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INDUSTRY CONSULTATION REPORT EXPORT HUB ORANA & CENTRAL WEST REGION

PREPARED BY CLARE SYKES
DIRECTOR - LARKINSYKES PTY LTD

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Executive Summary

In April 2019, RDA Orana was successful in securing an Australian Governments’ SME Export Hub (Hub) grant for the NSW Orana and Central West Region, with the focus on METS (including manufacturing) innovations originating from the two regions. As the Hub develops over the duration of the grant timeframe, the intended outcome will be to foster the growth of participating SME’s, and leverage collective brands and infrastructure to increase participation in supply chains within and beyond the region.

A key milestone of the Export Hub project implementation plan is to develop a strategy, which will outline the key priorities for the Hub. Engagement with regional participants was identified as a key element to ensure a strong foundation for successful strategy development.

A series of three-hour industry / stakeholder consultation sessions were held during the 2019 Q4 calendar year at the regional centres of Cobar, Mudgee, Dubbo, Parkes, Orange, and Lightning Ridge

Additional 1:1 interviews were conducted with industry participants and stakeholders unable to attend the consultation in person.

This report outlines the objective and process of the consultation sessions and captures key insights. The findings are presented with the aim to inform future Hub strategy. The process challenged participants to explore the merits of regional positioning, and captured perceived strengths, weaknesses, threats and opportunities in the context of internal and external factors.

Participants explored a gap analysis on the current state, versus an aspirational future state of mining and METS opportunity within the region and were challenged to identify practical steps of “how could we get there”.

RDA Orana wish to thank the participating organisations that engaged and contributed to the industry consultation process, and dialogue remains ongoing with several parties to capture further insights and inform Hub strategy development.



Parkes Industry Consultation Session – October 2019

Introduction

In April 2019, RDA Orana was successful in securing an Australian Governments' SME Export Hub grant for the NSW Orana and Central West Region, with the focus on METS (including manufacturing) innovations originating from the two regions.

The intended outcome of the grant opportunity is to foster:

- greater **cooperation and collaboration** between participating SME's and others;
- growth of participating SME's through activities such as **developing collective brands and leveraging infrastructure** to support the **participation of their region in global supply chains**;
- improved **local capability to increase exports**, encourage growth, and create jobs.

The purpose of the Export Hub – Orana & Central West Region (the Export Hub / Hub) is to support the development of METS businesses across the region into exports, to improve sustainability, increase investment, connect businesses, and expose potential collaborations through hosting of events and training seminars.

A key milestone of the Export Hub project implementation is to develop a strategy which will outline the priorities for the Hub. Engagement of regional industry participants was identified as a key element to provide the foundations for the strategy development, and to enable to effective development and delivery of this element.

The purpose of the industry and stakeholder engagement and participation also seeks to inform, and foster relationship development, participation, and engagement in the Hub as it develops.

It is anticipated that effective stakeholder engagement and involvement of industry will improve industry understanding and participation, and optimise overall success of the Hub outcomes.

Background to Industry Consultation Plan

This Industry Consultation Report outlines the approach and considerations that were taken for the industry / stakeholder consultation sessions held at:

- Cobar – 2nd October 2019
- Mudgee – 15th October 2019
- Dubbo – 16th October 2019
- Parkes – 17th October 2019
- Orange – 18th October 2019
- Lightning Ridge – 3rd December 2019

Additional 1:1 interviews were conducted with industry participants and stakeholders unable to attend the consultation in person and information gathering to inform future strategy remains ongoing.

This document aims to:

- Consider the objectives and elements of the industry consultation sessions
- Outline the agenda and methodology to meet the industry consultation purpose
- Collate the feedback and findings of the consultation sessions
- Provide insights to inform future Hub strategy and optimise the Hub success

Outline of Industry Consultation Purpose

What is the industry consultation purpose?	<ul style="list-style-type: none"> The Export Hub will have a deeper understanding of the needs of industry to inform the Hub strategy and development
What are the industry consultation objectives?	<ul style="list-style-type: none"> To engage and activate industry to inform Hub strategy development and encourage future Hub participation
What is the Export Hub objectives?	<ul style="list-style-type: none"> The overall Export Hub objective is to establish an industry cluster, which will principally focus on the support to, and development/growth of METS&R industry participants with priority given to firms that have export goals.
What is the underlying need to engage with industry and stakeholders?	<ul style="list-style-type: none"> To optimise the success of the Export Hub To inform future strategy of the Hub and meet needs of industry To meet Department deliverables and milestones
What is the scope of the engagement?	<ul style="list-style-type: none"> To facilitate the successful delivery of the industry consultation sessions
What are the key identified risks of engagement?	<ul style="list-style-type: none"> Lack of industry participation Parallel and conflicting industry development activity or industry events
What are the identified benefits for the industry stakeholders?	<ul style="list-style-type: none"> An understanding of the Export Hub and Orana & Central West industry development initiatives The opportunity to engage and participate in a regional industry / cluster development activity The opportunity to inform and influence the Export Hub strategy
What engagement has already occurred?	<ul style="list-style-type: none"> Successful announcement and launch of Export Hub – Orana & Central West Region Formation of the Export Hub Advisory Group Select stakeholder interviews and industry engagement
What are the identified negotiable and non-negotiable elements?	<ul style="list-style-type: none"> Each industry consultation participant to contribute and participate in the three identified activities during the industry consultation That industry participants to have the opportunity to contribute to the consultations post events should they be unable to attend or have further contribution
What limitations will you need to consider, such as time, resources?	<ul style="list-style-type: none"> Time and date constraints of workshops
Will your project require more than one stage of engagement? Will you engage different stakeholders using different methods?	<ul style="list-style-type: none"> It is possible the project may require more than one stage of engagement. It is expected that follow-up interviews may be required. Depending on industry attendance at the consultation the method of delivery may shift to one-one interviews

Target Audience

Audience identification was undertaken to identify who to engage with, including consideration of the level of influence of the stakeholder or stakeholder group, and their capacity for engagement to the future initiative. The industry consultation process invited participation and input from RDA / Local Government / Chamber of Commerce, industry associations, as well as METS and Mining representatives applicable to the region

Inclusive participation

The industry consultation supported inclusive participation as a fundamental element of good stakeholder engagement and a priority for the project. The invitations were extended to high influence stakeholders but also encouraged and sought participation from stakeholders who may not be frequently heard or who may be harder to reach. The outreach process to identify and invite participation from relevant stakeholders was coordinated by RDA Orana.

Engagement history

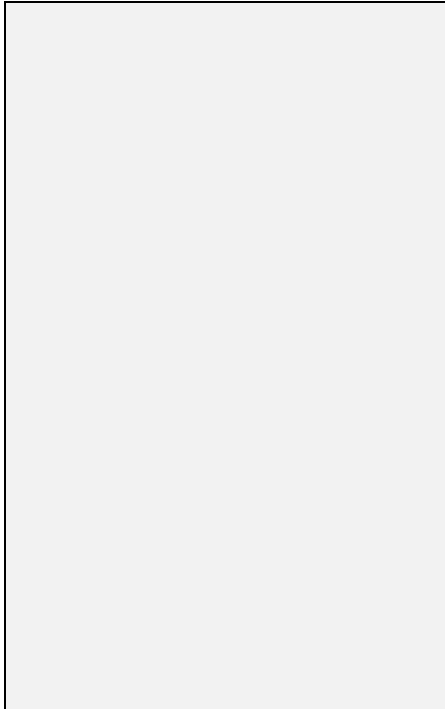
It was recognised that some industry participants and stakeholder groups may already have a history of engagement with RDA Orana or other government organisations. This history may impact the progress of the industry consultation project and how stakeholders may participate in future initiatives. A broad review of registered attendee lists was undertaken to understand the historical context that the project is entering into, and how it might change or reinforce existing relationships. An understanding of stakeholder history, needs and limitations was considered prior to the industry consultation sessions in each location.

Summary of Industry Consultation Plan

In the industry consultation planning process, a consultation plan was designed to address the engagement objectives and meet stakeholder needs and expectations. It was recognised that stakeholders may have differing capacities to participate in the consultation, and a tailored approach was utilised to encourage diversity in participants and optimise outcomes.

Project name	Export Hub – Orana & Central West - Industry Consultation
Project owner	RDA Orana
Project timeframe	<ul style="list-style-type: none"> • Cobar – 2nd October 2019 • Mudgee – 15th October 2019 • Dubbo – 16th October 2019 • Parkes – 17th October 2019 • Orange – 18th October 2019 • Lightning Ridge – 3rd December 2019
Inclusive engagement plan	<ul style="list-style-type: none"> • RDA Orana to coordinate and engage with relevant stakeholders including Local Council, Chambers and Networks prior to the industry consultations sessions to encourage attendance. • Both METS and Miners were considered relevant participants to the consultation sessions.

Engagement methods	<ul style="list-style-type: none"> • A 3-hour industry consultation / focus group, held over breakfast (excluding Lightning Ridge) • One-one one interviews to be held with important stakeholders who were unable to attend the industry consultation
Roles and responsibilities	<ul style="list-style-type: none"> • RDA Orana – identification and invitation to relevant stakeholders, event logistics and coordination of planning elements and capturing feedback / evaluation • Clare Sykes - LarkinSykes Pty Ltd – Facilitation / feedback / evaluation / reporting
Resources	<ul style="list-style-type: none"> • RDA Orana – Export Hub Project Manager / Coordinator / Promoter • LarkinSykes Pty Ltd - Facilitation
Feedback plan	<ul style="list-style-type: none"> • A feedback form was distributed and collected during the consultation session to each participant
Evaluation Plan	<ul style="list-style-type: none"> • A report prepared by LarkinSykes Pty Ltd and submitted to RDA Orana at the conclusion of the final industry consultation sessions and one-one interviews.
Engagement methods	<ul style="list-style-type: none"> • Focus Group • Collective Positioning Feedback • SWOT Analysis • GAP Analysis • One-one interviews
Potential risks and important history	<ul style="list-style-type: none"> • RDA Orana to provide input and information on history of industry stakeholders, or other considerations that might impact the successful delivery of the consultation process. • The industry consultation plan to identify and consider potential risks to ensure items can be addressed if necessary
Engagement channels / forums	<ul style="list-style-type: none"> • Engagement channel to be primarily via the Industry consultation focus groups with supporting one-one interviews for important industry stakeholders unable to attend the consultations session. • Feedback and evaluation will be considered that may prompt further interviews if necessary
Key messages	<ul style="list-style-type: none"> • That RDA Orana was successful in securing an Australian Governments' SME Export Hubs grant for the NSW Orana & Central West regions with the focus on METS (including manufacturing) innovations originating from the two regions. • That the purpose of the Export Hub is to support the development of METS businesses across the region into exports, to improve sustainability, increase investment, connect businesses, and



expose potential collaborations through hosting of events and training seminars throughout the Orana and Central West regions.

- That a key milestone of the Export Hub project implementation is to develop a strategy which will outline the priorities for the hub.
- That to ensure the success of the strategy development - engagement of industry participants has been identified as a key element.
- The Export Hub is committed to engaging with and learning from stakeholders through genuine dialogue.
- The additional purpose of the industry and stakeholder engagement and participation also seeks to inform, and foster relationship development and engagement to foster participation in the Hub as it develops.
- That effective stakeholder engagement will result in involvement of industry, which will in turn will improve industry understanding and participation, and optimise success of the Export Hub outcomes.



Cobar Industry Consultation October 2019

Overview of Risk Identification

As part of developing the Industry Consultation plan, risks associated with the engagement were identified, and mitigation strategies proposed. It was recognised that poorly planned or executed engagement could have a significant impact on the Export Hub outcomes and could negatively affect stakeholder relationships.

Description of Risk	Impact	Mitigation Action
<ul style="list-style-type: none"> Identified engagement and participation not achieved The purpose of the engagement is not well understood 	<ul style="list-style-type: none"> Difficult to leverage findings and participation Lack of engagement with Export Hub as it develops 	<ul style="list-style-type: none"> Commence planning and marketing activity early Conduct sounding interviews to activate engagement Leverage key contacts in regions (LC's / chambers etc.)
<ul style="list-style-type: none"> Industry expectations are not met Industry participants do not have enough time to participate 	<ul style="list-style-type: none"> The aims and objectives of the Export Hub and industry consultation sessions are not well understood Lack of engagement with Export Hub as it develops 	<ul style="list-style-type: none"> Feedback is recorded and actioned Keep to agenda timeframes during the consultation sessions to ensure key activities are completed The key messages of the Export Hub and industry consultation sessions are well articulated feedback is reviewed at each session to increase success of subsequent session
<ul style="list-style-type: none"> Industry participants are either "over consulted" or excluded from engagement 	<ul style="list-style-type: none"> Lack of engagement with Export Hub as it develops The industry consultation fails to take account of the history or previous relationships with stakeholders. 	<ul style="list-style-type: none"> Ensure stakeholder mapping is undertaken prior to marketing efforts, and an understanding of the history and local context is considered. Activity recorded and actioned Communication between RDA Orana and LarkinSykes to ensure local context is understood
<ul style="list-style-type: none"> Industry participants believe the engagement is tokenistic or shallow 	<ul style="list-style-type: none"> Lack of engagement with Export Hub as it develops 	<ul style="list-style-type: none"> Ensure that the messages of the Export Hub related to purpose and objective are communicated during the Industry Consultation Activity recorded and actioned Local context and sensitivities are communicated between RDA Orana and LarkinSykes

Industry Consultation Feedback and Evaluation

At the completion of each industry consultation sessions the facilitator provided feedback to the stakeholders about how their input and feedback has been used. It was assumed that feedback on the stakeholder engagement process and report mechanism will ensure that stakeholders feel that their contributions have made a difference to the outcome of the Export Hub project. This will turn encourage stakeholders to participate in the future.

Feedback from Stakeholders was captured via a feedback form completed by participants at the conclusion of the industry consultation sessions.

Stakeholders will also be communicated the delivery of the final Hub Strategy to see how the information gathered from the engagement process has been disseminated and used.

The following key questions were reviewed between RDA Orana and LarkinSykes at the conclusion of each industry consultation session:

- What worked well? What was learnt?
- To what extent did the industry consultation process meet the Export Hub engagement objectives?
- To what extent did the industry consultation process contribute to the overall Export Hub project objectives?
- To what extent was the engagement process responsive to diverse communities and community sensitivities?
- Were there any unexpected challenges? What could be done differently?
- Did it deliver the outcomes sought for participants? Were the participants satisfied and is it likely they will engage with the Export Hub in the future?
- Is there any specific follow-up with participants?

How will the Information be Shared

The learnings from the industry consultation sessions will be shared with Export Hub Advisory Committee and Department. The final Hub Strategy Report will be shared on the Export Hub website and distributed to the consultation participants and wider Hub network.

Export Hub – Orana & Central West – Industry Consultation Agenda Outline

06:45 – 07:15	Arrival – Tea/Coffee Breakfast
07:15 – 07:30	<p>Welcome from the Export Hub – Orana & Central West Region – Overview of Hub / timeframe / objectives</p> <ul style="list-style-type: none"> • Andrew Foley - Export Project Manager, RDA Orana
07:30 – 08:00	<p>Why the Export Hub - Clare Sykes – Director Larkin Sykes Pty Ltd</p> <ul style="list-style-type: none"> • Overview of Australian Mining and METS • What are the METS industry drivers and trends – Australia and international perspective • What is cluster development • Developing a cluster development strategy to attract world class investment and expertise, boost reputation, and drive industry and export growth • Case Study of a successful Mining and METS Cluster
8:00 – 9:30	<p>Targeted Stakeholder Engagement and Input</p> <ul style="list-style-type: none"> • Collective Positioning – Why Orana & Central West • Building a successful cluster – SWOT Analysis - Strengths / Weaknesses / Opportunities / Threats • Mind the Gap – Moving from the NOW to a preferred FUTURE <ul style="list-style-type: none"> - Collaboration and connections - Knowledge and expertise - Industry and export growth
09:30 – 10:00	Closing Discussion – Q&A, where and how to engage, network



About the Export Hub – Incorporating the Orana and Central West



In April 2019 the Commonwealth Government granted funds to RDA Orana to establish an Orana Export Hub under the Small and Medium Enterprise (SME) Export Hubs program. This exciting new initiative is being crafted to support industry and business development in the METS sector for the Orana and Central West regions.

The aim of the project is to support the development of businesses across the region into exports, which will improve sustainability, increase investment, connect businesses, and expose potential collaborations through the hosting of events and training seminars throughout the Orana and Central West regions.

About the Speakers and Facilitator

	<p>Andrew Foley - Export Project Manager - RDA Orana</p> <p>Andrew has spent most of his career in the automotive industry where he worked with Dealerships, Importers/Exporters, Manufacturers and Wholesalers in many key and important high-volume automotive markets of the world.</p> <p>His 40+ years experience and tenures have given him a deep understanding of the international Automotive industry and manufacturing supply chains. Over the past 15 years he has been working with the international supply lines of Automotive spare parts and vehicle sales and other industrial equipment for supply to the Americas (USA, Canada, Mexico, Central and South America and the Caribbean), the Middle East, the African Continent and Central Asia regions.</p> <p>This statement sounds simple enough but in reality, these markets represent extremely diverse demographics in culture, population wealth, National GDP variations and Automotive brands and vehicle usage. The planning processes are detailed and require a high level of accuracy as everything happens in slow motion and, with monetary values in the many millions of US Dollars problem avoidance is far easier to deal with than working to resolve issues.</p>
	<p>Clare Sykes – Director - Larkin Sykes Pty Ltd</p> <p>Clare is a Mining Engineer with a background in resources and associated industries, Clare has worked at both operational and executive levels across both public and private sectors for over 25 years. Clare provides consultative services on strategy and organisational development, business development as well as advice on international engagement and the strategic application of mining innovation for the resources sector.</p> <p>Prior to this Clare served as General Manager International Markets with METS Ignited, an initiative of the Federal Government’s Growth Centre that is tasked with advancing the competitive positioning of the Australia’s \$90b Mining Equipment, Technology and Services (METS) sector. Prior to her role at METS Ignited, Clare also worked with the NSW Department of Industry where she assisted businesses within the resources sector collaborate with major industry partners to drive investment and innovation across the NSW METS sector.</p> <p>Clare has held a variety of roles throughout her career including Director Supply Chain and Logistics for Southcorp Wines/Fosters Group where she was based in the USA, and Transactional Corporate Finance with JP Morgan Resources Team. Clare has also worked in engineering roles in mining operations in central Queensland and the Hunter Region.</p> <p>Along with a Bachelor of Engineering (Mining - Hons 1) from the University of NSW and a Graduate Diploma of Applied Finance and Investment from the Securities Institute of Australia, Clare has also completed the Advanced Leadership Program with Women and Leadership Australia. Her work within the mining industry early in her career was recognised in 1998 where she was awarded the Peter Mitchell Churchill Fellowship to investigate ways to advance the participation of women in heavy and mining industries.</p> <p>Clare serves on the Board of the Newcastle Institute of Energy and Resources (NIER), the Federal Government Global Linkages Program, DFAT - Export Services Working Group, the O2N Export Hub Advisory Committee, and is the current Chair of METS NSW an initiative of the NSW Department of Industry.</p>

Export Hub – Orana & Central West - Industry Consultation: Findings

Collective Positioning

During the industry consultation it was discussed and agreed that globally the Australian METS sector and brand is recognised and respected as a hallmark of innovation and quality products and service. This aspect of the industry consultation explored the consensus and differentiating factors of a regional branding position for mining and METS for the Orana and Central West Regions. The discussion explored whether there is a particular set of mining and METS brand values that firms and advocate groups in the region could endorse, and could be supported in future market and narrative development.

There was a general agreement between participants that METS companies also understood the power of representing themselves under an umbrella brand via a structured network, and examples were used such as Austmine, Hunternet and i3Net.

The groups were challenged to think of words or phrases that they felt represented the wider Australian METS Sector. Participants then highlighted the words that best reflects the sector within the context of Orana and Central West Region. The most common words identified for Australian mining and METS are represented below, with shaded cells deemed to best reflect the perspective of the region.



Collective Positioning Exercise - Mudgee October 2019

Collective Positioning – What are we?

Cobar Consultation	Mudgee Consultation	Dubbo Consultation	Parkes Consultation	Orange Consultation	Lightning Ridge Consultation
Leaders	Innovative	Large Scale / Strong	High Quality	Highly Skilled / offers career opportunity	Opportunistic
Solution Providers	Environmentally conscious	Historic / resource rich	Wealthy sector	Well known / resource rich	Employment
Safe	Resource Rich	Sustainable / responsible	Drought Saviour	Remote	Controversial
Hardworking	Skill shortage	Cutting edge	Quality	Environmentally challenged	A fair go for everyone
A community	Export of raw products	Efficient	Innovation	High Safety Standards	World leaders in black opal
Volatile	Specialised	Skilled Solutions driven	Growth Industry	Misunderstood / evolving	Innovative
Worlds-best	High Quality	High quality	Job Opportunities	Not a manufacturing region	FIFO / Transient
Innovative	Competitive	World class	Economic Growth	Collaborative	Isolated
Specialised	Long term	Large employers	Transport and Logistics	Adaptable	Dominated by major companies
High Industry Standard	Reliable	Competitive	Family strain	Water sensitive	
Environmentally Responsible	Valuable		Transient Workforce		

The groups were then challenged to think of words or phrases that they felt did NOT represent the Australian METS Sector. The words were then ranked in the context of the Orana & Central West region. The most common words are represented below, with shaded cells considering the regional context:

Collective Positioning – What are we not?

Cobar Consultation	Mudgee Consultation	Dubbo Consultation	Parkes Consultation	Orange Consultation	Lightning Ridge Consultation
United	Collaborative	United & working as a group	Not sustainable	Great external communicators	Well Promoted
Collaborative	Well connected	Supported	Collaborative	Winning the PR battle	United
Corrupt	Boom and bust proof	Recognised	Promoted	Cohesive and unified	Value Adding
Risk takers	Resource friendly	Collaborative	Not well known outside the industry	Outwardly focused	Values Based
Not unified between coal and metal	Well known to smaller company	Environmentally friendly	Engaged with the community	Known internationally	Well Supported
Under regulated	Corrupt	Value adders	Well researched	Marketed well	Informed
Focused	Well connected	Boom and bust proof	Well positioned or promoted	Silent	Sharing the Wealth
Attractive	Risk adverse	Loved	Local loyalty	Positive about the benefits	Appreciated
Big picture	Unsafe for employees	Near world markets		Collaborative	
Proactive				Recognised outside the industry	

Collective Positioning – Key Findings

Positioning Mining and METS in Orana & Central West – in the context of a national Mining and METS brand

Globally the Australian mining and METS brand is recognised and respected as world class, and a hallmark of innovation and quality products and services. It is suggested that significant benefit can be gained if a unique business offering can be underpinned by a recognised attribute and brand promise. METS companies also understand the power of representing themselves under an umbrella brand. (METS Ignited, SCP 2015)

For the mining and METS sector in the NSW Orana & Central West region, a brand value proposition in the context of an aligned national brand can assist in building a positive reputation and can be a useful tool to seek opportunity in a unified way.

The brand values observations create the proposition based on the industry consultations and may provide guidance in the construction of an effective brand narrative specific to METS&R in the Orana & Central West regions.

Brand Value 1: NSW or Orana and Central West Mineral Province - Innovative, solutions driven, historic, resource rich, diversified

***Proposition:** Communicating innovation and focussed solutions from a historic resource rich region to provide significant value in the risk-averse resources sector.*

Brand Value 2: Orana and Central West METS Industry - Expert, specialised, resilient, supported.

***Proposition:** Position the region and its industry participants as authorities for developing technical mining solutions and solving mine site challenges in an innovative, diversified community, and commodity base. Leverage the position to assist in building reputation and gaining attention from key stakeholders.*

SWOT Analysis Mining and METS (Orana & Central West)

A SWOT analysis was selected for the industry consultation as it is a familiar and well-established tool for documenting internal strengths and weaknesses in the identified industry / region, as well as external opportunities and threats.

The information gathered from these discussions will be used in the O2N strategy development to help map and achieve the goals of the project, and from the outset identify the key strengths, weaknesses, opportunities and threats facing the development of the O2N Export Hub.

SWOT Analysis: Strengths

Participants were asked to identify regional mining and METS strengths, in particular:

- What do Mining and METS in the Orana & Central West region do well?
- What specific advantages does the region have?
- What are the resources and assets?
- What do others acknowledge as strengths of the region?

Cobar Consultation	Mudgee Consultation	Dubbo Consultation	Parkes Consultation	Orange Consultation	Lightning Ridge Consultation
Historic mining region. Strong sense of identity	Mudgee hosts diversified employment in the region	There exists strong IT infrastructure, and availability to services.	Parkes is recognised as a Hub in its own right, with activity in inland logistics and NSW activation precincts	Locality to the wider region and mining operations	The region is recognised and well known
The Cobar region has long-term exploration prospects	The region holds close proximity to logistics, transport and services	A strong transport Hub (inland rail)	There exists strong local skills and knowledge in mining	Proximity to major cities – logistics advantage – (e.g. inland rail / western Sydney)	Vast areas that are under explored
There exists specialised expertise in underground metalliferous mining	Host to infrastructure assets, and identified as an attractive regional lifestyle	The region is well endowed with natural resources, is highly prospective, and diversified commodity base.	A sense of community and supporting infrastructure, lifestyle, facilities, schooling, and air transport.	Not a FIFO Community	Unique product offering and vertically integrated industry

Cobar Consultation	Mudgee Consultation	Dubbo Consultation	Parkes Consultation	Orange Consultation	Lightning Ridge Consultation
There exists collaboration between operations in health and safety, training, and technical elements, and active initiatives are underway	The region is home to well established mining operations with long mine life	Major players are represented in the mining sector in the Dubbo (and wider) region.	Geographically is the centre of the mining triangle in NSW	Strong health services, education, and supporting infrastructure	Small scale – owner operated mines. World leaders in small scale mining
The region is a hub for OEMs	Large scale mines operated by significant companies	The region is an attractive area to live in, and there is community acceptance for mining	Supporting professional services base	Resource rich – there exists a natural cluster of opportunities, diverse commodity base, long term prospects	No social or economic entry barriers – open for opportunity
Strong local identity in mining (not a FIFO town)	The operations host advanced technology within large-scale mining operations	There is a large Federal Footprint (electorate). Stable government	Diversified industry groups (eg. Energy / agriculture)	Attractive cost of business, and lifestyle	Culturally diverse and self-reliant
The region is host to technically challenging operations . It attracts professional with specific expertise and interest.		High level of investment in future projects across the region		Outstanding local business success stories in METS & R	Well connected to other gem fields / regions

SWOT Analysis: Weakness

Participants were asked to identify regional mining and METS weaknesses, in particular:

- What could be done better?
- Where are the risks?

Cobar Consultation	Mudgee Consultation	Dubbo Consultation	Parkes Consultation	Orange Consultation	Lightning Ridge Consultation
Lack of Community Services in the region for Mining and METS business growth	Negative community perceptions of coal and mining	It is difficult to attract skilled labour	The competition between regional LGA's. A lack of coordinated vision	Proximity to the coast (exports)	Lack of new entrants
The mining region is remote	The negative impact of contentious approvals (eg. Bylong)	Dis-engaged with State Government	Lack of connection between other mining centres in the region	Uncertain water security	Not united – somewhat fragmented
Lack of transport infrastructure	Limited trust in the regulatory process – impact to economic stability of the industry in the region	Variation in local policies and agenda's (LGA's)	Not viewed by the public and community as a "resources" region	Cost of power / energy	Over regulated
Shortage of Skilled workers	Perceived lack of transparency in the region	Scarcity in water resources, and cost of energy	Knowledge is not promoted. Continues to be a rural reliant economy	Lack of understanding in the skills gaps / and future skill requirements	Lack of supporting industries
Infrastructure risks – including water and power	Drought impacts	Environmental impacts (in particular drought)	Support services for industry outside of tourism is lacking.	Lack of skilled labour in METS due to wage disparity with the mine employers	Aging miners and skill-set

Cobar Consultation	Mudgee Consultation	Dubbo Consultation	Parkes Consultation	Orange Consultation	Lightning Ridge Consultation
Lack of connectivity and collaboration between other mining centres in the region	Cost of living in Mudgee and surrounds.	Universities in the region do not have a focus on mining	Lack of TAFE / vocational training linked to resource sector needs	Lack of mining / METS identity in the region. Public perception of mining	Diminishing opportunity
Limited voice with State regulators		TAFE and other vocation links to industry are weakening	Lack of quality housing	Negative community engagement in mining / METS. Conflict with lifestyle residents toward mining, exploration and development.	As an industry – it has not “evolved”
		There is lack of collaboration between mining companies in the region.	Disconnect in state-based funding toward mining	Competition between other centres in the wider region	
		Inter-regional isolation between the mining centres. Lack of “whole of region” industry efforts.		Length of time for project development	

SWOT Analysis: Opportunity

Participants were asked to identify mining and METS opportunities that could be applied to the region, in particular:

- What is known but have not been able to try?
Are there any new frontiers that could be explored?

Cobar Consultation	Mudgee Consultation	Dubbo Consultation	Parkes Consultation	Orange Consultation	Lightning Ridge Consultation
<p>Advanced exploration prospects – deep exploration drilling.</p> <p>Foster Drilling Certifications in the region</p>	<p>Leverage the known engineering expertise and resources of the region</p>	<p>Establish a whole of region network to link regions and businesses and foster collaboration</p>	<p>Develop an entrepreneur hub to foster an innovative ecosystem in the region</p>	<p>Create stronger links between the mining sector and education and training sectors.</p> <p>Understand where the demand for skills lies and match to regional capabilities.</p>	<p>Small scale mining expertise and education prospects</p>
<p>Establish a mining school to foster expertise aligned to the technically challenging operations and accelerate technical innovation</p>	<p>Continue to advocate for improved access to major regional centres and Sydney</p>	<p>Recognise and create specific centres of excellence linked to the future of mining (eg. Arid mining, block caving, Health and safety, environmental management, tailings</p>	<p>Create a whole of region focus on best practice activities in mining to attract research and incoming visitors. (Eg automation technologies and mining practice at North Parkes)</p>	<p>Leverage branding opportunity to promote the benefits of mining, and promote as a sector of choice (including diversity and flexible work opportunities)</p>	<p>The opal Centre and the opal stones of high value.</p> <p>Localised media opportunities.</p>
<p>Accelerate new operations coming online in the region – increase the number of attractive project pipeline</p>	<p>Boost expertise in coal mining technologies – open cut and underground</p>	<p>Leverage the IT infrastructure to foster and advance capabilities in digital technologies and automation in mining</p>	<p>Attract skills to the region in response to shortages created by Inland transport and logistics corridor.</p>	<p>Better integrate energy management with the mining sector</p>	<p>The Centre of Excellence of Opals is already in this region</p>

Cobar Consultation	Mudgee Consultation	Dubbo Consultation	Parkes Consultation	Orange Consultation	Lightning Ridge Consultation
Foster education initiatives from primary levels to a technical / apprentice program to retain youth in the region and build on the strong sense mining identity in the community	Leveraging and link the diversified nature of the region – mines / wines / agriculture	Drive collaboration between sectors that are well recognised in the community (eg. Energy, Ag Tech, Water, Mining)	Create specific priority areas to in exploration technologies, and advanced materials	Foster innovation in mineral processing, water, exploration, and remediation technologies	A shared vision on the beneficial re-use of opal industry products, eg. Fossils, and Tourism – circular economy elements
Foster the “brand Cobar” to promote the local regional strengths (eg. Local buying program and enhance existing events)	Explore opportunities in advanced water technologies – to benefit both agriculture and mining	Better understand and promote mining industry challenges and needs, and align business programs to support industry demands	Respond to current drought conditions to promote Innovation in water technologies	Block caving and specific mining techniques – emphasise the strength of the region	The region is host to numerous unique solutions and specialised and bespoke equipment related to small scale mining

SWOT Analysis: Threats

Participants were asked to identify external threats to the mining and METS opportunities that could impact outcomes, namely:

- Are any weaknesses likely to make us vulnerable?
- What outside issues beyond our control or within, that could block our progress?
- Are other like organizations / regions doing anything different?
- Are there any big changes in our demographics?

Cobar Consultation	Mudgee Consultation	Dubbo Consultation	Parkes Consultation	Orange Consultation	Lightning Ridge Consultation
The decline of skilled workers to other regions	Social Licence to operate	The availability and cost of energy	Ongoing export of raw materials without developing downstream value add process	Loss of skills to FIFO / WA, resulting in a transient workforce Lack of soft skills / problem solving / communication	Over-regulation, lack of access to new ground and re-tape
Commodity price impacts	The community perception of mining	Water and climate impacts	Ongoing drought, water shortage and competing demands	Social media influences (from outside the region)	Commodity price fluctuations
Energy constraints and water shortages	A skills shortage, and retaining employees in the region (wage disparity with Qld)	Uncertainty in investment in major projects in the region, especially those in strategic minerals	The tension between agriculture and mining and community perception. Social licence considerations	The focus of the region on tourism as opposed to mining	Reduction in “real miners” vs “players”
A lack of professionals joining the industry	Region is known for agriculture heritage, not mining	Lack of skilled workforce pipeline in both university and vocational skills	Balancing skills demand between agriculture / infrastructure and mining	Lack of ability to sell and promote a “good news story” relating to mining	Cannot predict or guarantee supply, irregular markets projections
Changing regulation and inability to respond to new legislation	Long term job security including mature age workers	The ongoing stigma and negative perception of mining	An over-reliance on mining – complacency to develop supporting industries	Reliant on big company investment to drive future jobs growth	Exploration is unpredictable
Physical infrastructure / accommodation to support growth			Lack of control of geo-political impacts and investment decision in mining	New reality of climate variability and drought and the impacts to the sector.	The industry requires specialised knowledge
			Inability to meet skill and talent requirements for the industry	Regulatory impacts – will NSW be competitive for mining in the future?	Media creates a unrealistic viewpoint and mis-represents the industry (eg. Opal Hunters)

Moving from the NOW to a preferred FUTURE

The industry consultation then explored a gap analysis on the current state versus aspirational future state of mining and METS opportunity within the region by asking the questions:

- Where are we now?
- Where do we want to be?
- How could we get there?

The aim of the gap analysis was to provide important insights into specific aspects that could be improved or addressed to enable aspirational industry development objectives for the Export Hub. The gap analysis addressed three core themes with feedback as follows:

Collaboration and Connections

Cobar Consultation	Mudgee Consultation	Dubbo Consultation	Parkes Consultation	Orange Consultation	Lightning Ridge Consultation
As a strong mining region – there should be a significant conference / trade event (eg. Diggers and Dealers)	Consensus that METS and mining in the region is not connected	Collaborations are currently informal, there is opportunity to create a more formalised network for the industry	The region is currently disconnected between METS, Miners and Research	Develop stronger connection and collaboration between regional mining centres – eg. Parkes / Cobar	In general well connected between opal regions, but lack lobbying capacity
Promote Mine Open Days	There is opportunity to better coordinate tenders and procurement services to the region	There is opportunity for a more coordinated approach to enhance local buying programs	There is opportunity to connect research to industry , in particular to advance future mining technologies	Create a shared vision for leveraging the collaboration expanding beyond METS industries to including State Government priorities	Lack of TAFE capacity and funding for key value adding industries

Cobar Consultation	Mudgee Consultation	Dubbo Consultation	Parkes Consultation	Orange Consultation	Lightning Ridge Consultation
Promote positive media related to mining	A greater opportunity to connect with the mining industry outside the immediate region	Create greater visibility to tenders and procurement opportunity	The region could be better positioned with targeted points of excellence emphasised	Create Field Days to promote and connect operations, and connect to the public	Strong industry association, industry is globally recognised
Create a database of businesses in the region	The industry would benefit from greater connections and collaboration between hard rock and coal	There is a need for dedicated resources in the region to advance collaboration and connect business / government / industry / research	The need to stronger networking opportunities There is opportunity to collaborate across the region on a shared program and vision	Strengthen and expand industry groups and existing collaborations (eg. MEET, ORVA, Central West Geologists)	Unclear on access and navigation of government grants and assistance
Mines to promote specific technical challenges to attract operating solutions and business into the region.	The region would benefit from an industry network and more coordinated communication.	The need for a locally identified network linked to key stakeholders (including national stakeholders like Austmine)	The region could host a significant conference or symposium (eg, the Inland Rail Symposium) with linkages to mining and METS		Collaboration to aligned industries is strong in specific areas of safety (eg Coal) but regular dialogue has declined
			The opportunity in increase international visits and exchange including incoming delegations		

Knowledge and Expertise, Skills

Cobar Consultation	Mudgee Consultation	Dubbo Consultation	Parkes Consultation	Orange Consultation	Lightning Ridge Consultation
Be recognised as a world class region for geotech and ventilation	Find opportunities to attract and connect universities to the region	Target industry aligned skills development	Target skills development linked to mining needs	Be known as the centre for mining and METS expertise	Opportunity for indigenous employment to be showcased and presented
Be recognised for difficult hard rock / unique ground structure mining expertise	Centre of excellence in advance coal mining practice	Address the impact of FIFO for specialist skills, and availability of subject matter expertise	A Centre of Excellence (CoE) to advance industry and research in specific mining areas	Drive to deliver the skills to meet future demands from local population	New fields to be developed to provide sustained industry
A centre for mining training and certifications	Increase support for vocation and TAFE training	Create a virtual platform / network to boost awareness of specialised skills and expertise	Promote the champions of knowledge and expertise in the region. Who are they and how can they be leveraged?	Boost media presence for mining and METS in the region – including positive stories / case studies	Attract trades and skills development to retain young people
A mining school to develop expertise and innovation in geotech, ventilation, heat/rock stress	Attract foreign students to the region	Mining companies in the region could work together to align and capture their future skills needs	There is the opportunity to drive a mining cluster but needs coordination to ensure all parties share and execute the vision.	Create linkages to other industries that will create a pipeline of skills for future mining needs	Take advantage of the diversified skill set in the region
	Focus on retention strategies to keep expertise in the region	Enhance training and testing of equipment to accelerate the innovation cycle			Business education – promote opportunity for value add industries and digital marketplace

Cobar Consultation	Mudgee Consultation	Dubbo Consultation	Parkes Consultation	Orange Consultation	Lightning Ridge Consultation
		Mining education linked to the region (eg. Link key mining schools for hands-on training)			Innovative solutions could be diversified into agriculture and larger scale mining
		Standardise mine-site inductions across the region			Be a test-bed for innovative products and solutions
		A local business "mining ready" program.			



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Support for Industry growth beyond the region – Domestic and International

Cobar Consultation	Mudgee Consultation	Dubbo Consultation	Parkes Consultation	Orange Consultation	Lightning Ridge Consultation
Strengthened business support / understand access to information on grants and govt support	It is unclear where to get export support	There is a lack of understanding of where to get export support. No centralised portal	There is a lack of understanding of what the export opportunities are	There lacks a clear understanding of where to go for support on export growth / grants	Growth in digital marketplace for opal auctions and a demand driven marketplace
Strengthened linkages to peak bodies focused on export growth (eg. Austmine)	Provide a centralised repository of services	Align government support and programs to be more relevant to local firms	The types of programs to support exports are confusing lack coordination	Create a “one stop stop” for services and support	Re-positioning of opal market demographics and branding
A dedicated resource to support export growth of business in the region	Develop coaching and facilitation support specifically targeted to export development	There are too many service providers in the space, and confusing for firms to understand opportunities and support.	There is opportunity for a central repository of services and support	Develop a MOU / alliance between key targeted stakeholders to ensure a shared vision is delivered for the region	More coordination and support in access to new markets
Promotion of the region via existing events (eg. Festival of the mining ghost)	Increase innovation pilots hosted at operations in the region	A need for a coordinating platform to provide links to support – but also profile the region internationally	There is lack of understanding of mining companies challenges and procurement needs. This could be more centrally coordinated to promote local opportunities	Define a process flow of industry support stakeholders to provide clarity to participants accessing programs.	A centralised place to commence export including knowledge on grants

Cobar Consultation	Mudgee Consultation	Dubbo Consultation	Parkes Consultation	Orange Consultation	Lightning Ridge Consultation
Accelerated pathways to certifications / education		The opportunity for a regional showcase to boost awareness of expertise and business in the region and provide trade opportunities.			Coordination of incoming and outgoing delegations and missions. Promotion of the region in international markets
A focus on finding solutions in water and energy that are applicable beyond the region					An increased use of technology to promote and export products

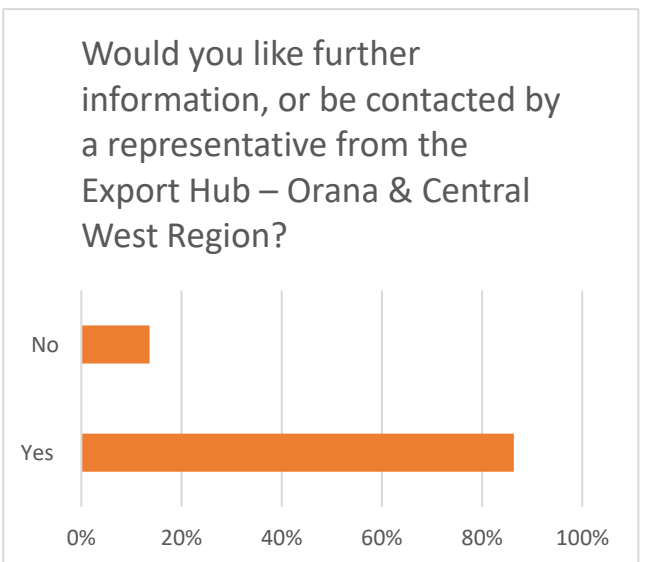
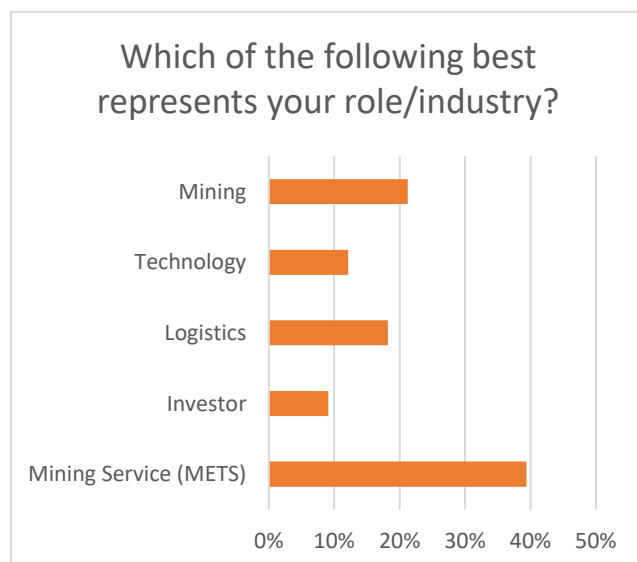
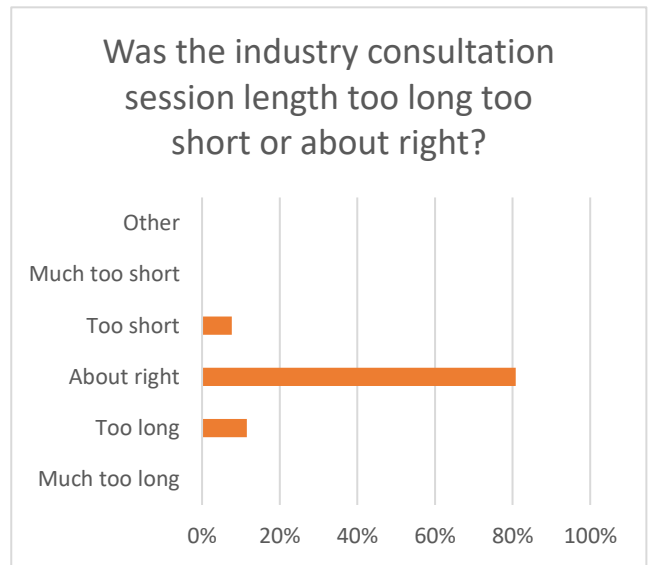
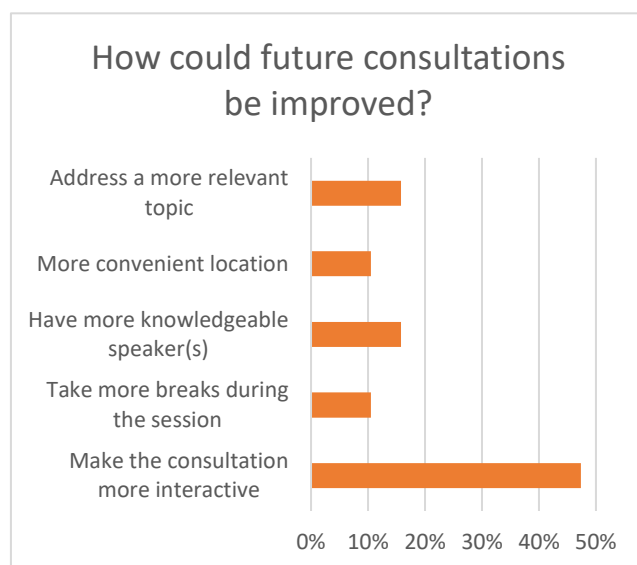
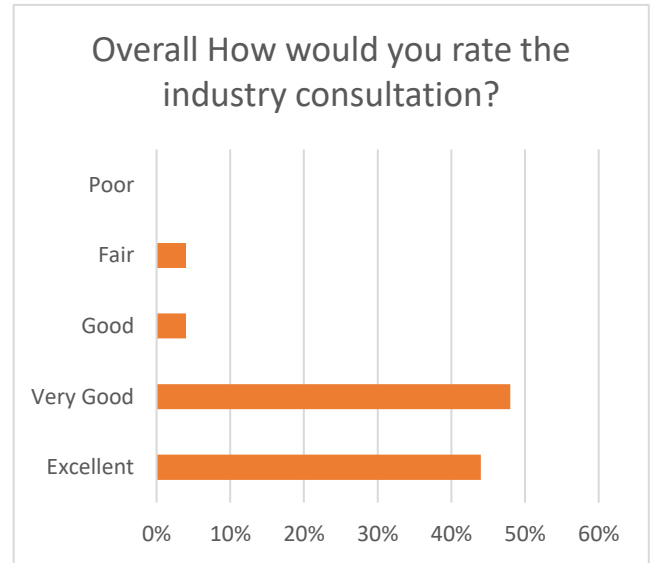
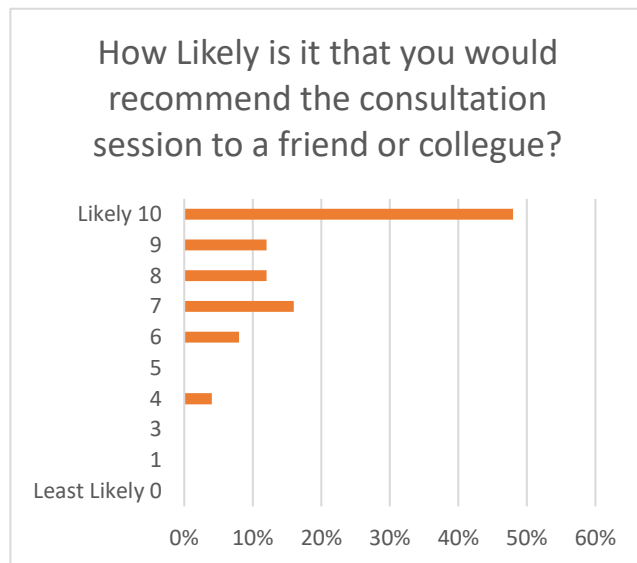
Closing Points

At the conclusion of each session the industry consultation moved to a discussion on:

- Where to find more information
- How to engage
- How will the results be disseminated and when results will be viewed and shared.

This provided the opportunity for the primary point of contact to be emphasised and opened the dialogue for further engagement. Feedback forms were also completed at this point.

Appendix A: Export Hub – Orana & Central West - Industry Consultation: Results of Feedback and Evaluation Forms



Appendix B: One – One Interview Guide: Export Hub – Orana & Central West - Industry Consultation

Name of interviewee / Company / Organisation:.....

Date / Time:.....

Background:

- In April 2019 the Commonwealth Government granted funds to RDA Orana to establish an Orana Export Hub under the Small and Medium Enterprise (SME) Export Hubs program.
- This exciting new initiative is being crafted to support industry and business development in the METS sector for the Orana and Central West regions.
- The aim of the project is to support the development of businesses across the region into exports, which will improve sustainability, increase investment, connect businesses, and expose potential collaborations through the hosting of events and training seminars throughout the Orana and Central West regions.
- A key milestone of the Export Hub project implementation is to develop a strategy which will outline the priorities for the Hub.
- Engagement of industry participants has been identified as a key element to lay the foundations for the strategy development and to enable to effective development and delivery of this element.
- The purpose of the industry and stakeholder engagement and participation also seeks to inform, and foster relationship development and engagement to foster participation in the Hub as it develops.
- This Industry Consultation have been held at Cobar, Mudgee, Dubbo, Parkes, Orange – and the reason for the 1-1 interview is to capture any gaps in attendance / and ensure a broad consultation has taken place to best inform the strategy.
- The learnings from the industry consultation sessions and 1-1 interviews will be shared with Export Hub Advisory Committee. It is anticipated that the final industry consultation report will be shared on the Export Hub website and to the participants.

Question 1 - Collective Positioning

- Globally the Australian METS sector and brand is recognised and respected as a hallmark of innovation and quality products and service.
- METS companies also understand the power of representing themselves under an umbrella brand. (examples Austrade / Austmine / Hunternet)
- The export hub strategy will work toward
 - Better understand the points of leverage within the context of a national brand
 - Assess the merit of a regional based brand campaign or initiative
 - What it is that the region (Orana & Central West) values in the sector beyond the skills / research, products and services
 - Determine elements of consideration toward positioning the region as the “go-to-place” and the “place-to-be” for Mining & METS (or aspects of).

Question: When you think about Mining and METS companies in the context of the Orana & Central West region – what are some words that would best represent? – **“What are we?”**

- *Examples: Credible, trustworthy, reliable, solutions focused, specialised, high quality, Committed, long-term, valued partner.*

Question: When you think about Mining and METS companies in the context of the Orana & Central West region – what are some words that would best represent? - **What are we not?**

- *Examples: untrustworthy, corrupt, connected, collaborative*

Question: In your opinion do you think there exists any other unique qualities that represent the Mining and METS sector in the context of the Orana & Central West region that is different to the broader Australian sector?

Question 2 – Mining and METS (Orana & Central West) - SWOT

A SWOT analysis is a well-established tool for documenting internal strengths and weaknesses in the identified industry / region, as well as external opportunities and threats.

This information was used in the industry consultations to help map and achieve the goals of the project and from the outset identify the key strengths, weaknesses, opportunities and threats facing the development of the Hub.

Internal Factors - Strengths:

- What do Mining and METS in the Orana & Central West region do well?
- What specific advantages do we have?
- What are our resources and assets?
- What do others acknowledge as strengths of our region?

Internal Factors - Weaknesses:

- What could we do better?
- Where are we at risk?

External Factors - Opportunities:

- What do we know about but have not been able to try?
- Are there any new frontiers that we can explore?

External Factors - Threats:

- Are any of our weaknesses likely to make us vulnerable?
- What outside issues beyond our control or within that could block our progress?
- Are other like organizations / regions doing anything different?
- Are there any big changes in our demographics?

Question 3 - Moving from the NOW to a preferred FUTURE

The consultations have undertaken a gap analysis to inform the Export Hub Strategy on the current state versus aspirational future state.

The results of the gap analysis will provide important insights into aspects that could be improved or addressed to enable aspirational industry development objectives for the O2N Export Hub.

For each of the following categories could you provide your personal insight on:

Collaboration and Connections

- Where are we now?
- Where do we want to be?
- How could we get there?

Knowledge and Expertise, skills

- Where are we now?
- Where do we want to be?
- How could we get there?

Support for Industry growth beyond the region – Domestic and International

- Where are we now?
- Where do we want to be?
- How could we get there?

Appendix C: Acknowledgment of participants and contributors

RDA Orana wish to thanks the following organisations that engaged and contributed to the industry consultation process. Dialogue remains ongoing with several parties to capture further insights.

Airlink Regional Airlines	Horts Engineering
Alkane Resources Ltd	ICN
AMGC	JBC Australia (Wideland Group)
Austen Brown Legal	Kookaburra Caravans Dubbo
Austmine	MASS Group Regional Quarries
Bowdens Silver mine	MBD Recruitment
Burmac Dubbo	Migrant Business Owner
Chair of RDA Central West	Mining Camps Australia
Clean Teq	Mudgee Cranes
Coates Hire Orana & Central West	Native Secrets
Coleman Equipment Orange	NSW Business Chamber Orange
Copper City Tyres	Pickles Auctions
CSA Cobar Glencore	Pybar Mining Services
DTC Training	Ray White Real Estate
Earth Eorx	Rebecca McKenzie Walgett
EMS Group Pty Ltd	Spinifex Recruitment
Emu Logic	Stevensons Hydraulics Dubbo
Endevour Mine Cobar	Summitt Cranes
Epiroc	Warrego Gypsum Mine
Face Contracting	Western Research Institute Bathurst
Fortescue Mines	Westrac
GB Auto	Workpac
Glencore CSA Mine	Yancoal Mine Mudgee
Green Distillation Technologies	Vertical Stairway
Kelly Tishler (LR)	Stephen Aracic (LR)
Fred Mallouk (LR)	George Mulder (LR)
Lee Hobden (LR)	Rod McCracken (LR)
Andrew Kemeny (LR)	James Haverhoek (LR)
John Darcy (LR)	Rebel Black (LR)
Laurie Cree (LR)	Maxine O'Brien (LR)
Sebastian Heisenburger (LR)	