time-frame provides the Steering Group and key stakeholders with the opportunity to assess the impact of the Futures Plan and reset the agenda and action plan for the next three years.

The Futures Plan is based on the principles of *action learning*, meaning that the implementation and evaluation are integrated and occur at the same time. The evaluation will be lean and targeted to provide rapid feedback about what is and is not working. Each of the three reporting cycles will provide information to support continuous improvement and systems change.

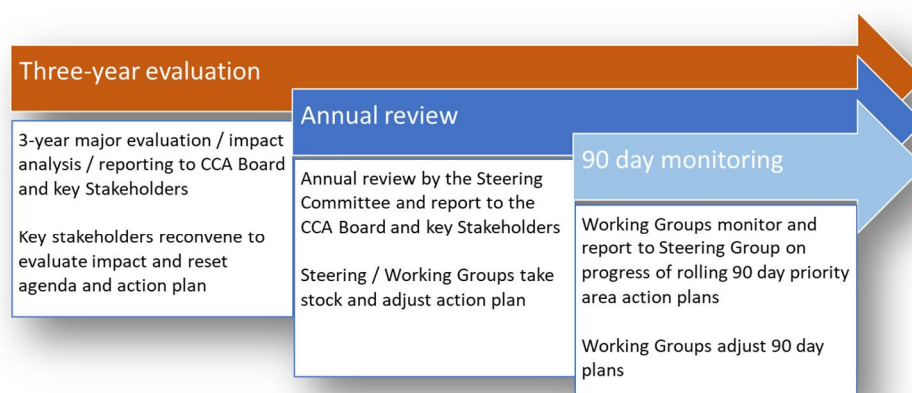


Figure 45 - Futures Plan reporting, evaluation and continuous improvement cycle

CCA's Regional Economic Development Manager will have oversight for evaluation and reporting processes on behalf of the CCA Board. The Board will be responsible for communicating related reports to the key stakeholders.

The evaluation plan, including related measures of success, will be developed in the early stages of the Interim Implementation Plan. A Regional Futures Planning Evaluation Framework has been created to inform the process.

The focus of the evaluation will be on the activities and outcomes under the Futures Plan's direct sphere of influence. The following logic model draws on the intent of the Futures Plan³⁶ and demonstrates its sphere of influence, e.g. where it can have the greatest impact in overcoming the identified challenges.

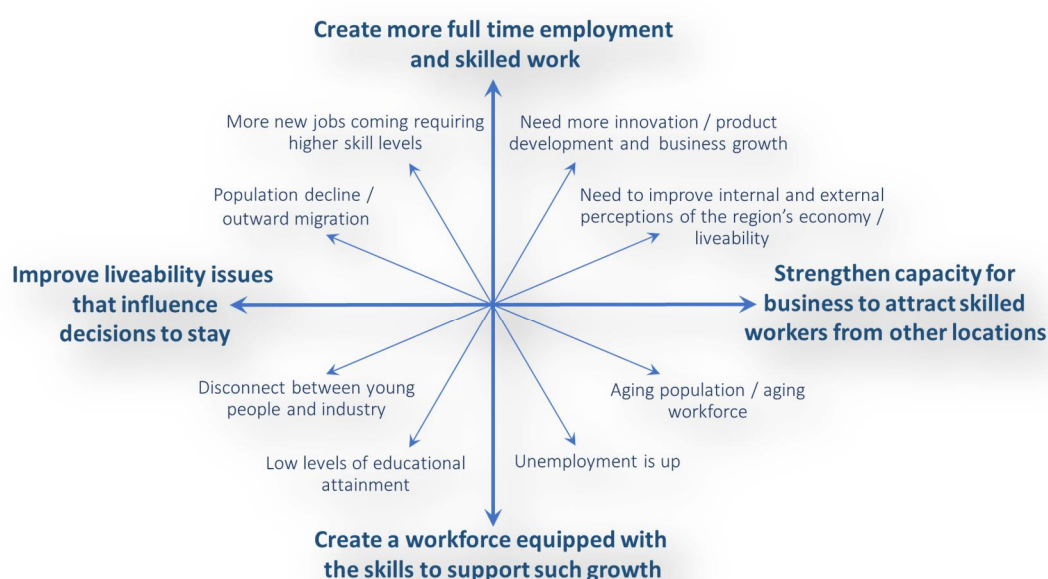


Figure 46 – The Futures Plan sphere of influence

³⁶ See section 4.e.

d. Futures Plan Regional Economy Dashboard

While the Futures Plan will not be responsible for every facet of economic development, it is important to know how the economy is tracking. A Cradle Coast Regional Economy Dashboard will be developed and made available via the CCA's website.

Other regional economic and community data is available via the Cradle Coast Regional Profile - <https://economy.id.com.au/cradle-coast>.

e. Regional economic development tools and resources

A range of online resources and important links are available for use via the CCA's new website to be launched in late 2018.

Resources will be developed and updated from time to time and initially include:

- The *Choose Cradle Coast* website – regional showcase
- Cradle Coast Regional Investment Prospectus
- Project Management Templates
- Regional Economic and Community Profiles / Regional Economy Dashboard
- RED Toolbox – online economic group engagement platform

f. CCA Futures Plan Interim Implementation Plan

The CCA Board will have overall responsibility for resourcing the Interim Implementation Plan. CCA's Regional Economic Development Manager will be responsible for its implementation until such time as the new governance arrangements are formally adopted.

The proposed Co-design team should act as the interim Steering Group until such time as the formal arrangements are adopted.

Action	Comments	Timing
Confirm resourcing requirements for RED Core team	<ul style="list-style-type: none">• Confirm interim resources• Negotiate short term secondments if required	–Jan - Feb
RED Core team develops communication and engagement plan	<ul style="list-style-type: none">• Includes online version of the Futures Plan and communication about the plan• Complete populating <i>Choose Cradle Coast</i> new online regional showcase in time for launch event• Develop a launch event (around Feb)• Develop Regional Economic Development Network and online news feed• Convene meetings with Councils and key stakeholders to present / discuss Futures Plan	Jan – ongoing
CCA Chair and Chief Rep negotiate Statement of Expectations with Partner Councils	<ul style="list-style-type: none">• Relating to expectations of CCA's role / contribution to regional economic development	Feb – Mar
CCA Board appoints Governance Co-design team	<ul style="list-style-type: none">• Co-design team to act as Interim Steering Committee• Includes developing terms of reference and membership• Allocate resourcing / support for the team	Feb

Negotiate an MOU with Tasmanian Government and key agencies	<ul style="list-style-type: none"> CCA and Co-design team Chairs and Manager Regional Economic Development negotiate MOU 	Feb – Apr
RED Core team supports Co-design team establish new governance arrangements	<ul style="list-style-type: none"> Establish rules / codes of practice / Terms of Reference Determine membership / Chair of the Steering Group Develop associated systems / processes Determine ongoing resourcing needs Costs / expenses and sources of funds Accountability – evaluating / reporting 	Feb – May
RED Core team reviews 2014 Cradle Coast Regional Destination Management Plan	<ul style="list-style-type: none"> Establish a working group to re-prioritise the existing relevant content and a process to deal with identified gaps 	Feb - Apr
RED Core team maps new tourism high growth / high value experience ecosystems to identify new value adding product	<ul style="list-style-type: none"> As part of the review of the Destination Management Plan – map the high growth / high impact tourism eco-systems – such as food / cuisine / technical / industrial and outdoor adventure tourism 	Feb - May
RED Core team researches / Case studies – Victorian Local Learning and Employment Networks model (Victoria)	<ul style="list-style-type: none"> Investigate the Local Learning and Employment Networks model (Victoria) to improve alignment, coordination of service delivery in the region's education and training sector - http://www.llen.org.au/ 	Mar - Apr
RED Core team researches / Case studies use of the online 'Talent Community Platform' in regions / sectors with similar profiles to Cradle Coast	<ul style="list-style-type: none"> Investigate the merit of introducing an 'online Talent Communities (Jobs Pipeline) Platform' – such as https://www.geelongcareers.org.au/ 	Mar - Apr
Establish and support Priority Area Working Groups	<ul style="list-style-type: none"> RED Core team works with Co-design team to support establishment of working groups Includes developing Terms of Reference 	Mar – ongoing
RED Core team supports development of strategically significant networks / clusters	<ul style="list-style-type: none"> Establish Cluster Managers Network Includes developing / supporting online communities of interest / practice such as: <ul style="list-style-type: none"> Local fermentation group Supporting scale up of the Tasting Trail Potential food tourism cluster Potential outdoor tourism cluster Health professional recruitment / retention working group Battery of the Nation working group Support establishment of some initial networking activities Explore potential support services / arrangements 	Mar - ongoing
RED Core team establishes project teams to progress regional pathfinder projects (except where such projects will be led by a Priority Area Working Group)	<ul style="list-style-type: none"> Establish a Regional Economic Infrastructure Group Establish the Cradle Coast Alive - Industry and Employment Awareness Program Working Group 	Mar - ongoing

	<ul style="list-style-type: none"> Establish Cradle Coast Regional Workforce Plan Working Group and develop Skills Tas funding proposal 	
Develop forums / workshops to develop a culture of working regionally	<ul style="list-style-type: none"> Sessions include networked / distributive leadership; collaboration; developing and supporting networks / clusters 	Mar - ongoing
Working Groups start to develop 90-day action plans	<ul style="list-style-type: none"> RED Core team assists Working Groups develop action plans Working Groups identify potential project team members 	Mar - May
Develop Futures Plan evaluation and reporting systems and processes	<ul style="list-style-type: none"> Includes developing success factors performance measurement criteria / targets etc Conduct first 90-day review Develop online Regional Economic Growth Dashboard 	Mar - Jun
Review CCA related internal systems / processes / resourcing	<ul style="list-style-type: none"> Includes capacity and capability needs Negotiate related funding via Council and Government budgetary processes 	Mar - Jun
Establish 6 monthly meetings with Government of the day	<ul style="list-style-type: none"> CCA and Co-design team Chairs host first meeting First meeting should coincide with Government and key stakeholders agreeing to sign MOU 	Apr- ongoing
Map and analyse available business building services / hubs that support innovation/ 'scale-ups' across the region	<ul style="list-style-type: none"> To advocate for increased support to address the identified gaps 	Apr- Jun
Implement new governance arrangements	<ul style="list-style-type: none"> Establish Steering Group / appoint Chair and formalise terms of reference Handover of responsibilities from Co-design team to Steering Group 	May
Develop regional investment management framework	<ul style="list-style-type: none"> Includes investment decision making training for staff and decision makers Developing systems and processes Development of a strategic economic projects register 	Jun - Jul
Develop a place-based model for regional collaboration	<ul style="list-style-type: none"> Once the new governance arrangements are up and running, the Steering Group should develop a model for regional collaboration based on the hub and spoke - twin city service hub structure³⁷ 	2019 / 2020

6. Attachments

- Key Stakeholder Groups List
- Related Plans and Strategies Register
- List of Futures Plan participants / contributors

Other

- Cradle Coast Regional Futures Plan Evaluation Framework
- Regional Pathfinder Reports / Other call to action documents
 - Making Sense of the Census

³⁷ See Figure 7.

- Pathfinder Final Report
 - Cradle Coast Journey to Work and Jobs Analysis
- Outputs of the Engagement Sessions

Attachment A - Key Stakeholder Groups

This is a notional list based on organisations who have participated to date or have a recognised key role in the Futures Plan priority action areas. Future roles could include advice / advocacy and or participation in specific Futures Plan actions.

Education / Workforce	Industry	Business	Services Sector	Tourism	Governance
Australian Government - Employment Facilitator North/North West Tasmania	Australian Government - Employment Facilitator North/North West Tasmania	Enterprise Centres Tasmania Network – i.e. Switch Tasmania, Braddon Business Centre et al.	Primary Health Tasmania	Cradle Coast Authority including Regional Tourism Organisation	Cradle Coast Authority
Skills Tasmania	Chambers of Commerce	Participating business leaders	Participating business leaders	Coast to Cradle Tasting Trail	Councils
TasTAFE	University of Tasmania	Registered Training Organisations	HR Plus (recruitment)	Local Tourism Associations	Skills Tasmania
Council of the Aging	CSIRO	Skills Tasmania	UTAS Centre for Rural Health / Rural Clinical School	Ten Days on the Island	TasCOSS
Tasmanian Education Department	FermenTasmania	Councils	TasCOSS	Adventure / eco-tourism operators	Regional Development Australia Tasmania
Australian School Based Apprenticeships	Horticulture Export Tasmania Group	Cradle Coast Authority	Family Based Care	Tourism Industry Council of Tasmania	Tasmanian Department of State Growth
School Education Clusters / High School principals	Tasmanian Minerals and Energy Council	Chambers of Commerce	Rural Health Tasmania	Participating business leaders	University of Tasmania
University of Tasmania	Hydro Tasmania		Councils	Events Tasmania	Primary Health Tasmania
Beacon Foundation	Tas Networks		Cradle Coast Authority	Tourism Tasmania	Participating Industry leaders
Business / Industry associations	Tasmanian Farmers and Graziers Association		Chambers of Commerce	Councils	
Jobactive Providers	Forestry Industries Association Tasmania		National Disability Insurance Australia	Tasmanian Hospitality Associations	
University of Tasmania	Office of Coordinator General				
Councils	Tasmanian Seafood Industry Council				
Cradle Coast Authority	Participating business leaders				
P-TECH	Tasmanian Department of State Growth				
	AusIndustry				
	Austrade				
	Infrastructure Tasmania				
	Tas. Logistics Committee				
	Councils				
	Cradle Coast Authority				

Regional and economic development is complex and there are many actors at many scales already working in this space. A key role for the Futures Plan is to not duplicate what other actors are doing and where possible align their respective efforts when opportunities present themselves.

Keeping the register up to date and making it available via the CCA website will provide a useful resource for aligning effort.

Key Related Policy / Strategy	Scale	Link
LG / Regional Development / Place based	Local / Regional	
Tasmania Report 2017		http://www.tcci.com.au/Services/Policies-Research/Tasmania-Report
Tasmanian Population Growth Strategy	State	http://www.stategrowth.tas.gov.au/_data/assets/pdf_file/0014/124304/Population_Growth_Strategy_Growing_Tas_Population_for_web.pdf
Local Council Strategic and Economic Plans	Local	See Council websites
Sustainable Murchison Plan	Sub-Regional	http://www.warwyn.tas.gov.au/webdata/resources/files/2016%2011%2010%20-%20Sustainable%20Murchison%20Community%20Plan%202040%20-%20FINAL-1.pdf
Cradle Coast NRM Regional Strategy 2015-2016	Regional	http://www.cradlecoastnrm.com/hot-topics-current/cradle-coast-nrm-regional-strategy-2015-2016
Northern Cities Development Initiative	Regional	http://cg.tas.gov.au/home/major_projects/northern_cities_major_development_initiative
RDA Tasmania Regional Plan	State	https://www.rdatasmania.org.au/client-assets/documents/documents-and-reports/RDA%20Tasmania%20Regional%20Plan_2015%20-%202016_FINAL.pdf
Mapping Regional Capability for Economic Development	State	https://www.rdatasmania.org.au/client-assets/documents/documents-and-reports/RDA%20Tasmania%20Capability%20Report%20(FINAL2).pdf
LG Pro State of the Sector Report	By State	http://www.lgprofessionalsaustralia.org.au/uploads/3/7/4/2/37423121/sos_report_2017-fa04.pdf
Tasmania's draft climate change action plan	State	http://www.dpac.tas.gov.au/_data/assets/pdf_file/0006/275343/Embracing_the_Climate_Challenge-Action_Plan.pdf
Deloitte – Be Bold Tasmania		https://www2.deloitte.com/content/dam/Deloitte/au/Documents/mediarelease/deloitte-au-dpr-be-bold-tasmania-tasfocus-210218.pdf
Regions at the Ready: Investing in Australia's Future - House of Representatives Select Committee on Regional Development and Decentralisation - June 2018	National / State / Regional	http://parlinfo.aph.gov.au/parlInfo/download/committees/reportrep/024136/toc_pdf/RegionsattheReadyInvestinginAustralia'sFuture.pdf;fileType=application%2Fpdf?mc_cid=a2245509b0&mc_eid=9ea3889753
Smart Cities Plan	National	https://cities.dpmmc.gov.au/
Australian Smart Communities Association - Concepts and Considerations	National	https://static1.squarespace.com/static/5ae9016f697a98cf76170c5f/t/5b45a246575d1f79de7a30c6/1531290277625/ASCA_2016+Concepts+and+considerations+for+future+of+smart+communities.pdf

Key Related Policy / Strategy	Scale	Link
		https://www.australiansmartcommunities.org.au/smart-communities-future-vision-0 https://home.kpmg.com/au/en/home/insights/2017/11/smart-city-maturity-assessment.html https://home.kpmg.com/au/en/home/insights/2017/11/harnessing-the-smart-city-opportunity.html https://home.kpmg.com/au/en/home/insights/2017/11/smart-cities-australia-snapshot-2017.html
Blueprint for Investing in Regional City Deals 2017		http://www.regionalaustralia.org.au/home/wp-content/uploads/2017/06/Blueprint-for-Investing-in-City-Deals_Report.pdf
Regional Australia Institute		Related key themes: <ul style="list-style-type: none"> • Regional Jobs of the Future • Great Small Cities • Small Town Change • Older and Successful • Regions in Transition http://www.regionalaustralia.org.au/home/
Shifting the Dial 5- year Productivity Review 3 AUGUST 2017 - Productivity Commission	National	https://www.pc.gov.au/inquiries/completed/productivity-review/report/productivity-review.pdf
Sector Specific		
Tasmanian Visitor Economy Strategy 2015 - 2020	State	http://www.t21.net.au/
Tasmanian Advanced Manufacturing Action Plan	State	http://www.stategrowth.tas.gov.au/_data/assets/pdf_file/0011/136568/tasmanian_Advanced_Manufacturing_Action_Plan.pdf
Caterpillar Taskforce Report	Regional	https://www.stategrowth.tas.gov.au/_data/assets/pdf_file/0003/135597/Caterpillar_Transition_Taskforce_Final_Report_May_2016_for_web.pdf
Manufacturing in Tasmania	State	https://www.stategrowth.tas.gov.au/_data/assets/pdf_file/0007/157327/Manufacturing_in_Tasmania.pdf
Wood Purchasing	State	http://www.purchasing.tas.gov.au/Documents/Tasmanian-Wood-Encouragement-Policy.pdf
Manufacturing – A roadmap for unlocking future growth opportunities in Australia – Nov 16	National / sector	https://www.csiro.au/en/Do-business/Futures/Reports/Advanced-manufacturing-roadmap CSIRO Futures re specific sector opps / emerging technologies - http://cdn.aigroup.com.au/Submissions/Workplace_Relations/2018/AiGroup_Submission_Future_of_Work_Inquiry_feb2018.pdf
Tasmanian Defence Strategy	State	https://www.stategrowth.tas.gov.au/_data/assets/pdf_file/0019/131347/Defence_strategy_Web_20160218.pdf

Key Related Policy / Strategy	Scale	Link
Tas Air and Sea Access Strategy 2015 - 2020	State	https://www.tourismtasmania.com.au/_data/assets/pdf_file/0015/56121/Tasmanian-Access-2020-Strategy.pdf
Restoring Tasmania's Energy Advantage	State	https://stors.tas.gov.au/store/exlibris6/storage/2014/12/22/file_1/1318419.pdf
Battery of the Nation	State / Sector	https://arena.gov.au/assets/2018/06/battery-of-the-nation-analysis-of-the-future-national-enlectricity-market.pdf https://www.stategrowth.tas.gov.au/_data/assets/pdf_file/0017/100637/Tasmanian_Energy_Strategy_Restoring_Tasmanias_Energy_Advantage.pdf.pdf
State Forestry Plan	State / Sector	https://www.stategrowth.tas.gov.au/_data/assets/pdf_file/0004/148855/Strategic_Growth_Plan.PDF
Dairy	State / Sector	http://www.dairytas.com.au/files/plan/tasmanian_dairy_industry_strategic%20plan_2016-2021.pdf
Agriculture	State / Sector	http://dpirwe.tas.gov.au/agriculture/tasmanias-agri-food-plan-2016-2018
Aquaculture	State / Sector	http://dpirwe.tas.gov.au/sea-fishing-aquaculture/marine-farming-aquaculture/changes-to-salmon-industry-regulation/salmon-industry-growth-plan http://dpirwe.tas.gov.au/sea-fishing-aquaculture/marine-farming-aquaculture
Hospitality	State / Sector	http://www.skills.tas.gov.au/skillstas/industryresources/hospitalitytourismoutdoorrec/Hospitality-Industry-Strategic-Plan.pdf
Global education		https://www.stategrowth.tas.gov.au/_data/assets/pdf_file/0008/149804/Global_Education_Strategy_for_web.pdf
Smart Specialisation / Growth Centres		
		https://www.industry.gov.au/strategies-for-the-future/growth-centres https://www.industry.gov.au/sites/g/files/net3906/f/May%202018/document/pdf/industry_growth_centres_initiative_-_sector_competitiveness_plans_overview.pdf Advanced Manufacturing - https://www.industry.gov.au/strategies-for-the-future/growth-centres Food and Agri - https://www.industry.gov.au/strategies-for-the-future/growth-centres Mining - https://www.metsignited.org/Category?Action=View&Category_id=74

Key Related Policy / Strategy	Scale	Link
		Energy - https://www.nera.org.au/Attachment?Action=Download&Attachment_id=77
Exports / Trade		
		http://www.premier.tas.gov.au/releases/tasmanias_first_trade_strategy
Infrastructure		
State Infrastructure Pipeline	State	https://www.stategrowth.tas.gov.au/_data/assets/pdf_file/0020/172415/Infrastructure_Project_Pipeline_2018.pdf https://www.stategrowth.tas.gov.au/infrastructure_tasmania/publications
Transport / Freight / Logistics Related		
Western Tasmania Export Corridor Plan 2017	State	https://www.stategrowth.tas.gov.au/_data/assets/pdf_file/0014/152105/Western_Tasmania_Export_Corridor_Plan_Consultancy_Report.PDF
Freight related	State	https://www.stategrowth.tas.gov.au/infrastructure_tasmania/freight/tasmanian_integrated_freight_strategy https://www.stategrowth.tas.gov.au/_data/assets/pdf_file/0017/134216/Tasmanian_Integrated_Freight_Strategy_Part_one.pdf https://www.stategrowth.tas.gov.au/_data/assets/pdf_file/0018/134217/Tasmanian_Integrated_Freight_Strategy_Part_two.pdf
Workforce / Skills / Training Related		
Tasmanian Workforce Plans	Sector	http://www.skills.tas.gov.au/employersindustry/workforceplans
Skills – workforce planning	State	https://www.skills.tas.gov.au/skillstas/policiesstrategies/investing-in-skills-for-growth/Investing-in-Skills-for-Growth-A4.PDF
Other skills / work related docs	National	New Work Order Series – https://www.fya.org.au/report/new-work-order/
		https://www.jobs.gov.au/regional-employment-trials-program
		https://www.jobs.gov.au/news/australian-jobs-2018-now-available https://docs.jobs.gov.au/system/files/doc/other/australianjobs2018.pdf
		http://www.regionalaustralia.org.au/home/wp-content/uploads/2016/11/The-Future-of-Work_report.pdf
Ageing workforce		http://www.regionalaustralia.org.au/home/wp-content/uploads/2017/10/RAI_Ageing-and-work-in-regional-Australia_report-1.pdf

Key Related Policy / Strategy	Scale	Link
		https://www.acs.org.au/content/dam/acs/acs-documents/16-0026_DATA61_REPORT_TomorrowsDigitallyEnabledWorkforce_WEB_160128.pdf
		https://beaconfoundation.com.au/wp-content/uploads/2017/06/2017-Outcomes-Report.pdf
		https://beaconfoundation.com.au/wp-content/uploads/2017/06/2017-Outcomes-Report.pdf
		https://www2.deloitte.com/content/dam/insights/us/articles/4051_The-smart-factory/DUP_The-smart-factory.pdf https://www2.deloitte.com/insights/us/en/focus/industry-4-0.html
Labour market conditions in Tasmania and Launceston Ivan Neville - Labour Market Research and Analysis - Department of Jobs and Small Business		Presentation PDF in folder
		http://lmip.gov.au/default.aspx?LMIP/EmploymentProjections
Agri-tourism	State	https://www.stategrowth.tas.gov.au/_data/assets/pdf_file/0019/157402/Draft_Agri-Tourism_Strategy_September_2017.pdf
Agri-food plan	State	http://dpiw.tas.gov.au/Documents/Agri-Food%20Plan%202016-2018.pdf http://dpiw.tas.gov.au/Documents/Sustainable_Agri-food_plan_2016-18_Update.pdf
Innovation		
National Science and Innovation Agenda	National	https://www.innovation.gov.au/
Innovation – Australia 2030 – Prosperity Through Innovation		https://www.industry.gov.au/sites/g/files/net3906/f/May%202018/document/pdf/australia-2030-prosperity-through-innovation-full-report.pdf https://publications.industry.gov.au/publications/australianinnovationsystemreport2017/index.html
CSIRO Futures		https://www.csiro.au/en/Showcase/CSIRO-Futures

Project Management

- Peter Murden (Project Manager)
- Daryl Connelly (Project Sponsor)

Project Reference Group

- Mike Brindley
- Rodney Greene
- Lara Hendriks
- Sarah Jones
- Danielle Kidd
- James McCormack
- EJ Shu
- Brett Smith
- Kent Wyllie

Regional Pathfinder Process Project Team (Regional Australia Institute)

- Dr Kim Houghton
- Steve Gleeson
- Geraldine How

Regional Pathfinder Leadership Forums 25 – 27 June)

- Doug Doherty
- Ros Herbert
- Robert Waterman
- Kirk Pinner
- Mike Brindley
- Danielle Kidd
- David Kenworthy
- Kent Wyllie
- Sarah Jones
- Warren Moore
- Nathan Kelly
- Craig Morris
- Malcolm Ryan
- Alex McKenzie
- Claire Smith
- Carolyn Watson-Paul
- Sally Milbourne
- Darren Smart
- Phil O'Keeffe
- Leigh Barker
- James Lantry
- Alana Seward
- Jim Wilson
- Rod Stendrup
- Anthony Brown

- Nick Probert
- Mel Blake
- Ashley Fenton
- Anthony Whitehead
- Adrian Drane

Regional Pathfinder Leadership Phone / Interviews / Roundtables (Various)

- Ross Lamplugh
- Lee Whiteley
- Jane Haley
- Stacey Sheehan
- John Perry
- Dr Amina Keygan
- Sandra Ayton
- Heidi Willard
- Robbie Walsh
- Shane Crawford
- Paul West
- Matt Atkins
- Duncan McFie
- Troy Brice
- Helen Thomas
- Jim Cooper
- Scott Riley
- Gerald Monson
- Sharon Holland
- Dirk Dowling
- Christine Gray
- Sid Sidebottom
- Brett Smith

Regional Futures Plan Cluster and Call to Action and Workshops (24 – 28 Sep / 1-2 Oct)

- Brett Smith
- Catherine Stark
- Clynton Jaffray
- Daryl Connelly
- Helen Thomas
- Ian Locke
- Kent Wyllie
- Mike Brindley
- Nani Clark
- Nicola Charles
- Rodney Greene
- Igor Van Gerwen
- Alicia Peardon

- Lindi Dornauf
- Craig Morris
- Adrian Drane
- Frank Pisano
- James McCormack
- Lesley Richardson
- Nick Probert
- Sonia Hodgetts
- Jeroen Rens
- Paul Davies
- Melanie Klieve
- Tom Lewis
- Megumi Matsumura
- Marc Watson-Paul
- Mike Badcock
- Robert Armstrong
- Dave Olden
- Claire Smith
- Anthony Brown
- Chelsea Bell
- Emily Smith
- Rod Stendrup
- Mel Blake
- Jillian Brandsema
- Brett Charlton
- Shane Crawford
- Di Edgerton
- Christopher Gwynne
- Sonia Hodgetts
- Quecha Horning
- Danielle Kidd
- Ross Lamplugh
- Ian Jones
- Kate Mirowski
- Paul Molnar
- Gerald Monson
- Prajit Parameswar
- Damian Peirce
- Daryl Quilliam
- Scott Riley
- Linda Seaborn
- Mark Shelton
- Mark Smith
- Sharon Yaxley

Regional Governance Workshop (30 Oct)

- Dr David Adams
- Jan Bonde
- Mike Brindley
- Rodney Greene
- Danielle Kidd
- James McCormack
- Craig Perkins
- Nick Probert
- Sid Sidebottom
- Tim Smith
- Sharon Yaxley