Exploring the Social Enterprise Ecosystem in NSW

SUMMARY OF SEFA'S REGIONAL EMPOWERHER ROADSHOW

1 March 2024

Executive Summary

Social Enterprise Finance Australia (**Sefa**) secured funding from the Office of Social Impact Investment (**OSII**) to deliver capability building support to early-stage social enterprises focused on making a positive impact on women experiencing disadvantage.

Recognising that social entrepreneurs in regional areas experience significant barriers to accessing the capability support opportunities that are available to their urban counterparts, Sefa identified value in taking services to regional settings. To that end, Sefa developed the *EmpowerHer: Activating Changemakers* program (**the Program**), which:

- targets early-stage social enterprises focused on making a positive impact on women facing disadvantage,
- will be delivered over several months, in two regional locations and in collaboration with a local partner in each place,
- consists of a mixture of online learning, intensive in person workshops / 1:1 tailored support and peer learning; and
- addresses the need for in-person, placed based learning which is bespoke to the requirements of enterprises and considers local context, at the same time as raising the collective capability in the surrounding social enterprise space.

When designing the Program and considering two potential regional locations to activate (**Program Hubs**), it became apparent that there is limited data available about the location of women focused social enterprises in NSW and where there may be demand for capability support. To investigate the social enterprise ecosystem in more detail, Sefa conducted a roadshow in late 2023 (**Roadshow**) across 6 locations in regional NSW to:

- connect with regional community networks and business hubs across the State to identify activity and interest in the social enterprise sector; and
- interrogate the social enterprise activity in each region, assess interest in the region as a location for the Program and consider available infrastructure to support the Program and its ongoing success.

Sefa has compiled this report to share the insights gained from the Roadshow and from meeting with over 100 stakeholders interested in, supporting, or delivering activities that unlock positive social impact in regional NSW. By sharing our insights, we hope to add to the collective understanding of the social enterprise ecosystem in regional NSW and the types of supports and interventions that might lead to thriving clusters of impact first activity. The report is informed by our own experience and is intended to be a practical commentary on the regional social enterprise ecosystem in NSW as it currently exists.

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1. Background

CONTEXT

EmpowerHER: Activating Changemakers Program

The 2022-23 NSW Government budget allocated $1.29 million to provide tailored capability building support to help social enterprises that positively impact on women facing disadvantage in the State, to develop, grow, and maximise their social impact. The NSW Treasury Office of Social Impact Investment (OSII) commissioned a panel of social impact intermediaries to deliver this Social Enterprise Capability Building Program (CBP) over two years. In the short term, the CBP aims to increase social enterprises' organisational capability to deliver outcomes. In the medium and longer term, the CBP aims to increase the innovation and sustainability of social enterprises and the wider sector to deliver better outcomes, services, and value.

Sefa successfully tendered to join the panel of intermediaries to provide capability building support to both early stage and established social enterprises. Sefa's program is known as EmpowerHer. This overarching program has two tenets:

1. **EmpowerHER Regional Program: Activating Change Makers:** targeting regionally based, early-stage social enterprises.
2. **EmpowerHER Program: Strengthening Change Makers**: for more established social enterprises, anywhere in NSW, that are ready to leverage sound foundations.

The focus of this report is on the EmpowerHER Program designed to support early-stage social enterprises, which includes organisations that have traded commercially to achieve outcomes for women in NSW for between three months and two years.

The EmpowerHER: Activating Change Makers Program will:

- target early-stage social enterprises focused on making a positive impact on women facing disadvantage.
- be delivered over several months, in two regional locations and in collaboration with a local partner in each location.
- consist of a mixture of online learning, intensive in person workshops / 1:1 tailored support and peer learning; and
- address the need for in-person, placed based learning which is bespoke to the requirements of enterprises and considers local context, at the same time as raising the collective capability in the surrounding social enterprise space.

Place-Based Approach

Social entrepreneurs in regional areas experience significant barriers to accessing the capability support opportunities that are available to their urban counterparts. To address this gap, Sefa identified value in taking services to regional settings for early-stage social enterprises. However, it was recognised that working collaboratively with the local community was critical to ensure that any Program activities respond to the unique challenges and opportunities in each regional location and to also ensure that social enterprise capability uplift remains embedded within the community.

To this end, Sefa has adopted a place-based approach when considering the design and implementation of the EmpowerHER Program: -

> *"Place-based approaches are collaborative, long-term approaches to build thriving communities delivered in a defined geographic location. This approach is ideally characterised by partnering and shared design, shared stewardship, and shared accountability for outcomes and impacts. Place-based approaches are often used to respond to complex, interrelated, or challenging issues—such as to address social issues impacting those experiencing, or at risk of, disadvantage, or for natural disasters."* [1]

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[1] Queensland Council of Social Service, 2019. Place-based approaches for community change: QCOSS' guide and toolkit. West End, Qld (**QCOSS Guide**)

In the three months September to November 2023, Sefa undertook a Roadshow to investigate the social enterprise ecosystem across six regions in NSW, to assess where there may be demand for capability support and underpin the selection of two regional locations in which to activate Hubs for the EmpowerHER Program. The Roadshow is the first step in this collaborative, place-based approach – listening to and learning from key stakeholders and communities, identifying whether there is a shared commitment to make a positive impact, investigating community energy to support social impact activity and engaging with traditional custodians.

METHODOLOGY

The methodology used in designing / conducting the Roadshow and selecting the two Program Hubs is set out below.

Phase 1

- **Quantitative data analysis:** Sefa engaged the Impact Institute to undertake an analysis of key available data sets - to create profiles of eight regional locations in NSW and to inform decision making about which regions to include in the Roadshow. Given that social enterprise is not a separate legal structure that can readily be explored through the available data, focus was given to indicators that might suggest a cluster of purpose-driven enterprises supporting women facing disadvantage in each region (including Indigenous enterprises) and the economic conditions to encourage and sustain entrepreneurial activity. The data profiles of the eight regions (Northern Rivers, Murray Riverina, Mid North Coast, New England, Central West, Illawarra/Shoalhaven, Far South Coast, Hunter) are included in this report.
- **Desktop and literature review:** Sefa conducted a comprehensive desktop and literature review of each region to understand the characteristics of the local social enterprise ecosystem, supporting infrastructure, the presence of social enterprise activity, key stakeholders and where there may be market saturation in supporting the capability of the ecosystem.

ROADSHOW LOCATIONS

From the data analysis and desktop review, Sefa narrowed the Roadshow to six regions, with key towns of interest for potential Program Hubs identified in each. These are summarised below:

Region	Key towns visited
Northern Rivers	Lismore, Byron Bay, Mullumbimby, Ballina
Murray Riverina	Wagga Wagga, Albury
Mid North Coast	Port Macquarie, Taree, Coffs Harbour
New England	Armidale, Tamworth, Moree
Central West	Dubbo
Illawarra/Shoalhaven	Nowra

A decision was made *not* to include the Hunter region in the Roadshow because there is already significant capability building support available for social enterprises in the region and Sefa was keen to avoid potential duplication of effort (for example, the Social Impact Pre-Accelerator Program delivered by the University of Newcastle). Similarly, a decision was made *not* to include the Far South Coast because the data suggests there is potentially less women-focused impact activity as compared to other regions.

Phase 2

- **Qualitative data**: the intention of the Roadshow was to overlay the data analysis and desktop review of each region, with qualitative data obtained through interviews and discussions with key stakeholders. This was achieved in two main ways:

  - **Stakeholder interviews**: Sefa undertook outreach before conducting each Roadshow and connected either virtually or in-person with key stakeholders in the social enterprise ecosystem, supporting infrastructure, Indigenous enterprises and community leaders, and organisations guiding the economic strategy of the region (for example, Local Councils, Regional Development Australia officers and Chambers of Commerce). In total, Sefa conducted about 100 formal and informal stakeholder interviews during the Roadshow.

  - **In person events**: Sefa anchored each Roadshow with an in-person event (either delivered independently by Sefa or leveraging an existing sector event), to provide insights into the social enterprise sector, debunk common perceptions of social enterprise regionally, promote the EmpowerHer Program and provide an opportunity for the Sefa team to meet with social enterprises and other key stakeholders in person, in place. In total there were 67 attendees at the six Roadshow events.

Phase 3

- **Program Hub selection**: At the completion of the Roadshow, Sefa assessed and scored the six regions as potential Hub locations against the following criteria:

Criteria	Description
Economic	Economic features driving entrepreneurial activity including (for example): • Special Activation Precinct • Inland Rail / large scale infrastructure projects • Regional and local council strategic objectives • Renewable Energy Zones
Supporting Infrastructure	Local infrastructure to support delivery of the Program, including: • Established business networks (e.g., business chambers, co-working venues, RDA support) • In place local community partner(s) to assist in the delivery of the Program
First Nations Supporting Infrastructure	Local support and referral networks for First Nations social enterprises, which might include: • Existing in place collaborations with governance arrangements in place (e.g. Just Reinvest) • Concentration of Supply Nation registered organisations. • Presence of an Aboriginal Business Advisory Initiative advisor in place (through the NSW Indigenous Chamber of Commerce Inc) • Active and engaged Local Aboriginal Land Council
Women Focused Social Enterprise Activity	• Presence of women-focused social enterprises • Local demand for enterprise capability building • Service delivery and regional strategies with intentional gender lens
First Nations Social Enterprise Activity	• Presence of First Nations' women-focused social enterprises • Local demand for enterprise capability building from First Nations enterprises
Market Saturation	Large amount of capability building support for early-stage enterprises saturating the market (including incubators, accelerators, university programs)

Environmental	Local issues / challenges which might make implementation of the program challenging, including extreme weather conditions and natural disaster events
Accessibility	• Enterprises located within 'reasonable' travel distance from key towns (ie within 1.5 hours drive) • Public transport

REGIONAL HUB ACTIVATIONS

After assessing the regional Roadshow locations against the criteria, it was determined that the **Northern Rivers (Mullumbimby)** and the **Riverina (Wagga Wagga**) were the preferred locations to activate for the EmpowerHER Activating Changemakers Program. The unique characteristics of each region are discussed further below; however, it was identified that both the Northern Rivers and the Riverina have a suitable blend of entrepreneurial activity (demand) and economic conditions / established infrastructure (supply) to support a cluster of purpose driven activity.

2. Social Enterprise Place-Based Exploration and Activation

The Roadshow provided Sefa with an opportunity to explore the social enterprise ecosystem in regional NSW, engage with community and investigate local context. As would be expected, each location we visited had its own unique set of assets, strengths, challenges, and opportunities. However, common themes emerged as to how best to engage with key stakeholder groups and the conditions required to scaffold a cluster of activity seeking to make a positive impact. We discuss the themes around place-based exploration and activation below.

UNDERSTANDING PLACE AND ENGAGING WITH COMMUNITY

Engaging with local stakeholders

Sefa structured each regional visit to take place over several days, with in-person stakeholder consultations with people from a diverse range of organisations including business networks, social enterprises, local government, universities, community / social service organisations addressing disadvantage in the region, and Local Aboriginal Land Councils. Each Roadshow was also anchored by an in-person event to bring together the social impact or purpose-driven sector in the region. Sefa shared thoughts on why social impact matters and how it can make a difference in place at each of these events.

Local stakeholders were largely generous with their time as they want to see programs come to the region and for their regions to thrive. Notwithstanding, meeting with local stakeholders raised expectations of Sefa support in the region and care had to be taken to avoid conducting stakeholder consultations in a way that was purely extractive. Stakeholders valued that Sefa was approaching this program through a place led approach, in partnership with a local design and delivery partner, making genuine effort to account for local context and avoid generic solutions delivered through a place agnostic lens.

Sefa arranged the Roadshow visits so that there was free time to meet with the local community and connect with referrals made in-person. This is what the QCOSS (Queensland Council of Social Service) Guide refers to as *“loitering with intent”*. It was also necessary to allow time following the Roadshow for places to *“unfold” and for Sefa to ”unearth“ early stage social entrepreneurs.* That is, ongoing conversations with stakeholders peeled back layers of the community allowing a deeper understanding of the local context.

Engaging with the First Nations community

In each of the regions we sought to connect with First Nations leaders and connectors in place. The program prioritises participation of First Nations entrepreneurs and we are thus working in partnership with Yarpa Hub, a specialist organisation that supports Indigenous businesses and entrepreneurs to build their capability and connect to a wide range of business opportunities available throughout NSW. The Yarpa Hub team have deep connections into community and were able to introduce the Sefa team and the EmpowerHER Program to key leaders in some places. With these initial introductions it was possible to connect directly with entrepreneurs who would benefit from the EmpowerHER program.

We were also conscious of seeking support from the Local Aboriginal Land Council and/or Elders in place. We understand that relationships take time to nurture and develop and that trust is earned. We were only able to allocate 2 days to each of the six regions which is incompatible with the time it takes to develop deep relationships. As much as possible we spent time one on one with Indigenous entrepreneurs and leaders (i.e., rather than in the group settings) to try and create the space necessary to deeply listen and understand the opportunities and challenges being experienced in place. Phone calls, in advance of the visit and also subsequent to being in place have provided the opportunity to further develop these new relationships.

Finally, we were very keen to understand the mechanics of a program that would be acceptable and accessible to First Nations entrepreneurs. This involved seeking granular advice about: where to locate a Program Hub; which organisations could be canvassed as potential local delivery partners; how / if a mixed cohort (i.e., First Nations plus CALD plus others) would work in place; local politics; constraints that participants might experience (e.g. childcare, transport); and, specifically, how disadvantage is manifesting for Aboriginal women in place. These learnings will be taken into the co-design stage for each of the hubs.

Accessible language

Common terminology and language used in the city-centric social enterprise ecosystem often does not resonate with impactful organisations in the regions. Many founders/ organisations had not heard of the term “social enterprise”, and they do not identify as social entrepreneurs. Local changemakers connected more to language including “purposeful” business or “community” enterprise. With some notable exceptions, the stakeholders / leaders providing support to small business in the regions also did not have a deep understanding of social enterprise as a business model and the terminology that is commonly used in the city-centred ecosystem.

The language used can also create barriers for many First Nation businesses. The framing of social enterprise as being “for purpose” can be inaccessible or confusing when “working for their community” is what many First Nation businesses do as a matter of course. That is, entrepreneurial activity is often seen as a means of creating financial resilience not only for the entrepreneur but to also benefit the broader family and community.

Supporting Infrastructure / Partners

Committing to place requires long-term engagement with community. Given the short-term nature of the EmpowerHER funding cycle it was recognised that a strong in-region partner was required, not only to amplify the local expertise already in place, but to ensure that the long-term objectives of building the sustainability of social enterprises in the region could be supported going forward. Regional communities are fatigued with fly in / fly out service providers and want to work with organisations that are embedded and respected in community and that can sustain efforts after funding cycles end. As such, an effective collaboration with a local delivery partner was seen as critical to the success of the Program.

In our consultations it became clear that a local partner needed to be culturally safe and accessible and that it was important to understand how any potential partners were viewed locally. Many potential partners were accessible to some members of the community but exclusive to others. It was also apparent that the physical location of a potential partner mattered – with poor transport options in much of regional NSW, an isolated physical location of a partner could mean it was inaccessible and disconnected from community.

UNDERSTANDING CONDITIONS FOR CHANGE

Emerging Themes for Change

The EmpowerHER Program is focused on supporting social enterprises that are seeking to make a positive impact on women experiencing disadvantage. As such, it was critical to understand key issues for women in the regions and the community commitment to addressing themes of gender and disadvantage.

Common themes of disadvantage arose across the regions – including: family and domestic violence; lack of affordable childcare (or in many cases, any childcare); ingrained gender norms that prevent / constrain women from securing employment and financial independence; and lack of transport options. In some regions, affordable housing was an acute issue particularly for women with less financial security and/or dependents. And in regions affected by recent disaster weather events (e.g., Lismore) disaster recovery and resilience remain critical, with noticeable gendered impacts.

Notwithstanding the common themes, the ways in which regions were seeking to address disadvantage faced by women differed. In some regions, services, or programs to support disadvantage more broadly in the community were not applied with a gender lens, even though many of the challenges were clearly having a disproportionate impact on women. We identified a lack of gender lens curiosity in community as an indication that a region was most likely not ready to engage with the Program and scaffold change for women.

Community Momentum for Change

The culture of the community is an important foundation for activating change in the region – there needs to be a genuine desire to see others thrive, build a network, share, and refer onwards. Without community momentum for change, the region may not be ready for an innovative program or would require more time and capacity building than funding allows.

A key contributor to the culture of a community is Local Council and business community priorities. Our insights from the Roadshow were that, where the local government and business leaders are interested in and committed to social justice issues, there is likely to be greater prevalence of purpose-driven entrepreneurial activity in place.

Furthermore, visibility of community members undertaking entrepreneurial activities, or leading an initiative for the benefit of community, was an important precursor to community momentum for change. This was particularly true for female founders and First Nations Community, as we heard often “you can't be what you can't see”.

Economic Conditions and Resources

We found that the concept of establishing a social enterprise or impactful business was seen as a luxury for communities in survival mode, especially those experiencing recent or ongoing natural disasters. There needs to be a baseline of economic resilience and opportunity for a social enterprise cluster to emerge and thrive. The availability of other resources and potential financial support in the region (philanthropic funders, community foundations, civic minded businesses) to sustain enterprise activity is an important condition for change. We saw opportunities for ideation stage support for those regions with entrepreneurial activity and a community appetite to support positive social change.

3. Regional NSW: Data Analysis and Insights for roadshow locations

3.1. NORTHERN RIVERS

REGIONAL SNAPSHOT

NORTHERN RIVERS

99,416

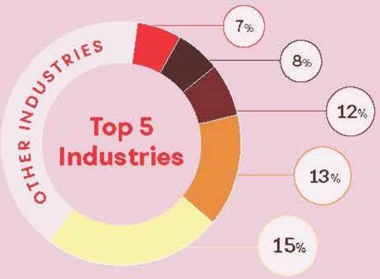
Employed persons aged 15+

19,735 Business owners

Indigenous business owners **332**

12,468 Businesses in key social enterprise industries

8,154 female business owners



🟥 7% Retail

⬛ 8% Agriculture

🟫 12% Professional services

🟧 13% Healthcare

🟨 15% Construction

Regional Economic Development Strategy Zone: Northern Rivers

$8.84b Size of Economy

ZONE INCLUDES FOCUS LOCATION OF BALLINA/LISMORE/BYRON

Establishment of the Richmond Valley Jobs Precinct

$23m to expand the Ballina Byron Gateway Airport

$17m the Northern Rivers Rail Trail project

$313m Lismore Base Hospital Redevelopment

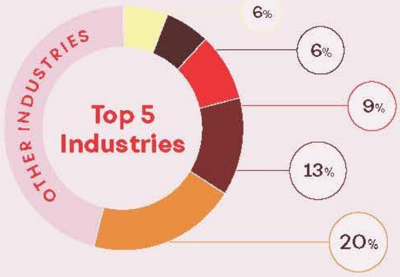
KEY REGIONAL ISSUES

Housing availability & affordability

Workforce constraints

Building resilience after natural disasters

8,154 female business owners



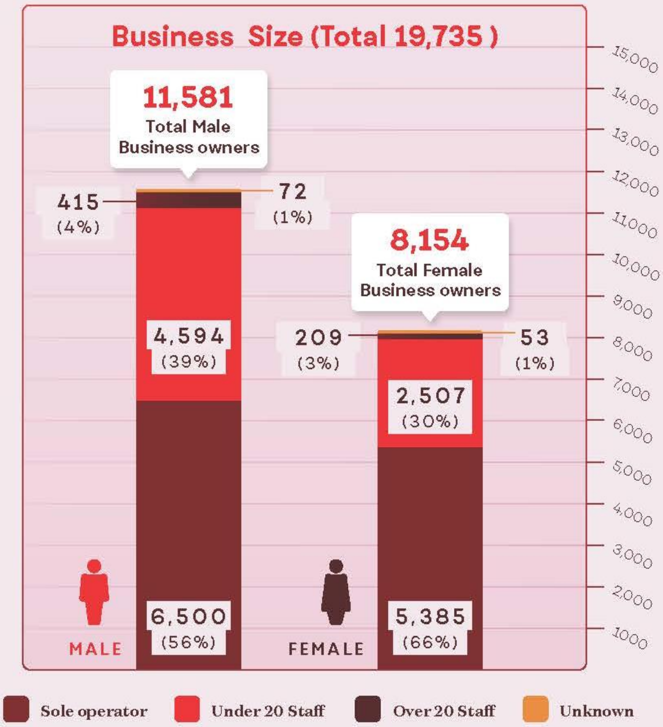
🟨 6% Education

⬛ 6% Agriculture

🟥 9% Retail

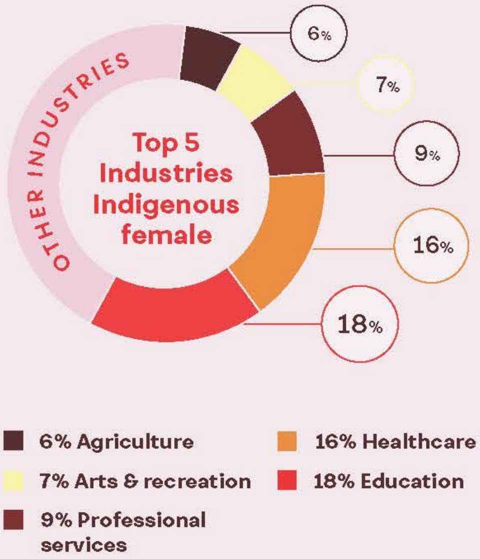
🟫 13% Professional services

🟧 20% Healtcare



Census data drawn from Australian Bureau of Statistics Census 2021. Economic data drawn from various Commonwealth and State government reports, in particular NSW's Regional Economic Strategies. Differences in boundaries are highlighted in headings or descriptions. Other minor data variations between census tables were aligned to simplify reading of these infographics by proportionally distributing variations between groups.

145 female Indigenous business owners

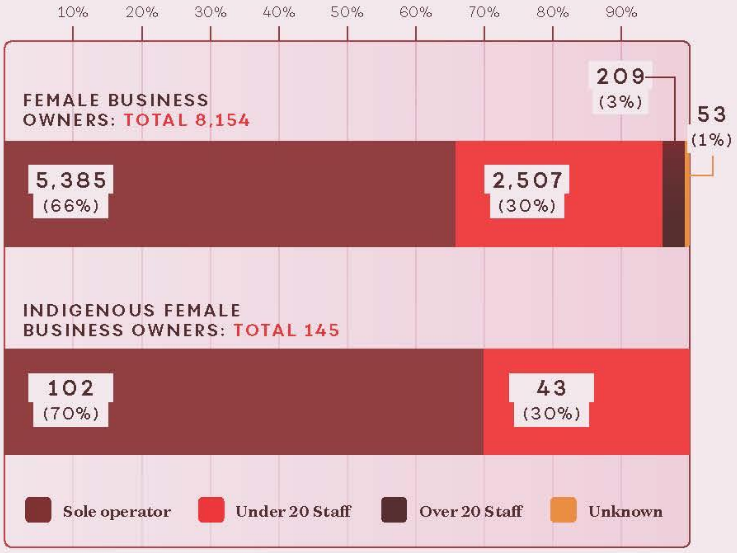


Representation as business owners:

Indigenous female population vs business ownership

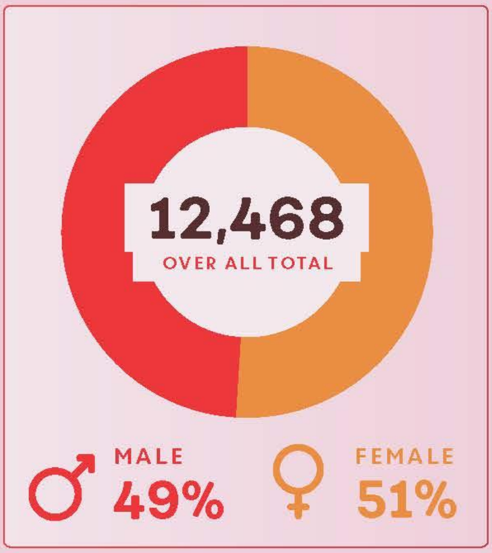
Indigenous women are **3.73%** of the overall female population but only **1.8%** of female business owners

BUSINESSES OWNERS: FEMALE VS INDIGENOUS FEMALE

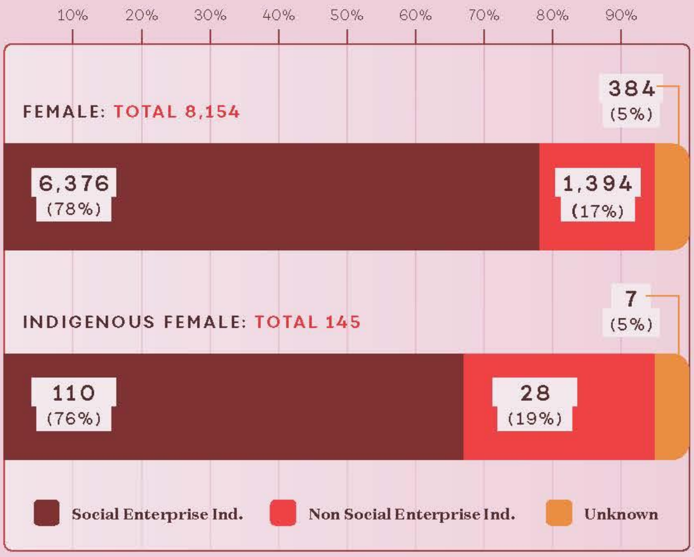


BREAKDOWN: Ownership of businesses in key social enterprise industries

BUSINESSES IN KEY SOCIAL ENTERPRISE INDUSTRIES MALE VS FEMALE



BUSINESSES IN KEY SOCIAL ENTERPRISE INDUSTRIES FEMALE VS INDIGENOUS FEMALE



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ROADSHOW SUMMARY

The Sefa team travelled through the Northern Rivers and conducted consultations in Lismore, Byron Bay and Mullumbimby. Eight stakeholders were consulted in-person, and 13 stakeholders were interviewed virtually. Sefa ran a successful networking event at Byron Community College, Mullumbimby which was attended by around 20 social impact stakeholders.

ECOSYSTEMS INSIGHTS

The Northern Rivers region has been challenged by several major shocks since 2018. Drought up until 2020 and the major bushfires of the 2019-20 season, significantly impacted key sectors including agriculture. The start of the COVID-19 pandemic and its prolonged impact placed significant strain on many local businesses and catastrophic flood events in 2022 caused widespread damage in the region[2].

Northern Rivers communities are focussed on reconstruction with significant focus on access to secure and affordable housing, supporting women experiencing domestic violence, mental health resilience building, and community-led preparedness for future events. There is a significant anger and distrust towards government. The reconstruction program raised community expectations that were not met, especially regarding financial support.

Having said that, there is a large appetite and grassroots level support for purpose-driven business in the region. There is also significant supporting infrastructure, including the Byron Community College and several foundations focused on social enterprise that have the capacity to support social entrepreneurial activity. including Ingrained (the Stone + Wood foundation) and the Northern Rivers Community Foundation. There is also top-down support for social enterprise activity from the Council, business chamber and Business NSW.

SUPPORT FOR A THRIVING SOCIAL ENTERPRISE ECOSYSTEM

The Northern Rivers has the ingredients to be a successful Hub, with sufficient social enterprise activity seeking to make a positive impact on women. Community interest in social enterprise and community momentum for change can support a cluster of impactful activity going forward and provide a solid foundation for collaborative systems change through establishment of a Program Hub. The cluster of activity could be supported top-down by local philanthropy and business.

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[2] Department of Regional NSW, February 2023, Northern Rivers Regional Economic Development Strategy – 2023 Update

3.2. RIVERINA

REGIONAL SNAPSHOT

RIVERINA REGION

74,964

Employed persons aged 15+

10,278
Business owners

Indigenous business owners **197**

3,600
Female business owners

4,617
Businesses in key social enterprise industries

Regional Economic Development Strategy Zone: Eastern Riverina

$5.75b Size of Economy

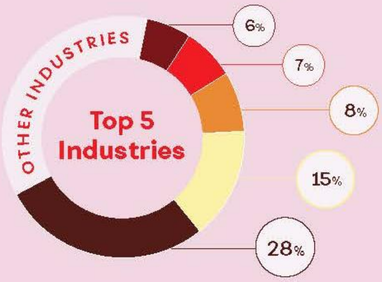
ZONE INCLUDES FOCUS LOCATION OF WAGGA WAGGA

$78.6m
The Riverina Intermodal Freight and Logistics Hub

$72m
To upgrade key railway infrastructure

$200m
Expansion of the Junee Correctional Centre

$30m
investment to expand Junee Prime Lamb

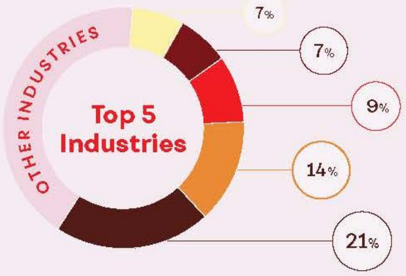


- 6% Professional services
- 7% Retail
- 8% Healthcare
- 15% Construction
- 28% Agriculture

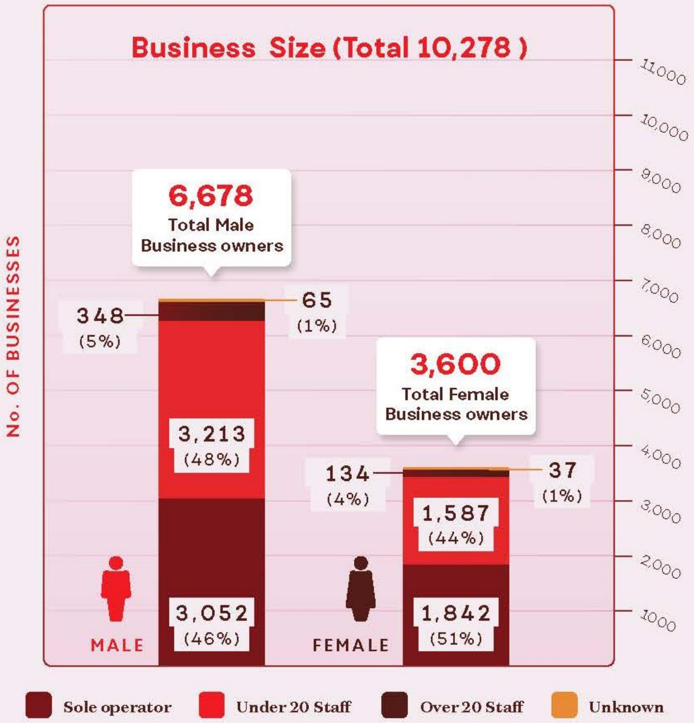
KEY REGIONAL ISSUES

- Housing availability & affordability
- Workforce constraints
- Growing the visitor economy

3,600 female business owners

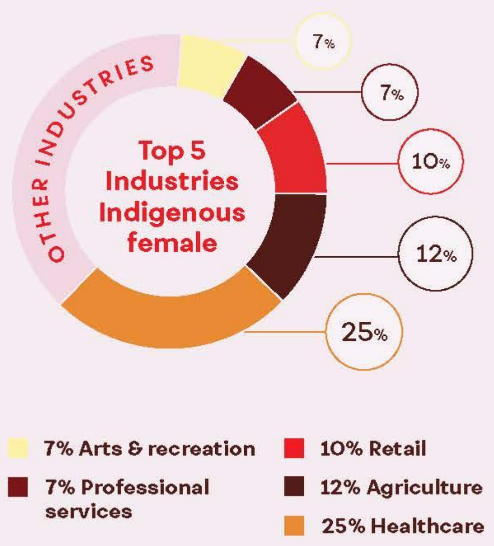


- 7% Accommodation
- 7% Professional services
- 9% Retail
- 14% Healthcare
- 21% Agriculture


Business Size (Total 10,278)

Census data drawn from Australian Bureau of Statistics Census 2021. Economic data drawn from various Commonwealth and State government reports, in particular NSW's Regional Economic Strategies. Differences in boundaries are highlighted in headings or descriptions. Other minor data variations between census tables were aligned to simplify reading of these infographics by proportionally distributing variations between groups.

69 female Indigenous business owners

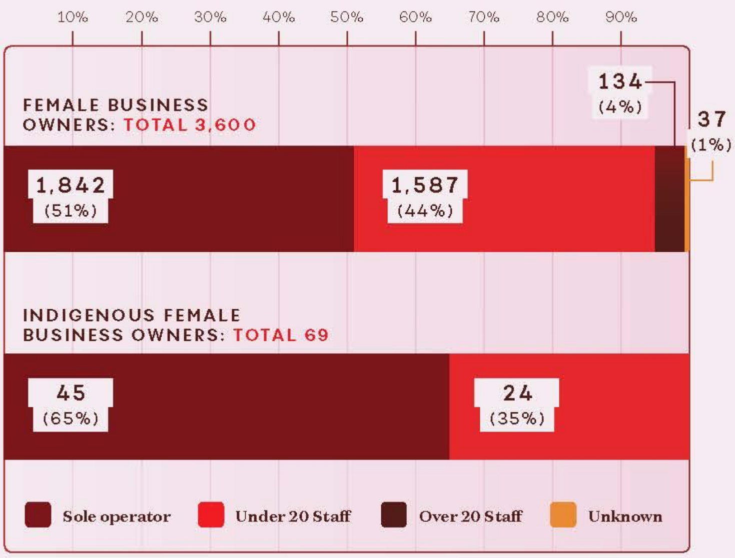


Representation as business owners:

Indigenous female population vs business ownership

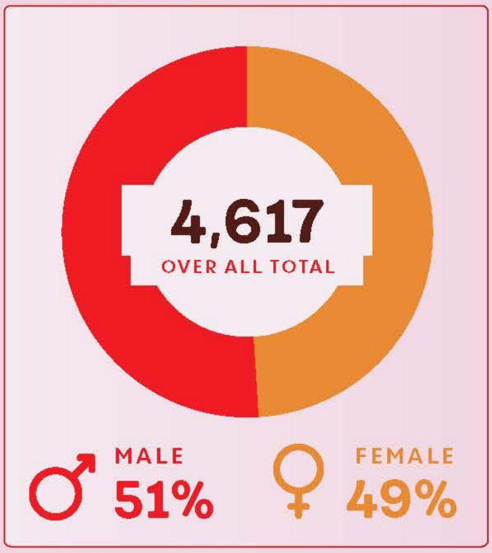
Indigenous women are 4.62% of the overall female population but only 1.9% of female business owners.

BUSINESSES OWNERS: FEMALE VS INDIGENOUS FEMALE

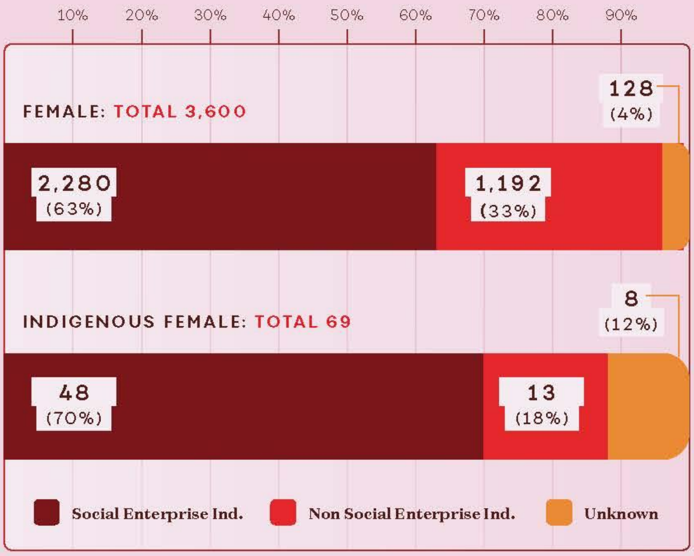


BREAKDOWN: Ownership of businesses in key social enterprise industries

BUSINESSES IN KEY SOCIAL ENTERPRISE INDUSTRIES MALE VS FEMALE



BUSINESSES IN KEY SOCIAL ENTERPRISE INDUSTRIES FEMALE VS INDIGENOUS FEMALE



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ROADSHOW SUMMARY

The Sefa team's trip to the Riverina Region in November 2023 prioritised time in Wagga Wagga with a brief stop in Albury. The team interviewed 13 stakeholders from the region and had six people attend an in-person event that was hosted at the Charles Sturt University Innovation Hub, Wagga Wagga.

ECOSYSTEM INSIGHTS

The Riverina is a place of economic diversity and growth with significant agricultural, transport, mining, and health care industries. It is also being prioritised for investment by the NSW government, through the Wagga Wagga Special Activation Precinct, the Albury Regional Job Precinct, Inland Rail and the South-West Renewable Energy Zone.

It is a region where entrepreneurialism is encouraged – the local Member of Parliament, the Wagga Council, the Business Chamber and Wagga Women in Business are all active, engaged and supportive of local businesses as they navigate opportunities associated with this activity.

The area is also home to significant organisations that are playing a vital 'community infrastructure' role across various sectors including (but not limited to) education (e.g. Charles Sturt University, Riverina Community College), the arts (e.g. Eastern Riverina Arts), multicultural (e.g. Multicultural Council), First Nations (e.g. Ngurra Hub), health (e.g. Women's Health and Wellbeing Services and Medical Aboriginal Cooperation) and small business (e.g. Enterprise Plus). There are examples of collaborations amongst organisations and across sectors in place – signalling an overall enabling environment for purpose-driven entrepreneurs.

Positive economic opportunities in the region have seen an influx of people to place which has resulted in housing challenges. Access to affordable housing was one issue that was identified as being a significant challenge for women in the region. Women also identified lack of childcare, poor public transport, limited access to services and ongoing economic hardship as challenges that they are grappling with.

In Wagga Wagga there is a clustering of social enterprise activity in the creative sector – spanning art, theatre, fashion, textiles and craft. There is a strong level of community support for First Nations and female-led business, and a visible number of female role models/leaders in the social impact and First Nations community space.

SUPPORT FOR A THRIVING SOCIAL ENTERPRISE ECOSYSTEM

Wagga Wagga is a conducive environment to social enterprise – there is a large migrant and refugee community (12% of Wagga), an active First Nations community, there is economic opportunity, supportive infrastructure for entrepreneurs (including the CSU Indigenous entrepreneur program), a vibrant creative sector and arts programming. We found there to be culture of generosity – with leaders supporting emerging businesses and entrepreneurs to develop their confidence. It is a suitable place to locate a Program Hub because the ecosystem in place is active without being saturated and there is a breadth of complimentary infrastructure that could be part of the program delivery and / or from which organisations can be referred in or out of.

3.3. MID NORTH COAST

REGIONAL SNAPSHOT

MID NORTH COAST REGION

77,133

Employed persons aged 15+

12,705
Business owners

Indigenous business owners **384**

4,879
female business owners

7,541
Businesses in key social enterprise industries

Regional Economic Development Strategy Zone: Mid Coast

$4.32b
Size of Economy

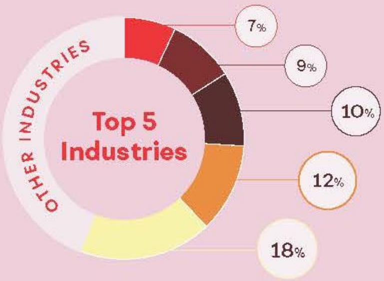
ZONE INCLUDES FOCUS LOCATION OF PORT MACQUARIE

$15m
Northern Gateway Transport Hub development

$20m
Invested in the Forster Civic Precinct project

$150m
Invested in road upgrade projects

$100m
Manning Hospital Redevelopment Stage 2

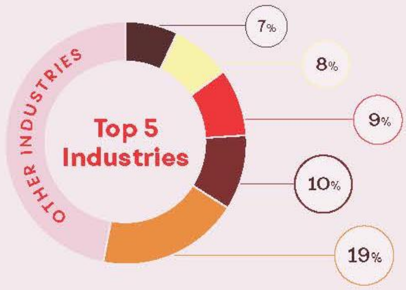


- 🟥 7% Retail
- 🟥 9% Professional services
- ■ 10% Agriculture
- 🟧 12% Healthcare
- 🟨 18% Construction

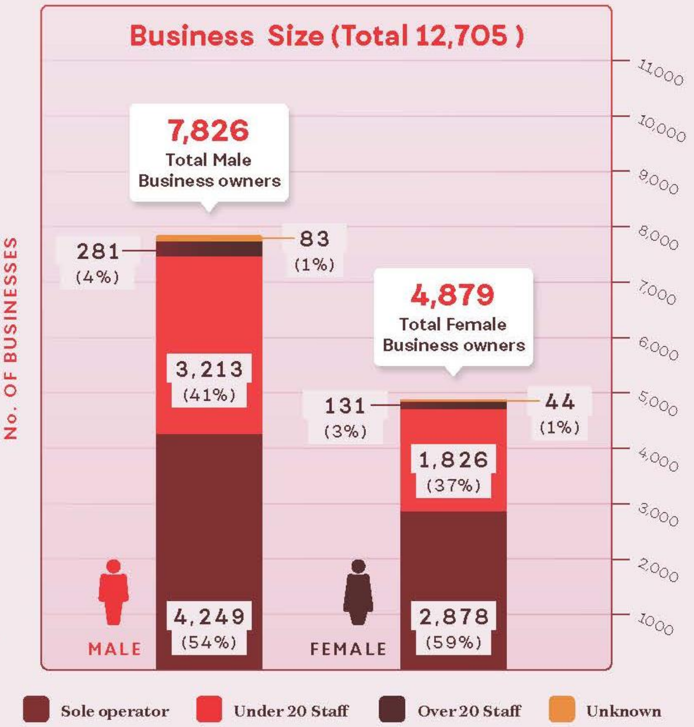
KEY REGIONAL ISSUES

- Sustainable population growth
- Skills training and education pathways
- Equitable socioeconomic outcomes

4,879 female business owners



- ■ 7% Agriculture
- 🟨 8% Accommodation
- 🟥 9% Retail
- 🟥 10% Professional services
- 🟧 19% Healthcare



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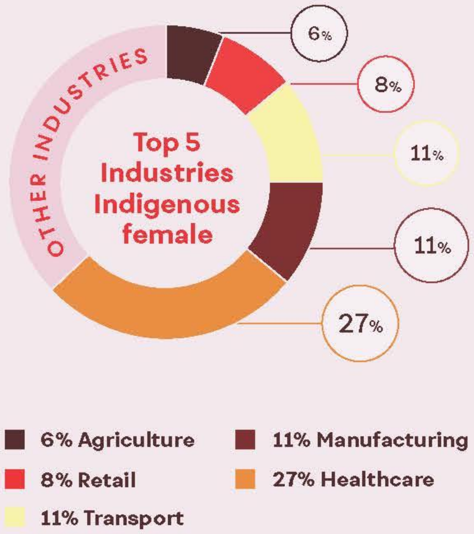
149 female Indigenous business owners

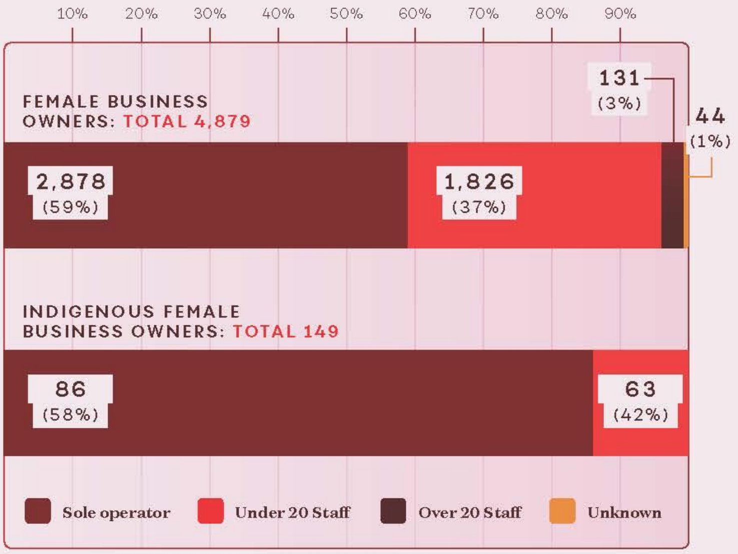
Representation as business owners:

Indigenous female population vs business ownership

Indigenous women are 5.84% of the overall female population but only **3%** of female business owners.

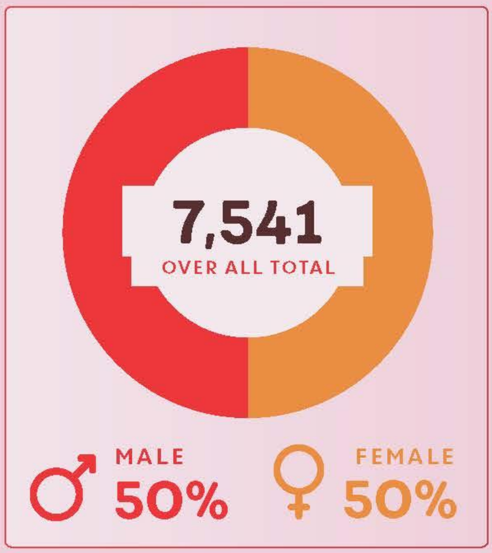


BUSINESSES OWNERS: FEMALE VS INDIGENOUS FEMALE

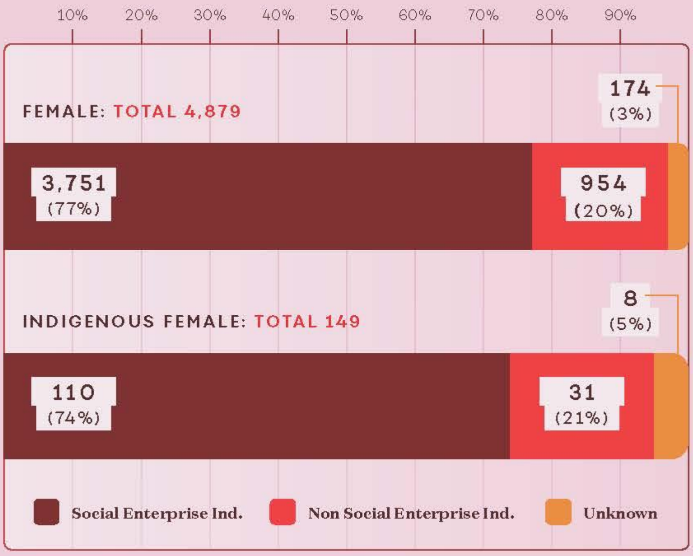


BREAKDOWN: Ownership of businesses in key social enterprise industries

BUSINESSES IN KEY SOCIAL ENTERPRISE INDUSTRIES MALE VS FEMALE



BUSINESSES IN KEY SOCIAL ENTERPRISE INDUSTRIES FEMALE VS INDIGENOUS FEMALE



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ROADSHOW SUMMARY

The Sefa team travelled through the Mid Coast in September 2023. The team visited Wingham, Taree, Port Macquarie and Coffs Harbour. The roadshow culminated at the "*Social Impact in the Regions*" event in Coffs Harbour, which was hosted by Evolve Group Network from 6 – 8 September and where Sefa facilitated a workshop. 13 stakeholders were consulted formally, and numerous consultations were conducted informally.

ECOSYSTEM INSIGHTS

There is significant top-down support for small business and impact-driven activity in the Mid North Coast. The top priorities from the Coffs Coast Regional Economic Development Strategy 2023 include:

- supporting growth of emerging industries, including knowledge intensive, creative and green economy sectors.
- enhancing regional resilience by supporting implementation of sustainable practice in the engine industries and investing in robust physical and digital connectivity[3].

Coffs Harbour has a well-connected business ecosystem. The business development support provided by The City of Coffs Harbour 6 degrees and the Coffs Coast Destination Services (supporting tourism and ancillary businesses) gives business opportunity to showcase and promote, background training and advisory services and opportunities to connect and network with other businesses. Coffs City Council has a new location at Yarrila Place which combines arts, people, technology and culture with the aim of creating a vibrant community hub. Furthermore, Charles Sturt University at Port Macquarie has a new strategic direction to deliver programmatic innovation courses.

We heard several times about the community minded nature of the region - there are many not-for profit community organisations in Coffs Harbour and in the region more broadly, that there are many community, purpose-driven organisations, but that they do not operate under a social enterprise model. It is interesting to note that Coffs Harbour is a Refugee Welcome Zone and that there have been programs in place to support micro business development for refugees.

Notwithstanding all the above, there did not appear to be a cluster of social enterprise activity in the region that would be sufficient to create demand for a successful Hub. There was interest in social enterprise as a means of diversifying revenue streams for Not-For-Profits / charities in the region, but this interest was very much at the ideation stage of enterprise development. In terms of women-focused entrepreneurial activity, strong gender norms remain in the region which act as real barriers for women starting businesses and a culture that prevents women from having the confidence to identify as a businesswoman.

SUPPORT FOR A THRIVING SOCIAL ENTERPRISE ECOSYSTEM

There is emerging interest in social enterprise in the region, both from top-down infrastructure such as local council and universities; and bottom up from community organisations and not-for-profit enterprises as a means of diversifying revenue streams. Our observations are that this interest is at the ideation stage of social enterprise development – with support required around fundamental concepts such as social business model ideation and social mission development.

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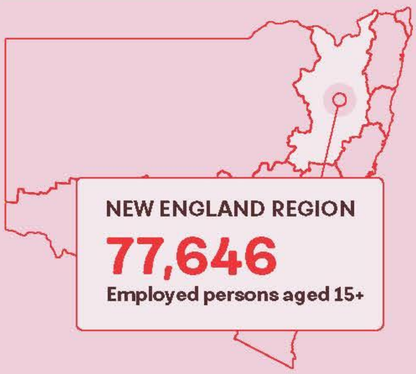
[3] Department of Regional NSW, February 2023, Coffs Coast Regional Economic Development Strategy – 2023 Update

3.4. NEW ENGLAND

REGIONAL SNAPSHOT



11,435 Business owners

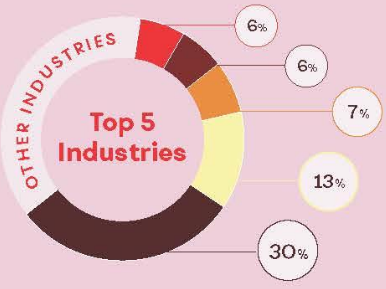
Indigenous business owners **352**

4,093 female business owners

4,978 Businesses in key social enterprise industries

Regional Economic Development Strategy Zone: Lower Northwest

$5.4b Size of Economy



- 🟥 6% Retail
- 🟫 6% Professional services
- 🟧 7% Healthcare
- 🟨 13% Construction
- ⬛ 30% Agriculture

ZONE INCLUDES FOCUS LOCATION OF TAMWORTH

Renewable Energy Zone

$47m to establish the UNE Tamworth Campus

$53m Gunnedah Hospital Redevelopment

Establishment of the Tamworth Business Park

$100+m invested into road & rail and intermodal facilities

$4m Gunnedah Airport upgrade

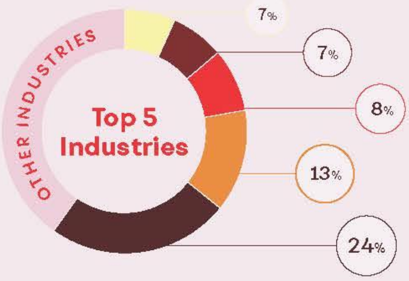
KEY REGIONAL ISSUES

Housing availability & affordability

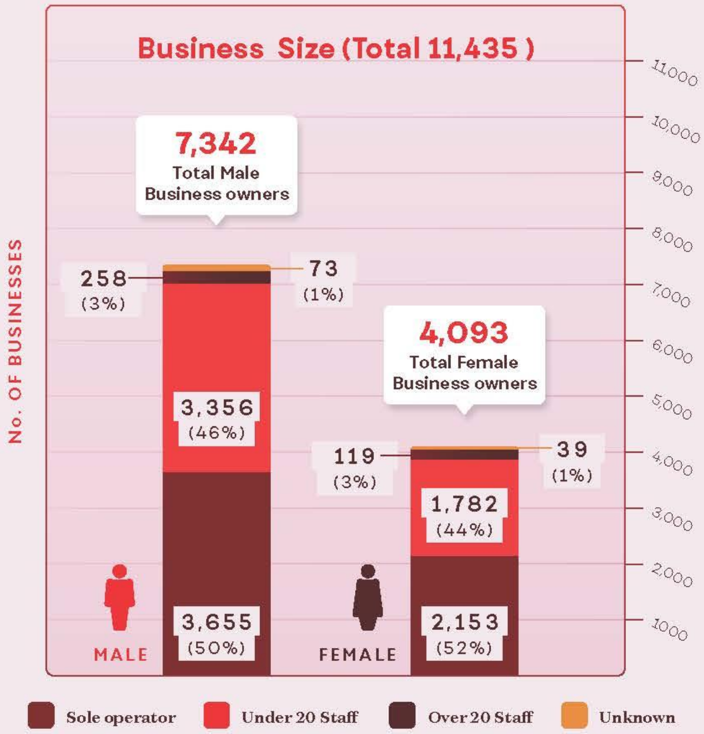
Workforce constraints

Secure Water supply

4,093 female business owners



- 🟨 7% Accommodation
- 🟫 7% Professional services
- 🟥 8% Retail
- 🟧 13% Healthcare
- ⬛ 24% Agriculture



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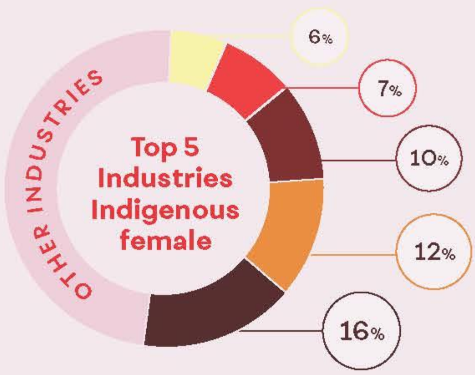
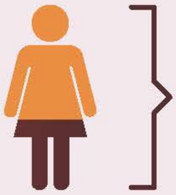
135 female Indigenous business owners



- 🟨 6% Construction
- 🟥 7% Retail
- ■ 10% Administrative
- 🟧 12% Healthcare
- ■ 16% Agriculture

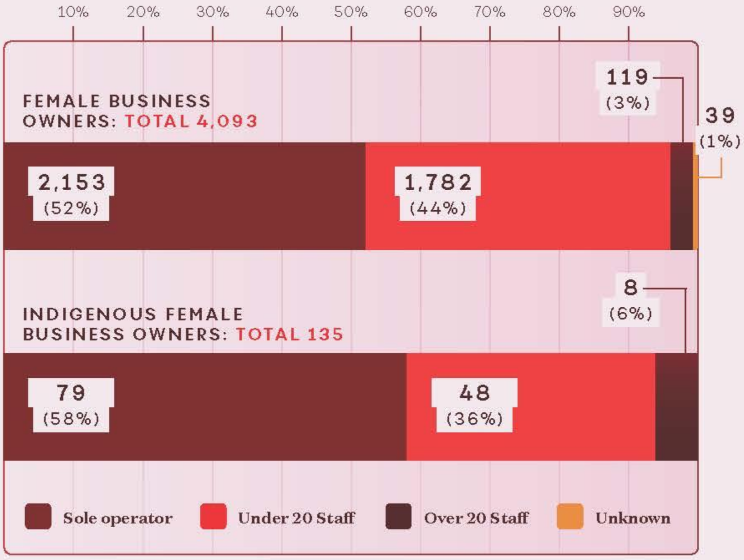
Representation as business owners:

Indigenous female population vs business ownership



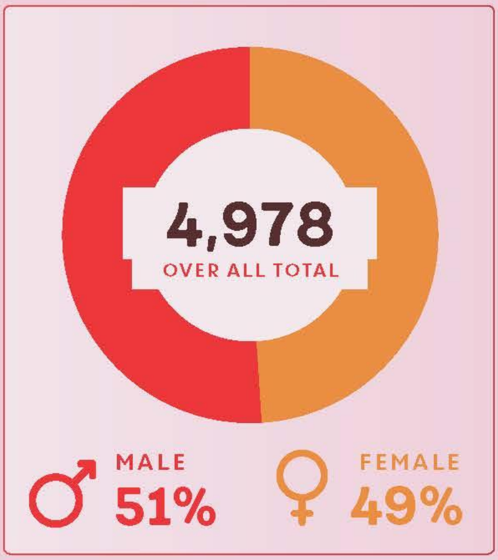
Indigenous women are 8.6% of the overall female population but only **3.3%** of female business owners.

BUSINESSES OWNERS: FEMALE VS INDIGENOUS FEMALE

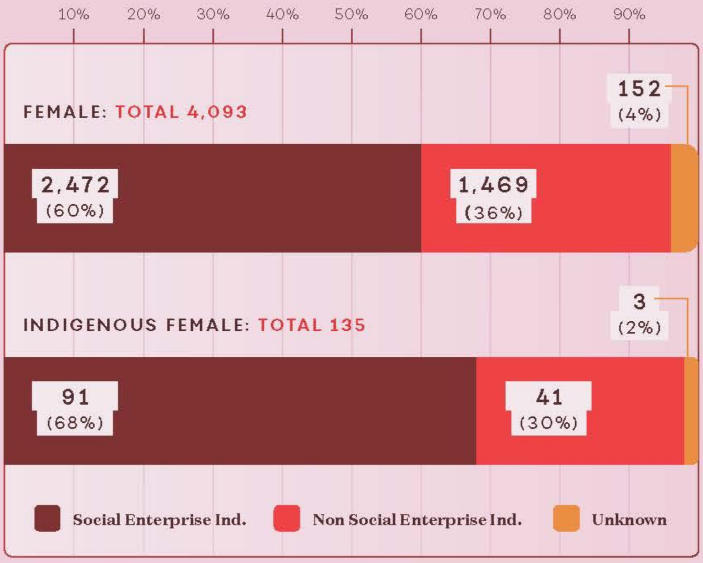


BREAKDOWN: Ownership of businesses in key social enterprise industries

BUSINESSES IN KEY SOCIAL ENTERPRISE INDUSTRIES MALE VS FEMALE



BUSINESSES IN KEY SOCIAL ENTERPRISE INDUSTRIES FEMALE VS INDIGENOUS FEMALE



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ROADSHOW SUMMARY

Sefa travelled through the New England Region in October, visiting Armidale, Tamworth and Moree. 19 stakeholder interviews were conducted and ten people attended Sefa's networking event. Sefa was able to partner with SECNA and contribute at a Business for Good Lunch which was held at the University of New England's Smart Region Incubator (UNE SRI) in Armidale.

ECOSYSTEM INSIGHTS

The New England region produces about 20% of NSW's agricultural output and is home to 16% of all farm businesses in the State. It has a growing economy and the NSW Government's *New England North West Regional Plan 2041*[4] outlines significant growth sectors and opportunities. Several projects are underway to support the region's transformation e.g., Moree and Narrabri Special Activation Precincts, Renewable Energy Zone and Inland Rail.

First Nations leadership in community is strong and visible. Aboriginal and Torres Strait Islander people account for about 10% of the population in New England[5] (compared to about 3.5% for NSW overall). Tamworth is the economic centre: it has a growing economy and population and is also where several key national and state organisations focusing on Indigenous people have regional representation e.g., National Indigenous Australians Agency and Indigenous Business Australia. The Aboriginal Community Controlled Organisations in place are well established and deliver vital services and programs for community. There are also established and thriving Aboriginal owned businesses (e.g., Gomeroi Education).

The UNE SRI has a footprint in each of Armidale, Tamworth and Moree. Each hub offers a coworking space and some program delivery and events to support commercial business at start-up phase. The majority of members are women, and the primary industries are services across agriculture, environment and health. The UNE SRI programs do not have a focus on social impact organisations despite the appetite to engage with and support social enterprise. SSI's Ignite Small Business Startups Program has been operating for 10 years and targets a very different cohort to UNE. It is a whole of community program delivered in Armidale with a focus on refugees and asylum seekers, First Nations people and people living with disability. Participants are at the very initial stages of establishing their businesses.

Like other regions, there are thematically similar issues facing women (i.e., access to secure and affordable housing and family and domestic violence). There are active women shelters across the region, some of which are looking for alternative revenue streams as securing core funding becomes more challenging. A unique Community Support Hub established by Homes North in Armidale provides a comprehensive set of essential and wrap-around services for women including crisis and longer-term housing, homelessness services, disability and youth services.

We met a number of Aboriginal owned and operated social enterprises addressing access to work and employment opportunities; connection to culture and community through food, art and on country practices; and provision of mentoring and leadership to young people. Despite not being gender intentional, many do support women in community or are starting to deliver programming specifically for girls and women. Opportunities in the trades, construction and infrastructure sectors for women are slowly becoming more mainstream, creating more training and employment opportunities, and are also challenging gender standards in specific industries.

SUPPORT FOR A THRIVING SOCIAL ENTERPRISE ECOSYSTEM

The New England region is vast in size and distances between major centres are significant, making it difficult to deliver a program that would be accessible to people from across the region. The social and economic infrastructure in the region does indicate that there could be good referral pathways into and out of a program targeting early-stage social entrepreneurs. There are strong First Nations leaders and examples of successful entrepreneurs that are playing vital leadership roles. There is appetite to encourage more social enterprises to establish themselves in the region, but the impact ecosystem is nascent. Furthermore, there were few examples of organisations that were applying an intentional gender lens to their work. It was not evident that there are enough eligible enterprises in the region to justify the establishment of a Program Hub there.

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[4] New England North West Regional Plan 2041 | Planning (nsw.gov.au)

[5] Australian Bureau of statistics, 2021 New England Census. https://www.abs.gov.au/census/find-census-data/quickstats/2021/CED130

3.5. CENTRAL WEST

REGIONAL SNAPSHOT

CENTRAL WEST REGION

91,919

Employed persons aged 15+

13,392 Business owners

Indigenous business owners **351**

4,865 female business owners

6,233 Businesses in key social enterprise industries

Regional Economic Development Strategy Zone: Dubbo

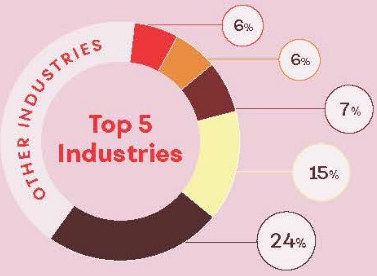
$3.76b Size of Economy

ZONE INCLUDES FOCUS LOCATION OF CENTRAL ORANA

- Central West-Orana Renewable Energy Zone
- **$50m** expand facilities at Taronga Western Plains Zoo
- Transport infrastructure projects
- **$306m** Dubbo Hospital Redevelopment

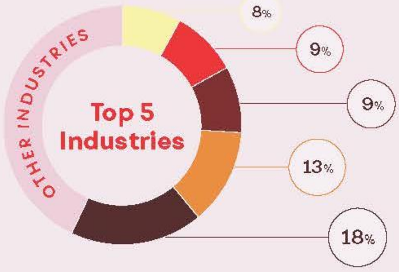
KEY REGIONAL ISSUES

- Housing availability & affordability
- Taking a long-term view on major projects
- Investing in the essentials

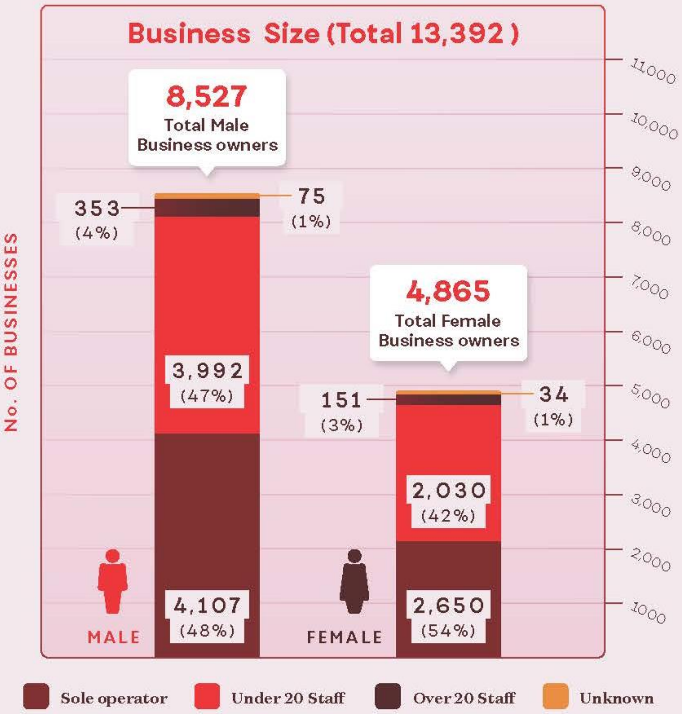


- 🟥 6% Retail
- 🟧 6% Accommodation
- 🟫 7% Professional services
- 🟨 15% Construction
- ■ 24% Agriculture

4,865 female business owners



- 🟨 8% Accommodation
- 🟥 9% Retail
- 🟫 9% Professional services
- 🟧 13% Healtcare
- ■ 18% Agriculture



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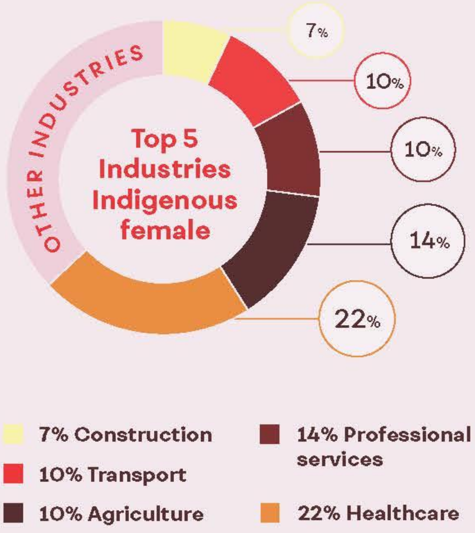
144 female Indigenous business owners

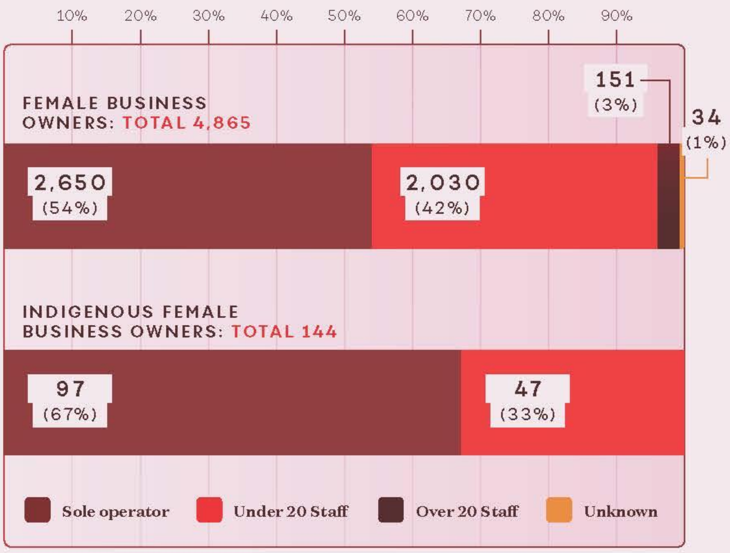


Representation as business owners:

Indigenous female population vs business ownership

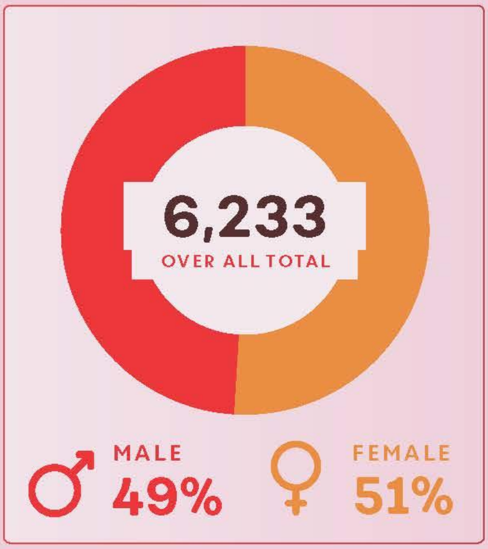
Indigenous women are **6.11%** of the overall female population but only **3%** of female business owners.

BUSINESSES OWNERS: FEMALE VS INDIGENOUS FEMALE

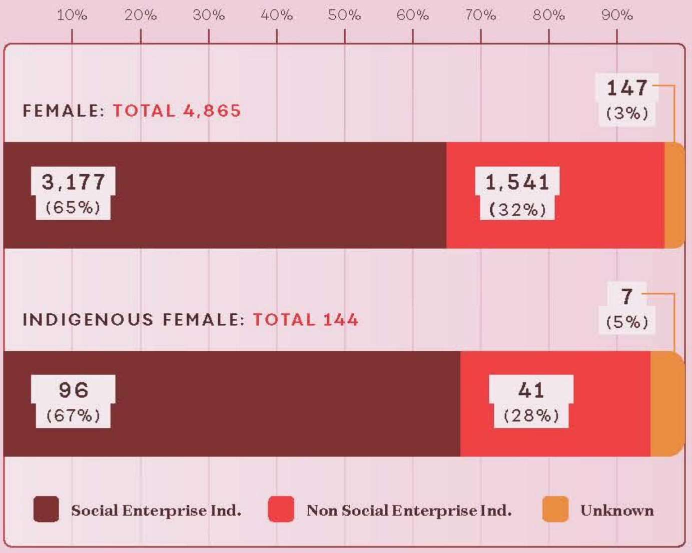


BREAKDOWN: Ownership of businesses in key social enterprise industries

BUSINESSES IN KEY SOCIAL ENTERPRISE INDUSTRIES MALE VS FEMALE



BUSINESSES IN KEY SOCIAL ENTERPRISE INDUSTRIES FEMALE VS INDIGENOUS FEMALE



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ROADSHOW SUMMARY

Sefa conducted the Central West Roadshow over 2 days in October 2023:

- nine informal conversations were conducted virtually before the Roadshow and seven stakeholders were interviewed during the Roadshow.
- Sefa ran an event at The Exchange, which was attended by eight people representing local business owners, social enterprises and supporting organisations. The Exchange is a key and visible supporter of small business within Dubbo.

ECOSYSTEM INSIGHTS

Dubbo is experiencing economic growth. It is a significant regional town in its own right and plays a vital role as the major centre for a wider region across Western NSW. It is the major health hub for the region which is an important economic driver. There are also other key economic drivers in the region including transport and logistics, agribusiness and value-adding (e.g., food processing, packaging and associated industries), tourism, mining and renewables (there has been an increase in rare earth mining and a solar energy focus) and a growing service sector (particularly for health, aged care and education services).

Whilst the economic outlook is strong, there are numerous pressing social challenges in Dubbo which require attention. These include access to secure and affordable housing, family and domestic violence, drug and alcohol abuse and access to childcare.

There are a very small number of social enterprises responding to social issues, such as Banksia House which is a majority Aboriginal owned business that provides support for children and families that come into contact with child protection services. There are also prominent community members endeavouring to raise awareness of and support social enterprise in the region. Notwithstanding, there is very limited traction around impactful/for purpose business in the region, and little knowledge of social entrepreneurship.

We were struck by a lack of gender lens being applied to programs directed at improving disadvantage in the community. The lack of gender lens programming is compounded by deeply ingrained gender norms. We heard time and again that women had child rearing responsibilities and without access to adequate childcare, they were unable to gain skills and create employment opportunities for themselves.

It did not appear that the nurturing of a social enterprise ecosystem was a priority – from a top-down perspective, and moreover, the community stakeholders that we met were largely unaware of the social enterprise / for-purpose business model. There is generally interest in learning about social enterprise but lack of top-down support for social impact activity is potentially a barrier to facilitating an emerging social enterprise ecosystem in the region at this time.

SUPPORT FOR A THRIVING SOCIAL ENTERPRISE ECOSYSTEM

Our observation is that the limited interest in social enterprise from key government and business stakeholders and lack of gender lens programming means that there is not sufficient momentum for change in the region to be able to support a Hub seeking to improve outcomes for women experiencing disadvantage. For a thriving social enterprise ecosystem to exist in Dubbo there would need to be a cultural shift that recognises the role impact organisations can play in addressing social challenges and for there to be top-down interest in supporting conditions for change.

3.6. ILLAWARRA / SHOALHAVEN

REGIONAL SNAPSHOT

ILLAWARRA/SHOALHAVEN

113,943
Employed persons aged 15+

14,706
Business owners

Indigenous business owners **223**

5,540
female business owners

9,825
Businesses in key social enterprise industries

Regional Economic Development Strategy Zone: Shoalhaven

$5.65b
Size of Economy

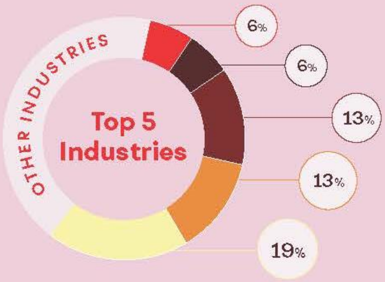
ZONE INCLUDES FOCUS LOCATION OF NOWRA

$342m
The Princes Highway upgrade - Nowra Bridge

$34m
To to deliver the Budanon Art Museum

$762m
Investment for the Milton/ Ulladulla bypass

$268m
Shoalhaven Hospital Redevelopment

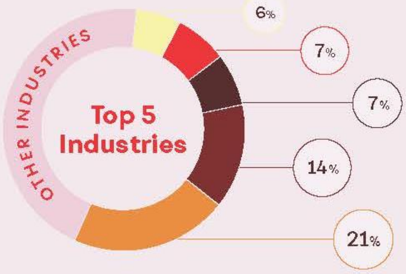


- 🟥 6% Retail
- ■ 6% Accommodation
- ■ 13% Professional services
- 🟧 13% Healthcare
- 🟨 19% Construction

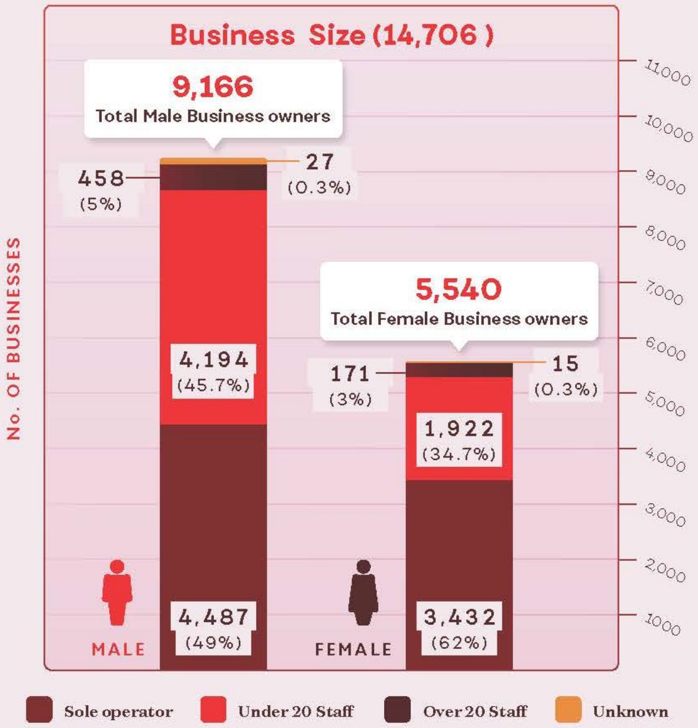
KEY REGIONAL ISSUES

- Housing availability & affordability
- Labour force and unemployment
- Economic development and liveability

5,540 female business owners



- 🟨 6% Accommodation
- 🟥 7% Retail
- ■ 7% Education
- ■ 14% Professional services
- 🟧 21% Healthcare



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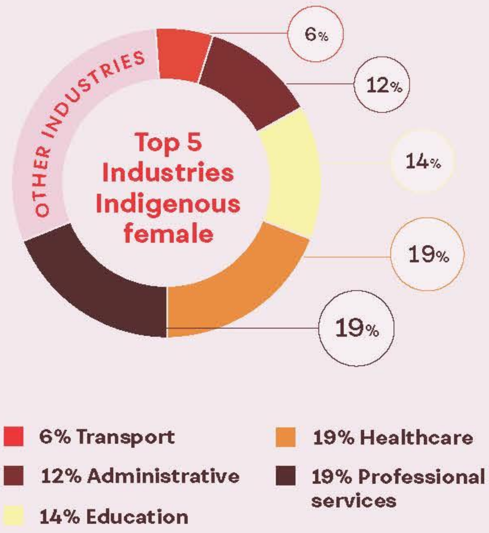
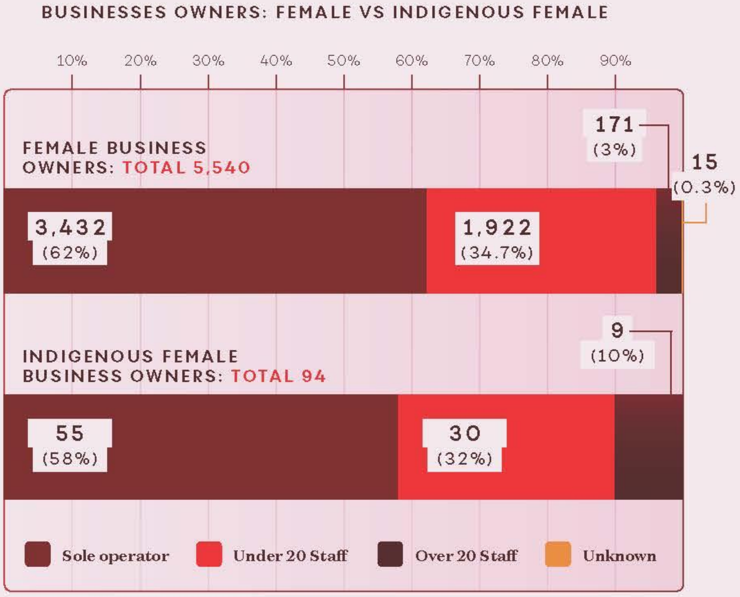
94 female Indigenous business owners



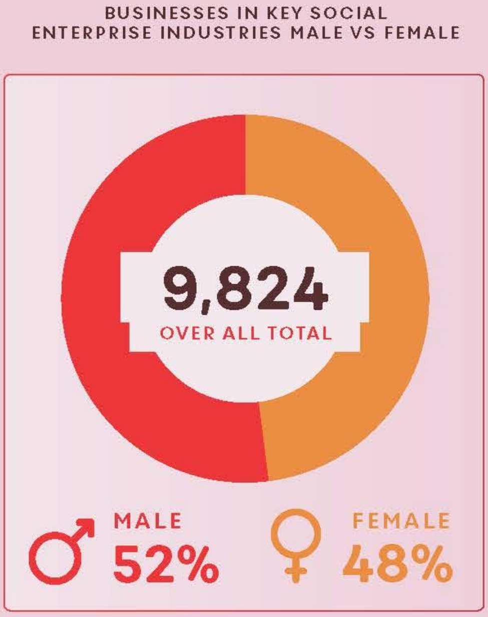
Representation as business owners:

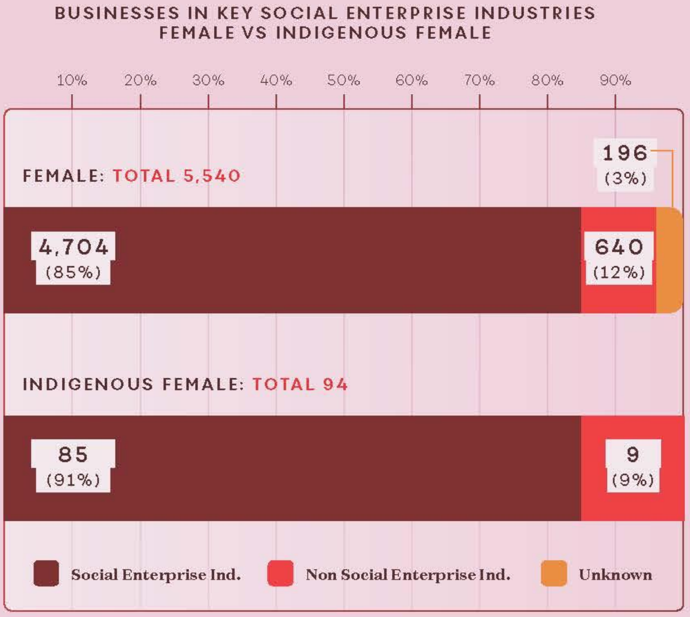
Indigenous female population vs business ownership

Indigenous women are **2.83%** of the overall female population but only **1.7%** of female business owners.



BREAKDOWN: Ownership of businesses in key social enterprise industries





Census data drawn from Australian Bureau of Statistics Census 2021. Economic data drawn from various Commonwealth and State government reports, in particular NSW's Regional Economic Strategies. Differences in boundaries are highlighted in headings or descriptions. Other minor data variations between census tables were aligned to simplify reading of these infographics by proportionally distributing variations between groups.

ROADSHOW SUMMARY

Sefa conducted the Illawarra/Shoalhaven Roadshow over two days in November 2023:

- 10 informal conversations were conducted virtually before the Roadshow and 3 stakeholders were interviewed during the Roadshow.
- Sefa ran a lunch event which was attended by approximately 10 local business owners, social enterprises and supporting organisations.

The Roadshow was limited to Nowra. A decision was made not to explore the Illawarra region more broadly as social enterprise activity in this region is well supported by the University of Wollongong.

ECOSYSTEM INSIGHTS

A sustained period of drought followed by major bushfires, storms and flooding has had significant environmental and economic impacts on the Shoalhaven region. For the period from 2018 to 2022, the region had 11 disaster declarations and received $30.98m in disaster recovery grants[6].

Several large NFP service providers have responded to the disaster events in the region, and we observed a curiosity from those organisations around social enterprise as a way of diversifying revenue streams. The Shoalhaven City Council was also seen as being supportive of social issues and the stakeholders we consulted appeared to have good partnerships with the council. However, resources are stretched, there are few role models and little local supporting infrastructure to guide innovation in this space. There is very little social enterprise activity aside from a small number of leading examples, including Waminda and its Blak Cede social enterprise and the Nowra Community Food Store.

In terms of women-led businesses, transport and lack of child-care were clearly identified as the two major barriers to women in the region returning to work and having financial security. The Shoalhaven LGA is vast, covering Berry in the North to Ulladulla in the South. The transport between the various towns is not well serviced, which would make accessibility an issue for any program delivery.

SUPPORT FOR A THRIVING SOCIAL ENTERPRISE ECOSYSTEM

We did not observe a cluster of social enterprise activity in the region sufficient to support a Program Hub. There appeared to be very little understanding of social enterprise and how it can address challenges in the region – both from the community (and potential beneficiaries) and business. The region is relatively well-serviced by NFP/s charities (because of disaster funding) with these organisations having an emerging interest in social enterprise as a means of diversifying revenue streams.

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[6] Department of Regional NSW, February 2023, Shoalhaven Regional Economic Development Strategy – 2023 Update

4. Regional NSW: Data Analysis and Insights for roadshow locations

4.1. FAR SOUTH COAST

REGIONAL SNAPSHOT

FAR SOUTH COAST
27,444
Employed persons aged 15+

5,205
Business owners

Indigenous business owners **90**

2,077
female business owners

3,024
Businesses in key social enterprise industries

Regional Economic Development Strategy Zone: Far South Coast

$3.68b
Size of Economy

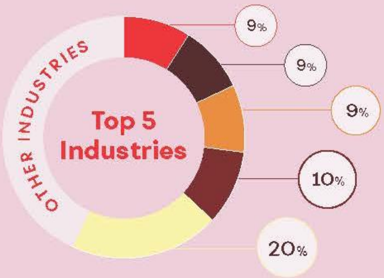
ZONE INCLUDES FOCUS LOCATION OF EUROBODALLA AND BEGA

$100m
Private residential and commercial development

$50m
Invested into regional tourism infrastructure

$24m
Investment into TAFE facilities

$260m
Eurobodalla Regional Hospital

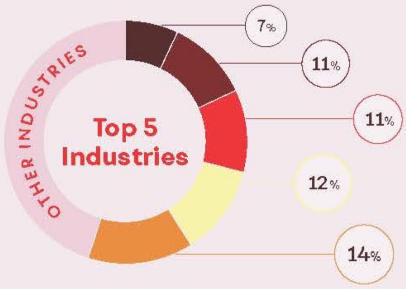


- 🟥 9% Accommodation
- ■ 9% Agriculture
- 🟧 9% Healthcare
- ■ 10% Professional services
- 🟨 20% Construction

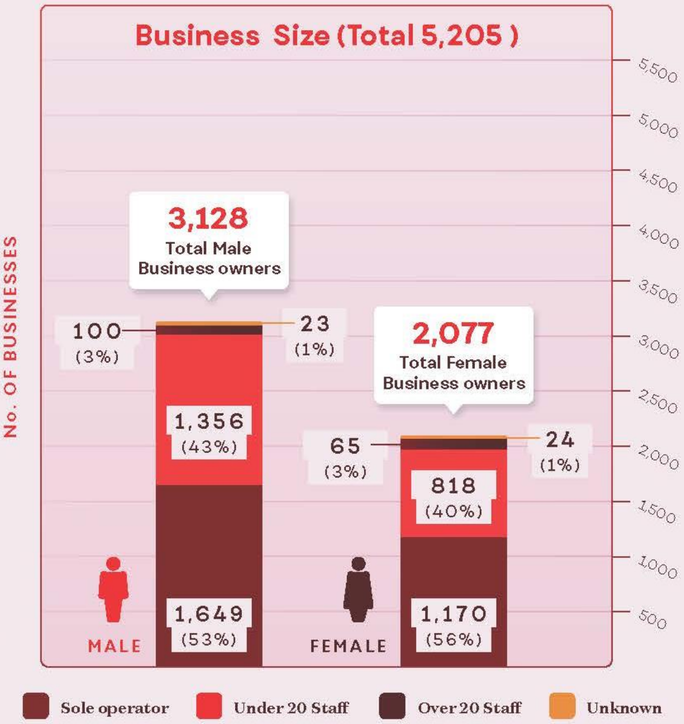
KEY REGIONAL ISSUES

- Housing availability & affordability
- Building resilience after natural disasters
- Complex impacts of remote working

2,077 female business owners



- ■ 7% Agriculture
- ■ 11% Professional services
- 🟥 11% Retail
- 🟨 12% Accommodation
- 🟧 14% Healthcare



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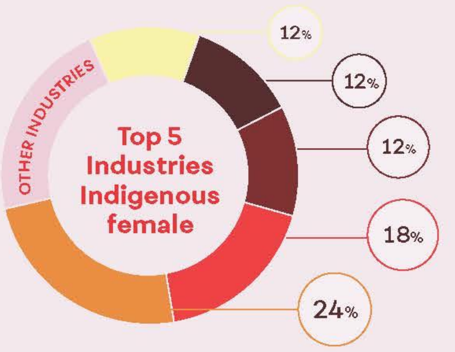
34 female Indigenous business owners



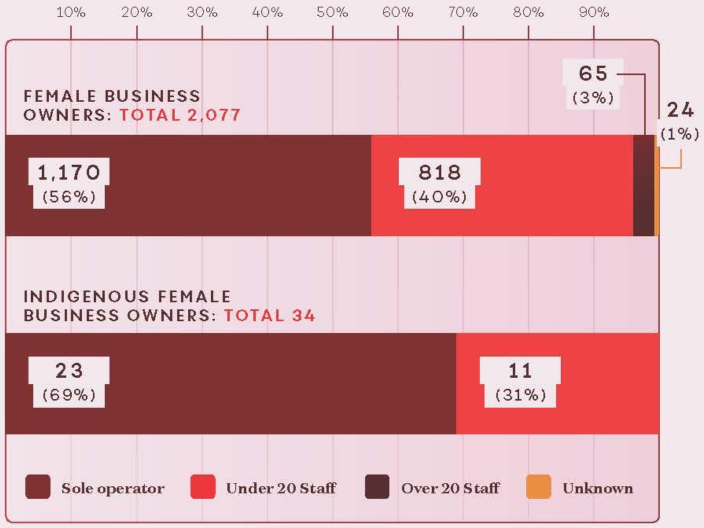
- 🟨 12% Arts & recreation
- ■ 12% Transport
- ■ 12% Administrative
- 🟥 18% Retail
- 🟧 24% Healthcare

Representation as business owners:

Indigenous female population vs business ownership

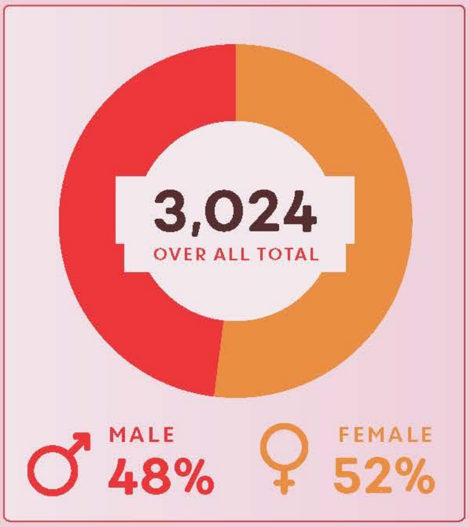
Indigenous women are 4.03% of the overall female population but only **1.6%** of female business owners.

BUSINESSES OWNERS: FEMALE VS INDIGENOUS FEMALE

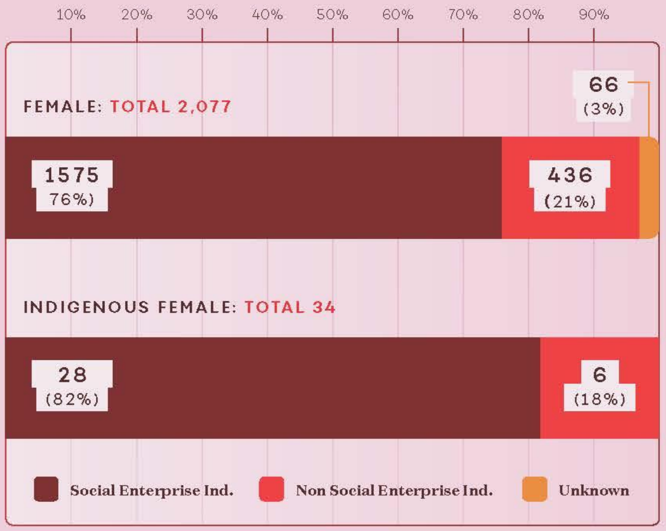


BREAKDOWN: Ownership of businesses in key social enterprise industries

BUSINESSES IN KEY SOCIAL ENTERPRISE INDUSTRIES MALE VS FEMALE



BUSINESSES IN KEY SOCIAL ENTERPRISE INDUSTRIES FEMALE VS INDIGENOUS FEMALE



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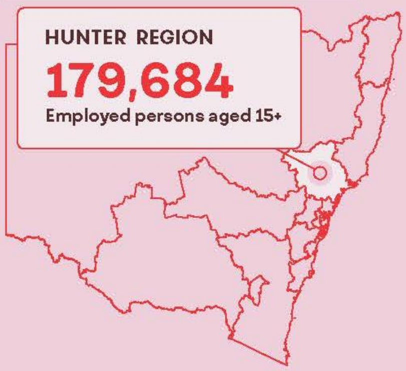
4.2. HUNTER

REGIONAL SNAPSHOT



HUNTER REGION

179,684

Employed persons aged 15+

20,091
Business owners

Indigenous business owners **477**

7,608
female business owners

13,588
Businesses in key social enterprise industries

Regional Economic Development Strategy Zone: Hunter

$25b
Size of Economy

ZONE INCLUDES FOCUS LOCATION OF NEWCASTLE & LAKE MACQUARIE

The Hunter-Renewable Energy Zone

$25m
Development of a future defence and aerospace hub

Transport infrastructure projects

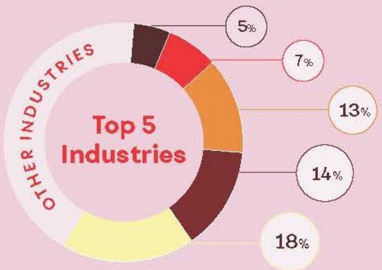
$835m
Maitland Hospital Redevelopment

KEY REGIONAL ISSUES

Diversification that benefits all

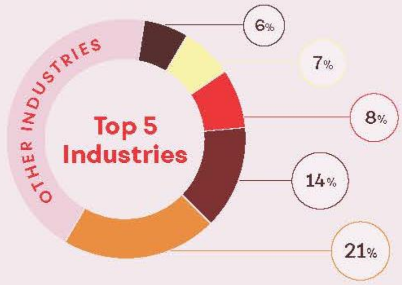
A growing and changing region

Leveraging existing strengths

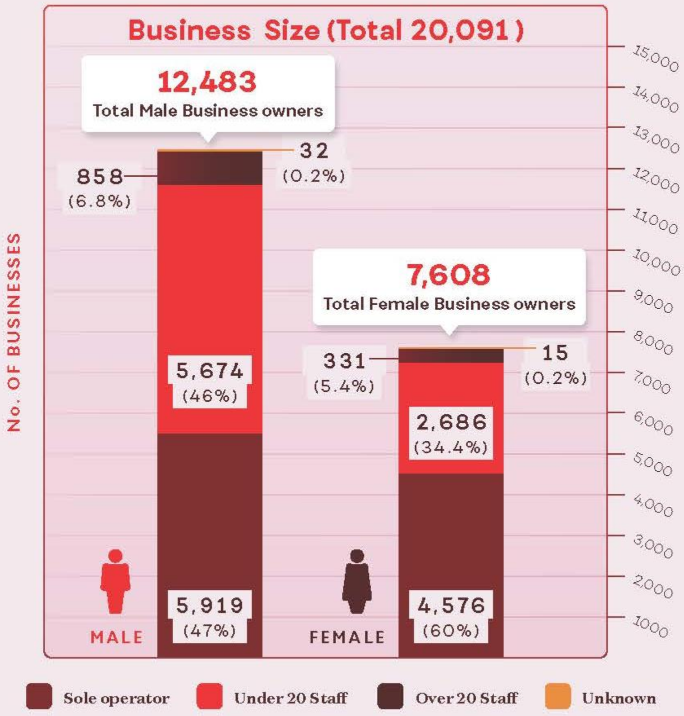


- ■ 5% Administrative
- 🟥 7% Retail
- 🟧 13% Healthcare
- ■ 14% Professional services
- 🟨 18% Construction

7,608 female business owners



- ■ 6% Administrative
- 🟨 7% Education
- 🟥 8% Retail
- ■ 14% Professional services
- 🟧 21% Healtcare



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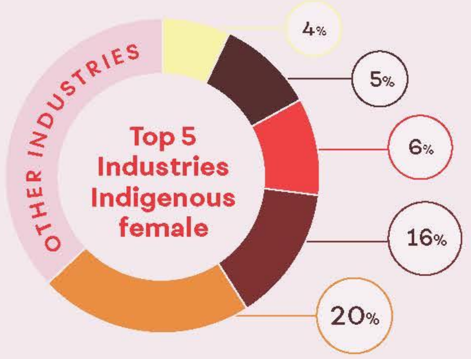
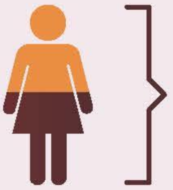
168 female Indigenous business owners



- 🟨 4% Construction
- ■ 5% Education
- 🟥 6% Retail
- ■ 16% Professional services
- 🟧 20% Healthcare

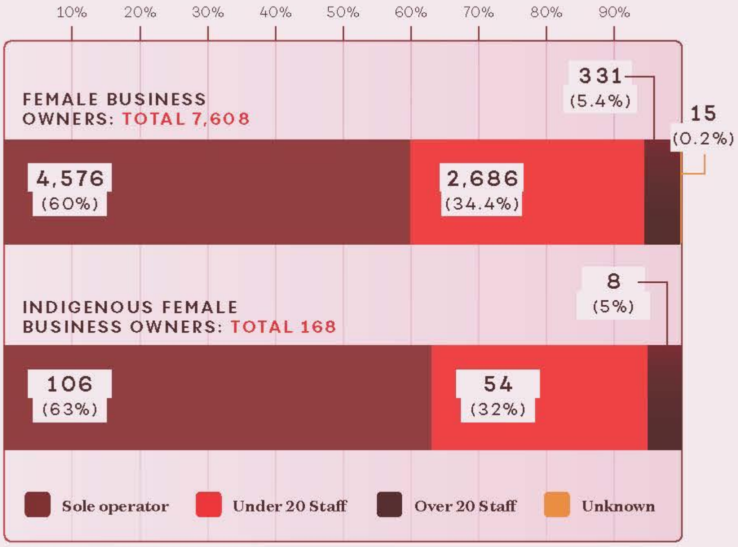
Representation as business owners:

Indigenous female population vs business ownership



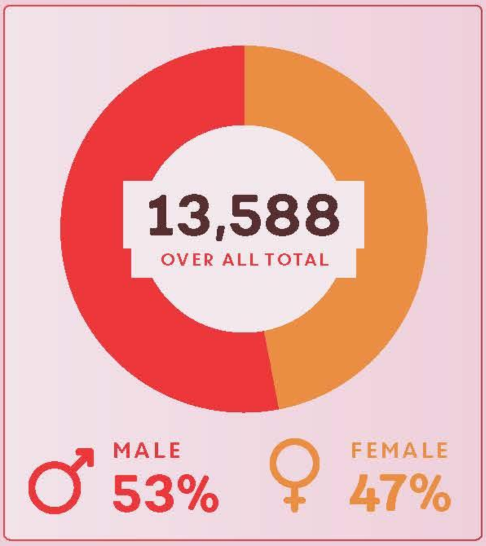
Indigenous women are **4.37%** of the overall female population but only **2.2%** of female business owners.

BUSINESSES OWNERS: FEMALE VS INDIGENOUS FEMALE

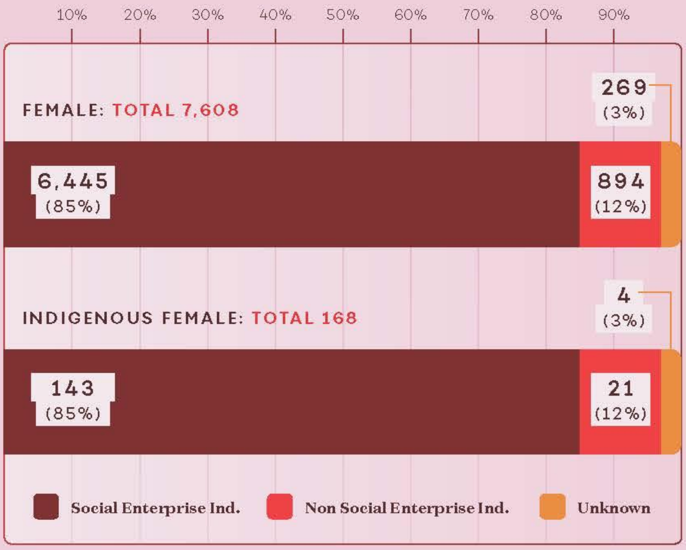


BREAKDOWN: Ownership of businesses in key social enterprise industries

BUSINESSES IN KEY SOCIAL ENTERPRISE INDUSTRIES MALE VS FEMALE



BUSINESSES IN KEY SOCIAL ENTERPRISE INDUSTRIES FEMALE VS INDIGENOUS FEMALE



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5. References

Department of Regional NSW, February 2023, Coffs Coast Regional Economic Development Strategy – 2023 Update

Department of Regional NSW, February 2023, Northern Rivers Regional Economic Development Strategy – 2023 Update

Department of Regional NSW, February 2023, Shoalhaven Regional Economic Development Strategy – 2023 Update

Queensland Council of Social Service, 2019. Place-based approaches for community change: QCOSS' guide and toolkit. West End, Qld

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