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# Employment Lands Strategy 2016



GOULBURN  
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# 1 INTRODUCTION

Preparation of the Goulburn Mulwaree Employment Lands Strategy (Strategy) for employment lands has been initiated as a priority to inform a review of local planning provisions and land zoning and to inform Council’s strategic marketing activities. It will guide future decision making by Council and other stakeholders within the Goulburn Mulwaree Local Government Area (LGA) by:

- Assessing the availability and demand for employment lands;
- Considering the drivers for economic growth and emerging industries;
- Establishing a strategy upon which to consider future amendments to the Goulburn Mulwaree Local Environmental Plan 2009 and the Goulburn Mulwaree Development Control Plan 2009; and
- Integrating planning analysis to support the marketing activities of Council.

The Strategy recognises the key role employment lands play in facilitating the economic development of the region and thus promoting the role of Goulburn as a major regional centre within New South Wales (NSW).

The availability and distribution of employment lands is a major factor in determining whether a region is efficiently accommodating the economic growth of existing and future industries. As such, a focussed and long term strategy for identifying appropriate land for employment purposes and determining the most efficient method for implementing the release of this land is required.

Goulburn Mulwaree Council is committed to providing this robust Strategy to underpin the growth of the LGA and to ensure there are adequate and appropriate employment lands to provide for sustainable growth into the future.

## 1.1 STRUCTURE

The Strategy has been developed in two distinct parts:

- A **Recommendations Report** which contains the future directions for employment lands and recommendations; and
- A **Background Report** which documents the locational context of the LGA and a literature review.

## 1.2 EMPLOYMENT LANDS

Employment land is land which is zoned to accommodate activities resulting in employment. This includes land zoned for retail, commercial and industrial purposes. Agriculture is important to the economic prosperity of Goulburn Mulwaree, however, given the proliferation of agricultural land across the LGA and the low percentage of employment generated, agricultural land is not addressed in this Strategy. Council intends to undertake a study into Agricultural and Primary Industry Lands as part of its 2 year strategic planning work program.

Table 1 below identifies the key employment precincts and sub-precincts within the Goulburn Mulwaree LGA.

**Table 1: Key Employment Precincts**

Land Use Designation	Precinct	Sub-Precinct
Retail and Commercial	Goulburn CBD	<ul style="list-style-type: none"> <li>Goulburn CBD Retail &amp; Commercial – Commercial Core</li> <li>Goulburn CBD Retail &amp; Commercial – Mixed Use</li> </ul>
	Mary’s Mount Retail & Commercial	N/A
	Marulan Retail & Commercial	N/A
Enterprise Corridor	South Goulburn	<ul style="list-style-type: none"> <li>Ducks Lane Enterprise Corridor</li> <li>Lockyer Street/Sowerby Street Enterprise Corridor</li> <li>Hume Street Enterprise Corridor</li> <li>Mary Street Enterprise Corridor</li> </ul>
	East Goulburn	<ul style="list-style-type: none"> <li>Common Street Enterprise Corridor</li> <li>North Common Street Enterprise Corridor</li> <li>Sydney Road Enterprise Corridor</li> <li>Hetherington Street Enterprise Corridor</li> </ul>
	Marulan Enterprise Corridor	N/A
Industrial Zones	Tarago Industrial	N/A
	South Goulburn	<ul style="list-style-type: none"> <li>Tait Crescent Industrial</li> <li>Sale Yards Industrial</li> <li>Rail Yards Industrial</li> </ul>
	North Goulburn Industrial	N/A
	Bradfordville Industrial Estate	<ul style="list-style-type: none"> <li>Bradfordville Industrial Estate</li> <li>Taralga Road Industrial</li> </ul>
	Murray’s Flat Industrial	N/A
	Marulan	<ul style="list-style-type: none"> <li>Portland Ave/Wilson Drive Industrial</li> <li>West Industrial Marulan</li> <li>Suffolk Road Industrial</li> </ul>

### 1.3 STAKEHOLDER ENGAGEMENT

The process of developing the Strategy so far has involved comprehensive stakeholder engagement, which has been prioritised by Council to support capacity building between Council and Goulburn Mulwaree’s business community. The stakeholder engagement process and the results are explained and analysed in the Recommendations Report.

Following endorsement by Goulburn Mulwaree Council on the 16th August 2016, the draft Strategy was placed on public exhibition from Thursday 25 August to Friday 30 September 2017 for feedback and comment. An Outcomes Report was prepared following the exhibition period which outlined the consultation process, summarised the submissions and provided a response to issues and concerns.

## 2 CONTEXT REVIEW

This section provides an overview of the state, regional and local context and the employment lands examined in this Strategy.

### 2.1 STATE & REGIONAL CONTEXT AND LINKS

The Goulburn Mulwaree Local Government Area is located in south-eastern NSW as shown in Figure 1 below.

Figure 1: Location of Goulburn Mulwaree LGA within NSW



Source: PSA Consulting Australia

#### 2.1.1 State Context

Goulburn Mulwaree is strategically located on the Hume Highway within the Sydney-Canberra Corridor Region in south-eastern New South Wales. The City of Canberra is 90km south west of Goulburn via the Hume/Federal Highways (M23); Sydney CBD is located 196km (approx. 2 hours drive) to the north east via the Hume Highway (M31) with Wollongong (and Port Kembla) 152km to the east.

#### 2.1.2 Regional Context

Goulburn Mulwaree is located in the Sydney-Canberra Corridor which is a collection of three sub-regions including the northern (Wingecarribee LGA); central (Goulburn Mulwaree and Upper Lachlan LGAs); and southern (Queanbeyan

Palerang and Yass Valley LGAs). The major regional centres within the corridor include Goulburn, Bowral and Queanbeyan.

Goulburn Mulwaree is highly accessible with quality road and rail connections. Its location between Canberra and Sydney and quality road infrastructure gives easy access to the 12.6 million people living in the NSW/ACT/VIC coastal ribbon and their demand for consumer goods. Accessibility also creates significant opportunities for the establishment of a range of employment uses reliant on high quality transport connections and accessibility to domestic and international markets.

Figure 2 illustrates these and other connections which occur across the southern part of the State and identifies the main transport routes through the Goulburn Mulwaree LGA.

**ROAD** - The Hume and Federal Highways pass through the LGA and are the main freight and travel routes between Sydney, Canberra and Melbourne. Highway interchanges are located at the southern entrance to Goulburn and 3km to the south of Marulan village, facilitating access to several major quarries.

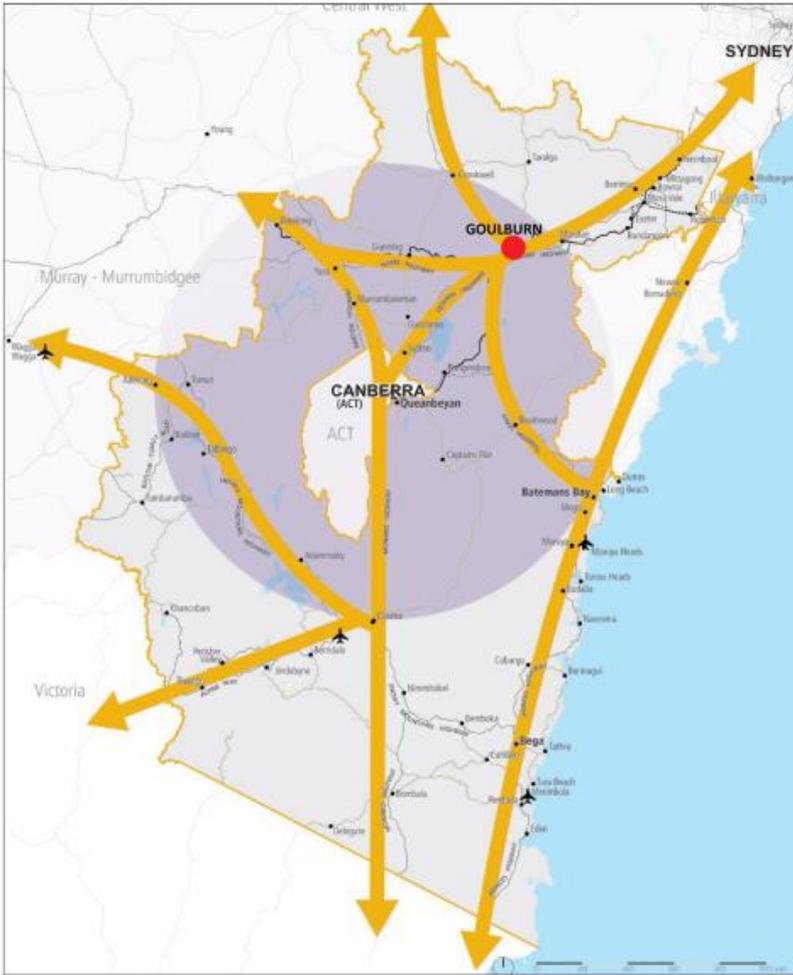
**RAIL** - The Great Southern Rail line passes through Goulburn. A proposal to develop a rail freight hub was approved by Council late in 2015, and is expected to be operational by mid-2016. This facility will provide rail freight links to the Ports of Melbourne, Botany and Kembla.

The Goulburn railway station is located on the eastern periphery of the CBD and provides three daily passenger services to and from Canberra, and four daily services to and from Sydney. The town of Marulan also has a railway station, and its location on the Hume Highway ensures there is good road and rail based connections through to Sydney and Goulburn. Other Goulburn Mulwaree villages with small railway stations include Tallong, Towrang and Tarago.

**AIR** - Goulburn has a registered aerodrome approximately 7km south-east of the city, which is available for both recreational and commercial purposes. Canberra Airport, located 90km to the south-west, currently offers domestic passenger flights, but has recently announced a partnership with Singapore Air commencing in September 2016 which will see the commencement of international passenger and airfreight services. The development of Sydney's second airport at Badger's Creek, under 162km to the north will increase transport connectivity and increase the attractiveness of the region to freight-dependent industries.

**PORTS** – Port Botany is located 190km to the north-east and Port Kembla 138km to the east; both have good road connections from the Local Government Area. The development of the rail freight hub will also provide direct rail access to both ports.

Figure 2: Transport Connections Map

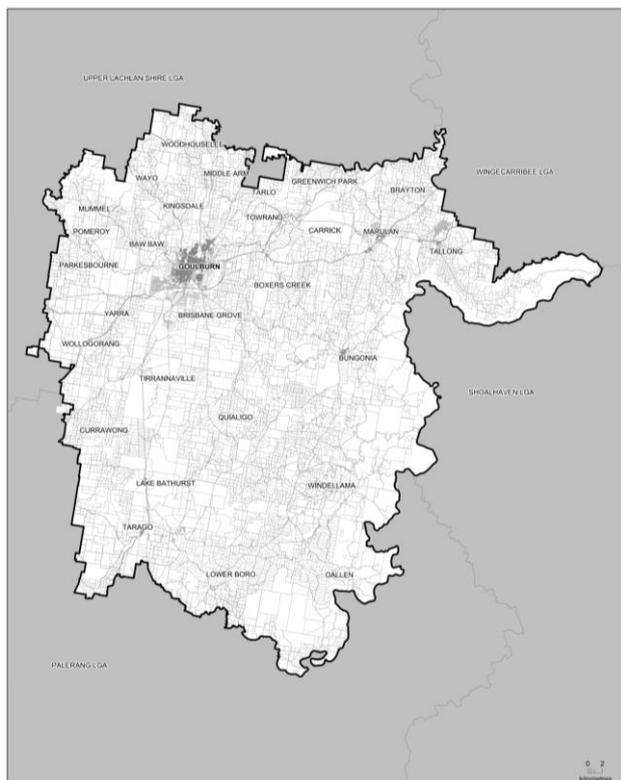


Source: PSA Consulting Australia & Southern Regional Transport Plan

### 2.1.3 LOCAL AREA CONTEXT

Goulburn Mulwaree LGA covers an area of 3,223 square kilometres and includes the major regional centre of Goulburn, the town of Marulan as well as a number of smaller villages including Tallong, Windellama, Tarago, Towrang, Parkesbourne, Tirranaville, Lake Bathurst and Bungonia. The Employment Land Precincts are located in Goulburn, Marulan and Tarago. Figure 3 provides an overview of the Goulburn Mulwaree LGA.

Figure 3: Location of Towns and Regional Centre of Goulburn Mulwaree LGA



Source: PSA & Goulburn Mulwaree LEP– Land Application Map

Goulburn Mulwaree LGA accommodates a population of 29,550 people (ABS\_ 2015) with a steady average annual growth rate of 1-1.5%. The region’s economic base has historically been comprised of agriculture, grazing and commerce, given its central location within the region. Over more recent decades, the economy has transitioned to a broader base with the top three sectors by employment being Health Care & Social Assistance (14%); Retail Trade (13%) and Public Administration & Safety (11%). By current figures, only 3.2% of the Goulburn population is employed within the Agriculture, Forestry & Fishing sector.

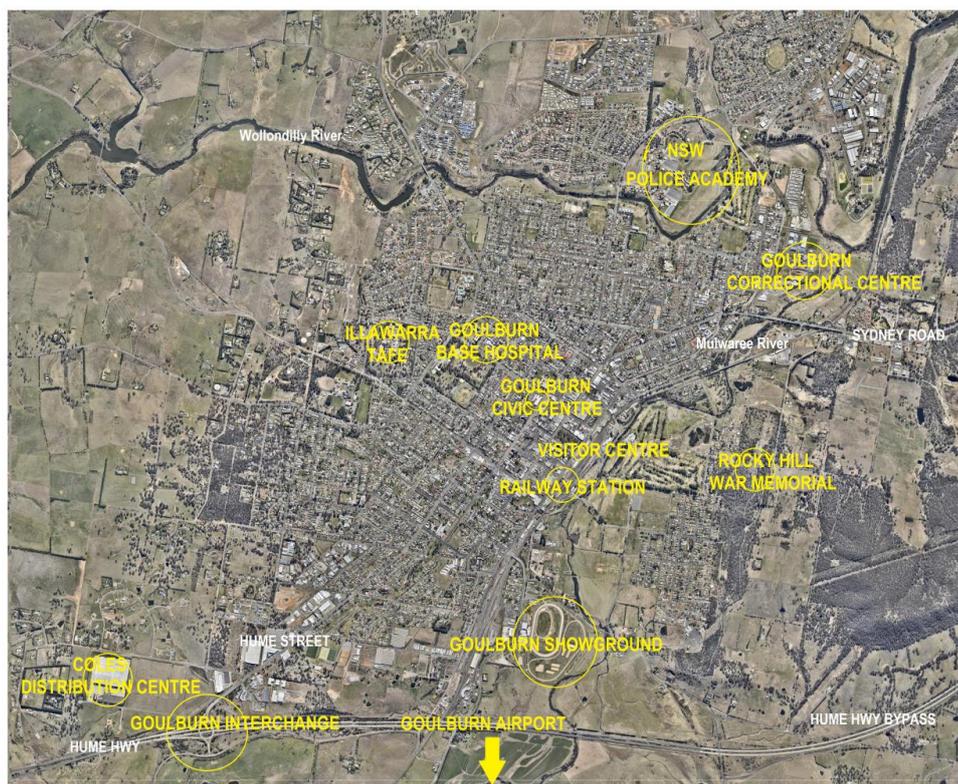
According to 2011 Census data, 70% of households within the Goulburn Mulwaree LGA are families with a 68% home ownership rate. The relative socio-economic profile across the LGA is comparable with other regional NSW LGAs with similar population numbers.

A more detailed demographic and economic analysis of the LGA can be found within the Recommendations Report.

### 2.1.3 Goulburn

Goulburn is a major centre for the region and the primary service centre for the Goulburn Mulwaree LGA. It is located to the north of the LGA. **Figure 4** illustrates a number of landmarks within Goulburn.

Figure 4 Map of Goulburn Context



Source: PSA Consulting Australia & Google Maps

The city is flanked to the north by the Wollondilly River and to the south-east by the Mulwaree River.

The Hume Highway bypassed Goulburn in 1992, redirecting traffic along the eastern boundary of the city. Access into Goulburn from the north is via Sydney Road and from the south via Hume Street. The southern interchange with the Hume Highway represents a focus for economic activity utilising and benefiting from direct access to the highway.

Goulburn has a population of 22,796 people and provides several major government and private facilities with health, education and correctional services contributing significantly to employment. The Government facilities include the Goulburn Correctional Centre, the NSW Police Academy, Goulburn Base Hospital and the Illawarra Institute of Technology (TAFE).

The CBD covers five city blocks from Clinton Street in the south through to Bradley Street in the north. The main street is Auburn Street running north-south, which is flanked by Bourke Street running parallel to the west and Sloane St running parallel to the east. Many buildings within Goulburn, including within the CBD, are historically significant with several buildings being individually heritage listed and the area being included in the heritage conservation area in the Goulburn Mulwaree Local Environmental Plan.

A major drawcard of the CBD is the public recreation space including Belmore Park. Additional features include wide streetscapes, historical facades, parking convenience and a diversity of retail offer spanning speciality, supermarkets and department stores.



The photographs show a number of the heritage listed buildings located along Auburn Street.

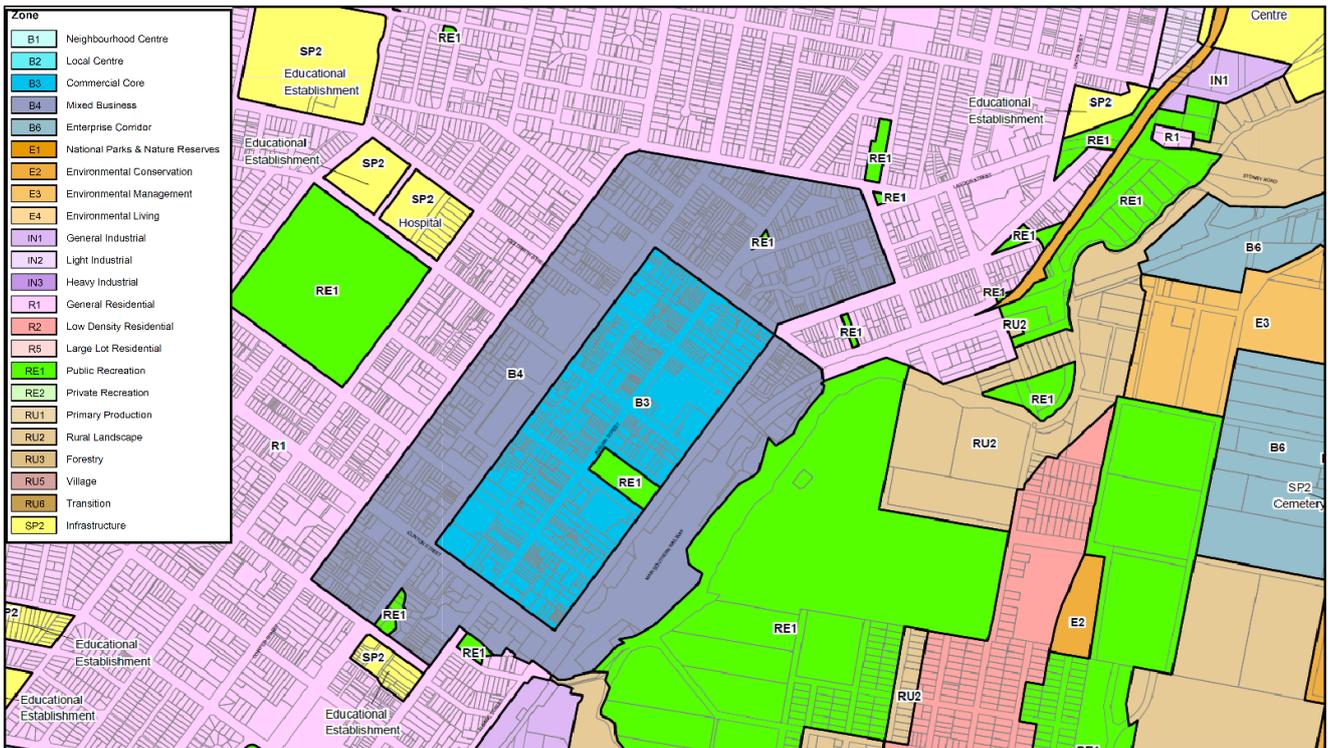
The area defined as the CBD is recognised as an opportunity with significant capacity for employment generation appropriate to a CBD including accommodation, retailing, commercial and professional services. The significant historic values of the buildings and CBD in general can potentially serve as both an opportunity to support tourism or other industries and at the same time, represent a challenge to meeting contemporary building standards and expectations in historic buildings.



Source: PSA Consulting

The zoning for the Goulburn CBD is shown in Figure 5.

Figure 5 Goulburn CBD Zoning



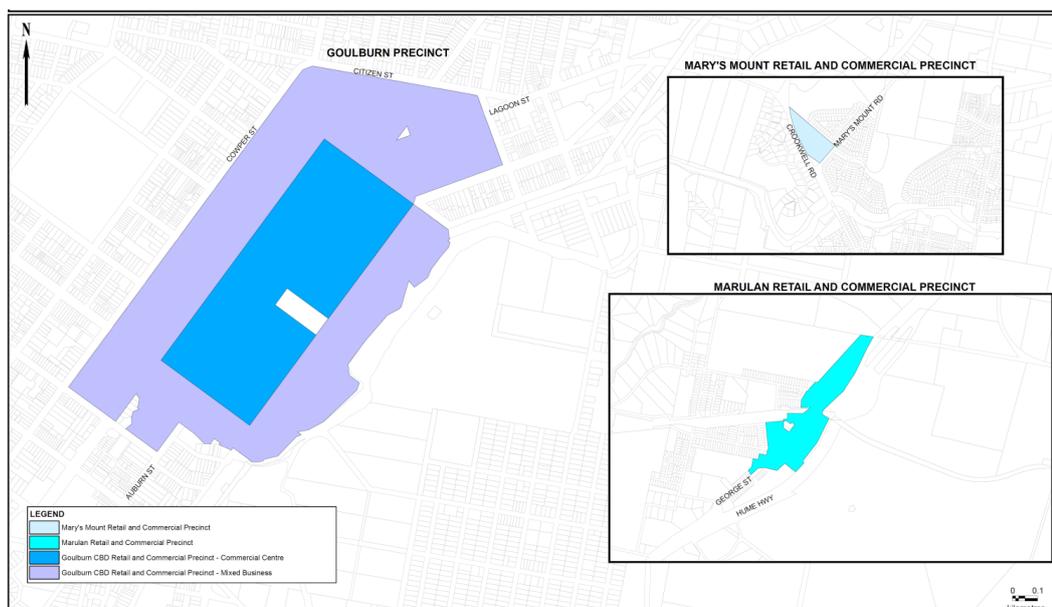
Source: Goulburn Mulwaree LEP 2009 Map Sheet LZN\_001D & PSA Consulting Australia

### 2.1.3.1 Goulburn Retail and Commercial Precincts

The Goulburn CBD, B3 Commercial Core supports a range of retail and commercial land uses and is the largest concentration of such uses within the LGA. The Mixed Business zone, B4 Mixed Use supports more commercial and residential uses in order to continue to encourage a concentration of retail and accommodation uses within the commercial core of the CBD.

To the north of the CBD is the Mary’s Mount Retail and Commercial Precinct, zoned Neighbourhood Centre. This area is subject to an existing approval for a neighbourhood shopping centre. Marulan is located to the north east of Goulburn and consists of a small retail and commercial area. Figure 6 shows the retail and commercial areas.

Figure 6 Goulburn Retail and Commercial Precinct - Map of Sub-Precincts (Mary’s Mount and Marulan Precincts Inset)



Source: PSA Consulting Australia

### 2.1.3.2 Goulburn Enterprise Corridor Precincts

The areas within Goulburn zoned B6 Enterprise Corridor are illustrated in Figure 7. These zones are separated into precincts and sub-precincts.

The two B6 Enterprise Corridor Zones (South Goulburn Precinct and East Goulburn Precinct and sub-precincts) located within Goulburn are at the southern and eastern periphery of Goulburn. The area at the southern end of Goulburn has an emerging concentration of bulky goods retailers and some manufacturing at the interchange with the Federal Highway. The other Enterprise Corridor Precinct is located at the eastern entrance to Goulburn bisected by Sydney Road.

A number of sub-precincts have been identified within each Enterprise Corridor Precinct in Goulburn (Figures 8 & 9). The South Goulburn Enterprise Corridor Precinct is comprised of four sub-precincts. These include the Ducks Lane Enterprise Corridor Sub-Precinct; the Lockyer Street/Sowerby Street Enterprise Corridor Sub-Precinct; the Hume Street Bulky Goods Enterprise Corridor Sub-Precinct; and the Robinson Street Enterprise Corridor Sub-Precinct.

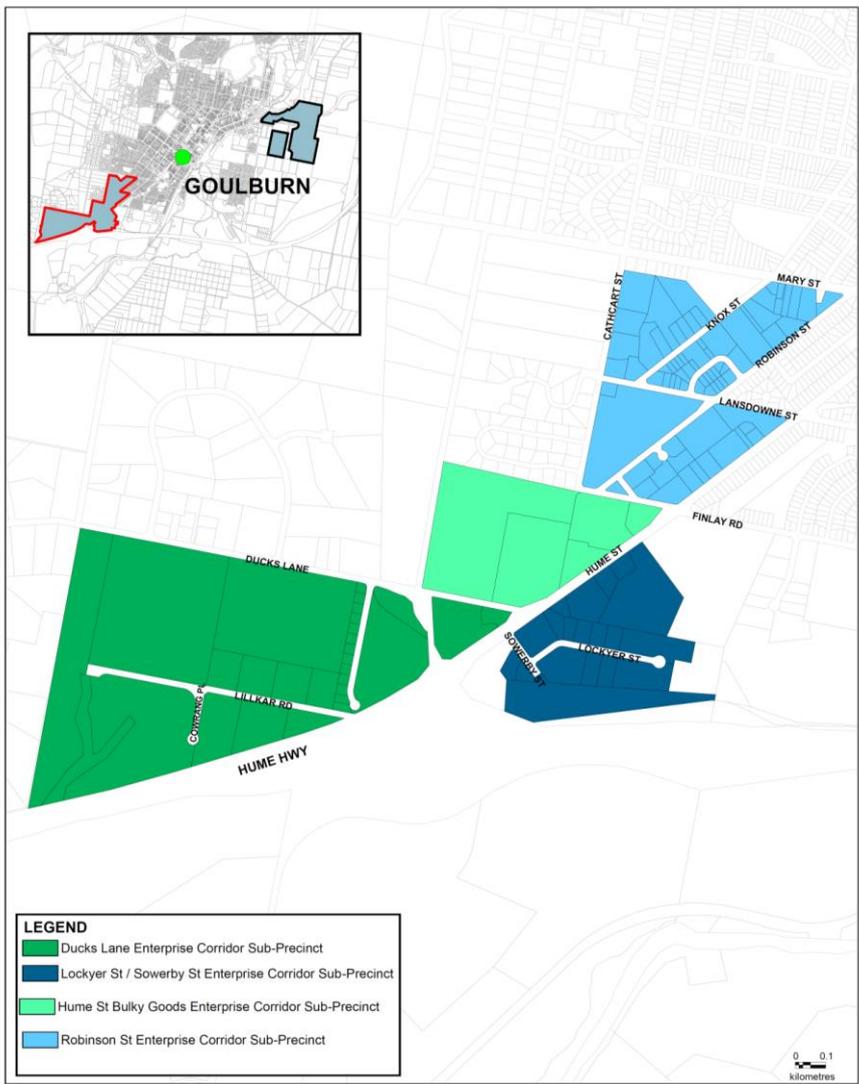
A further four sub-precincts are identified within the North-East Goulburn Enterprise Corridor Precinct. These sub-precincts include the North Common Street Enterprise Corridor Sub-Precinct; the Hetherington Street Enterprise Corridor Sub-Precinct; the Sydney Road Enterprise Corridor Sub-Precinct and the Common Street Enterprise Corridor Sub-Precinct. The range of land uses within these sub-precincts varies from bulky goods and retail hire services to service centres and fast food stores.

Figure 7 Enterprises Corridor Zones across Goulburn – including precincts



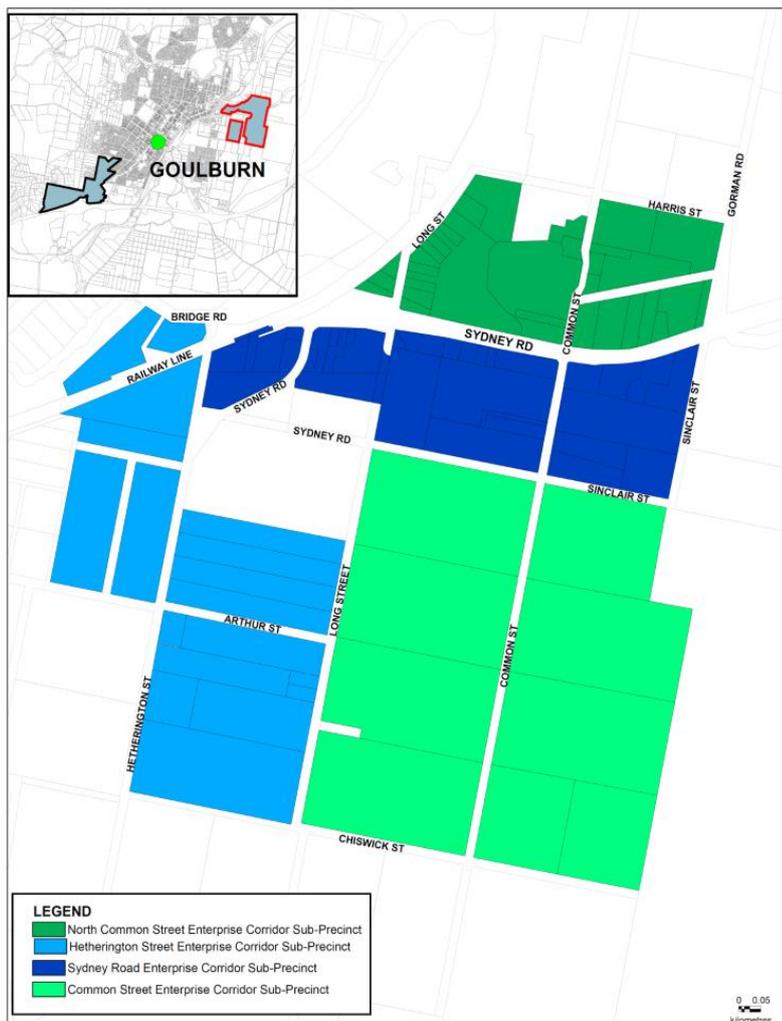
Source: PSA Consulting Australia

Figure 8 : South Goulburn Enterprise Corridor Precinct – Map of Sub-Precincts



Source: PSA Consulting Australia

Figure 9: East Goulburn Enterprise Corridor Precinct – Map of Sub-Precincts



Source: PSA Consulting Australia

### 2.1.3.3 Goulburn Industrial Precincts

Industrial Precincts are located in the south, north and north-east of the city, and are described as the South Goulburn, the North Goulburn, the Bradfordville Industrial Estate and Murrays Flat Precincts.

Figure 10 below illustrates the location of each Industrial Precinct across the Goulburn Mulwaree LGA. Maps 2, 3, 4, and 5 shown below are Industrial zones located within Goulburn. Map 1 shown below, illustrates industrial zoned land at Tarago, while Maps 6 and 7 illustrate the Marulan and South Marulan industrial zoned land. These precincts are described in more detail in the following sections.

Existing industrial precincts developed at different times and are dispersed around Goulburn, other centres and along major transport routes. The analysis of the zoning and location indicates that there is a level of focus for each precinct, with each tending to serve different functions within the economy of Goulburn.

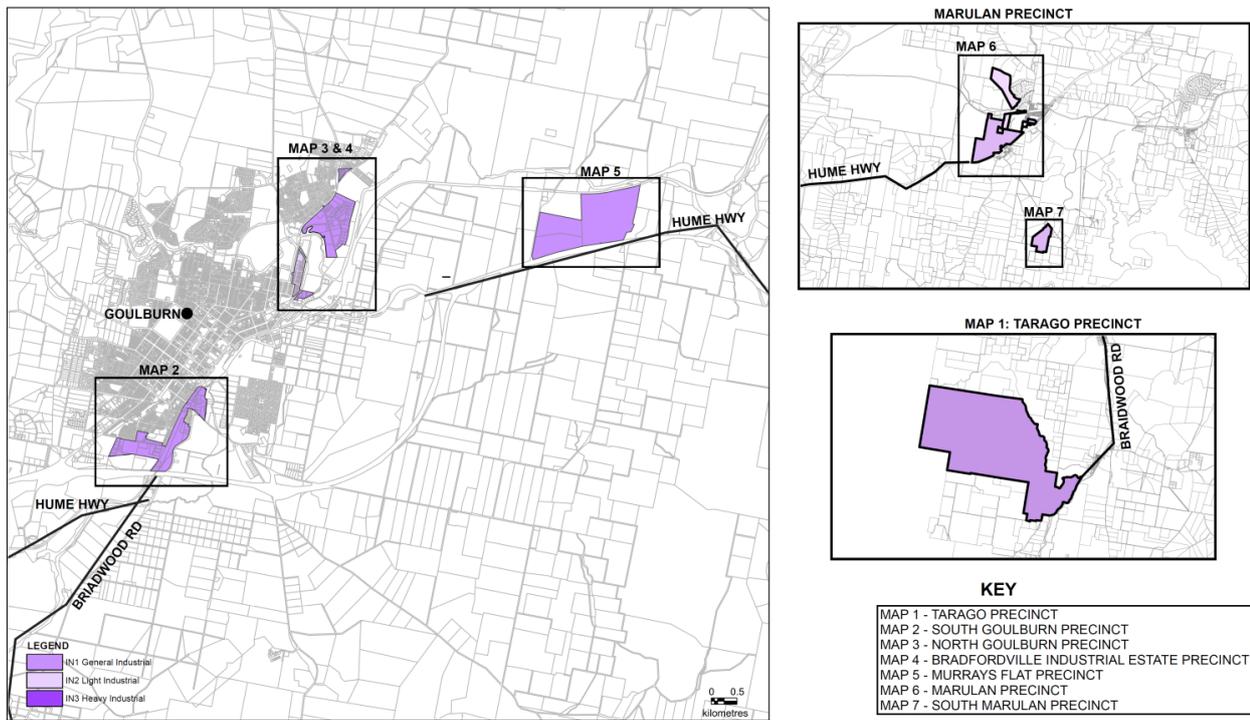
A number of sub-precincts have been identified within each industrial precinct. Within the South Goulburn industrial precinct there is the Tait Crescent Industrial Sub-Precinct, the Sale Yards Industrial Sub-Precinct and the Rail Yards Industrial Sub-Precinct. Industrial land uses within these sub-precincts vary from vehicle sales and bulky goods/retail to storage, service centres and engineering.

The North Goulburn Industrial Precinct is opposite the Goulburn Correctional Centre, and is comprised of smaller lots and a mix of residential uses and light and general industrial uses.

The Bradfordville Industrial Estate Precinct includes the Bradfordville Industrial Estate Sub-Precinct and the Taralga Road Industrial Sub-Precinct. The Bradfordville Industrial Estate Precinct consists of larger lots and larger industrial buildings with a mix of land uses ranging from storage sheds to waste treatment companies. (The Taralga Road Industrial Precinct is a small industrial zone further north of the Bradfordville Industrial Estate and consists of smaller lots along Taralga Road, which the main road is leading out of Goulburn to the north-west).

The Murray’s Flat Industrial Precinct is a large, currently undeveloped, industrial zone located on the north-east of Goulburn along the Hume Highway. It is comprised of three lots and no sub-precincts.

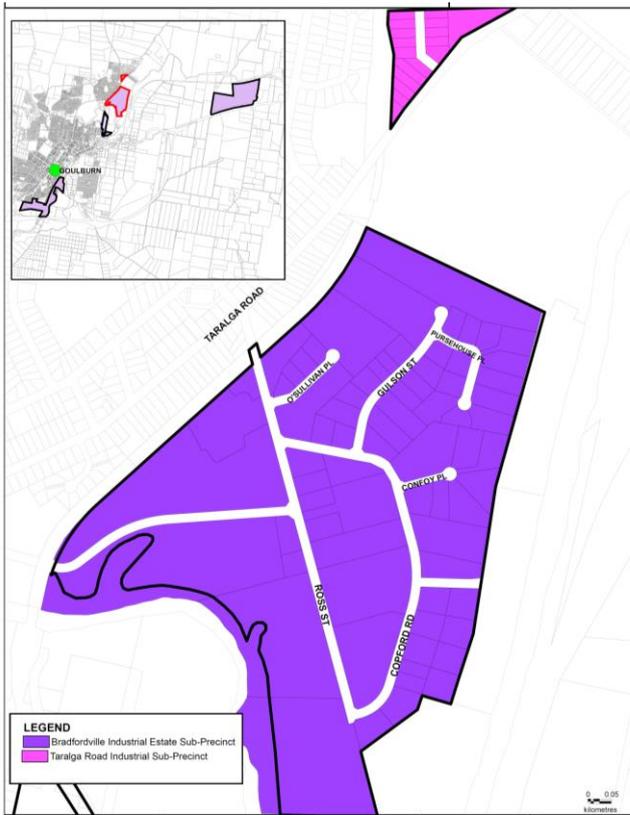
Figure 10: Overview of Industrial Zones across Goulburn Mulwaree LGA



Source: PSA Consulting Australia

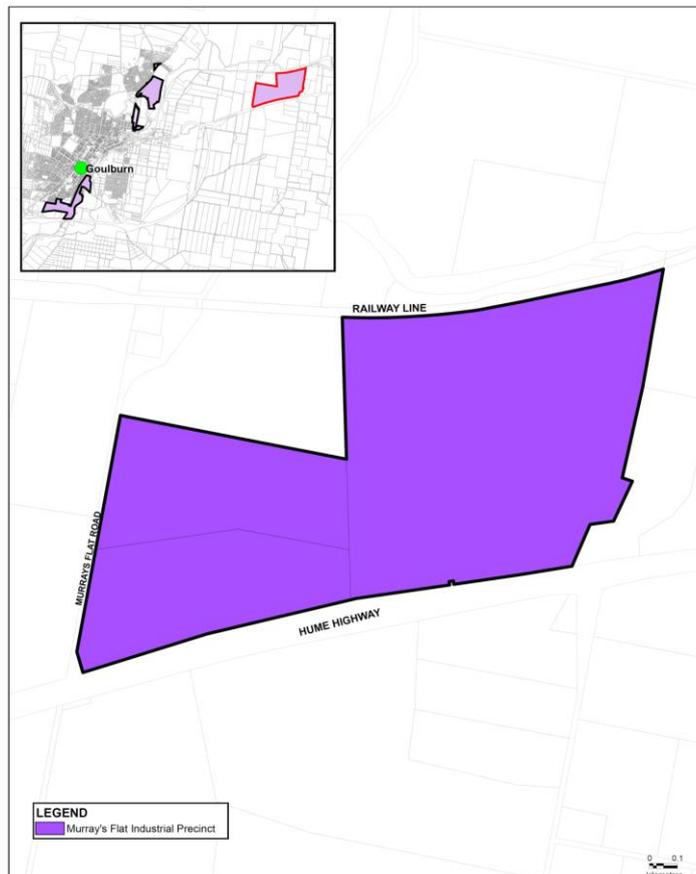


Figure 13: Bradfordville Industrial Precinct – Map of Sub-Precincts



Source: PSA Consulting Australia

Figure 14: Murrays Flat Industrial Precinct – Map of Sub-Precincts



Source: PSA Consulting Australia

## 2.1.4 Marulan

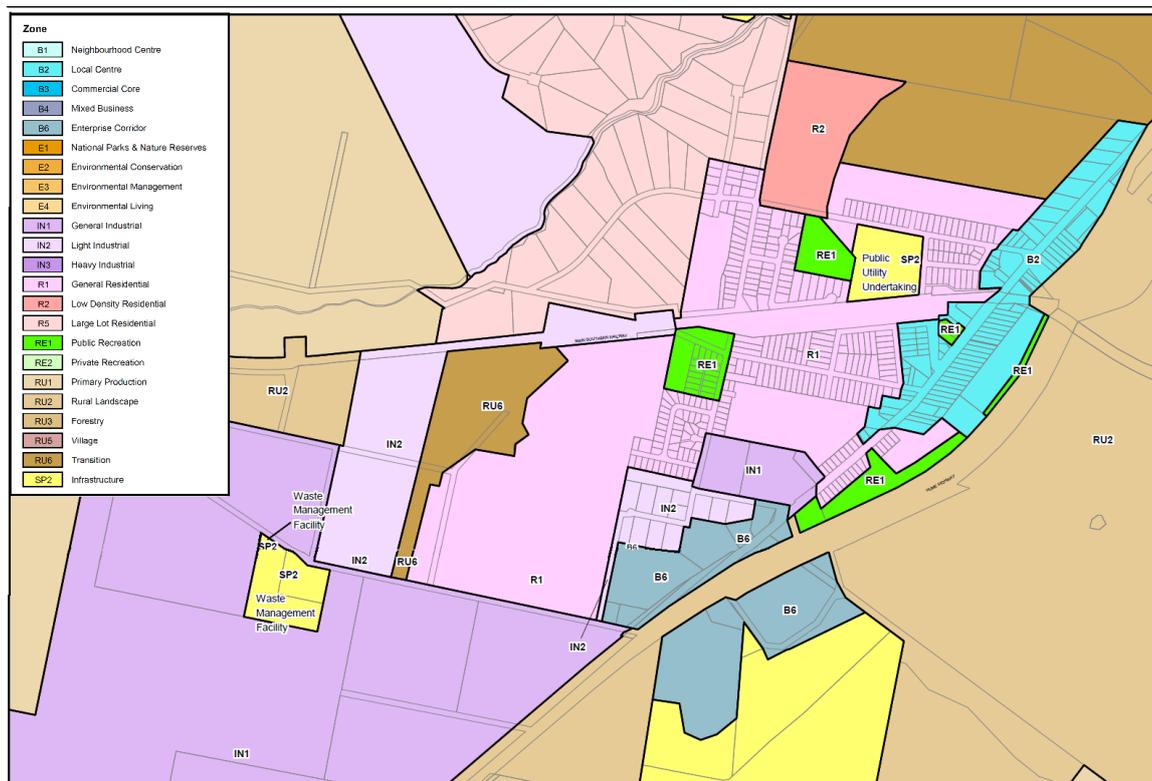
Marulan is located approximately 30km north of Goulburn towards Sydney along the Hume Highway. The Great Southern Railway Line passes through the town which has a staffed railway station with passenger rail services at similar frequencies to Goulburn Railway Station. The town of Marulan accommodated a population of 1,382 people as at the 2011 Census.

Several quarries, including hard rock and limestone, are located in the area surrounding the town. The limestone resources are recognised as significant to Australia’s steel production, providing limestone to the Port Kembla Steel Works 130km to the north-east, and for general cement manufacture. Hard rock is extracted from quarries surrounding Marulan, supplying the Sydney construction industry. There are fuel stations located within the town, as well as along the Hume Highway to service trucks travelling north and south.

The recent increase in quarrying, while driving economic activity within Marulan, has placed the community and local infrastructure, in particular haulage routes, under increasing pressure.

Marulan town centre is comprised of several different zones including a significant General Residential zone located directly west of the main street (George Street) and a substantial Large Lot Residential zone located to the north-west of the main street. The north-western extent of the main street of Marulan is a B2 Local Centre zone. A zoning map is shown below for illustrative proposes. Recognising the small population, it is noted that the precincts within both the Enterprise Corridor zones and the Industrial zones have developed around providing local service based enterprises and land for activities and business which support the quarrying activity.

Figure 15: LEP Zoning Map of Marulan

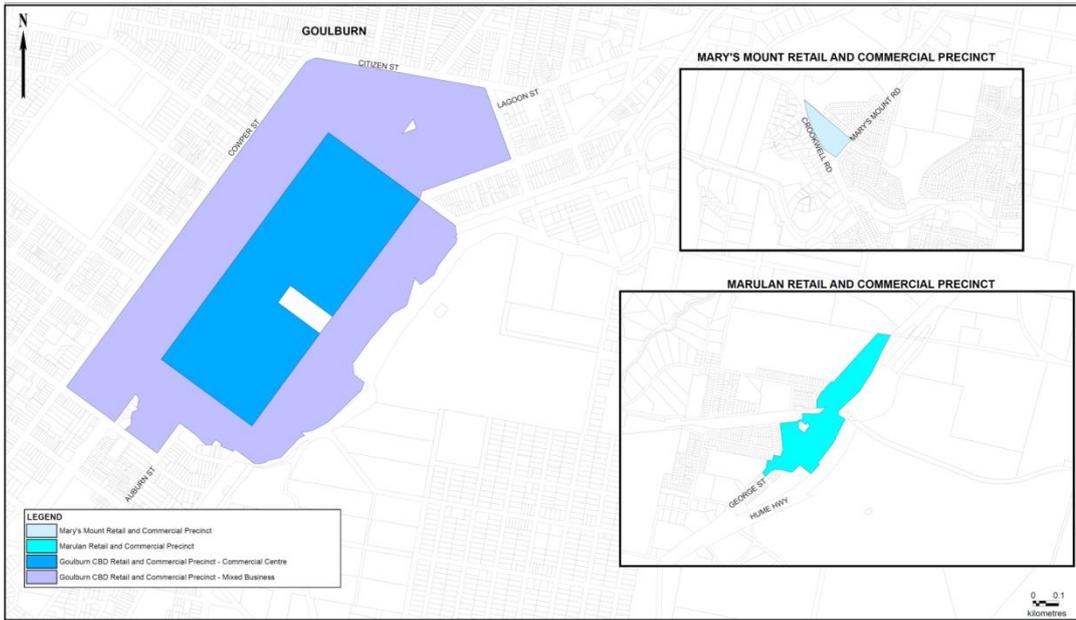


Source: PSA Consulting Australia

### 2.1.4.1 Marulan Retail and Commercial Precinct

There is one large retail and commercial Precinct located along George Street in Marulan. Land uses within this area are comprised of small retail outlets including a post office, café and bakery, as well as larger depots for trucks and service-based industries.

Figure 16: Marulan Retail and Commercial Precinct (inset)

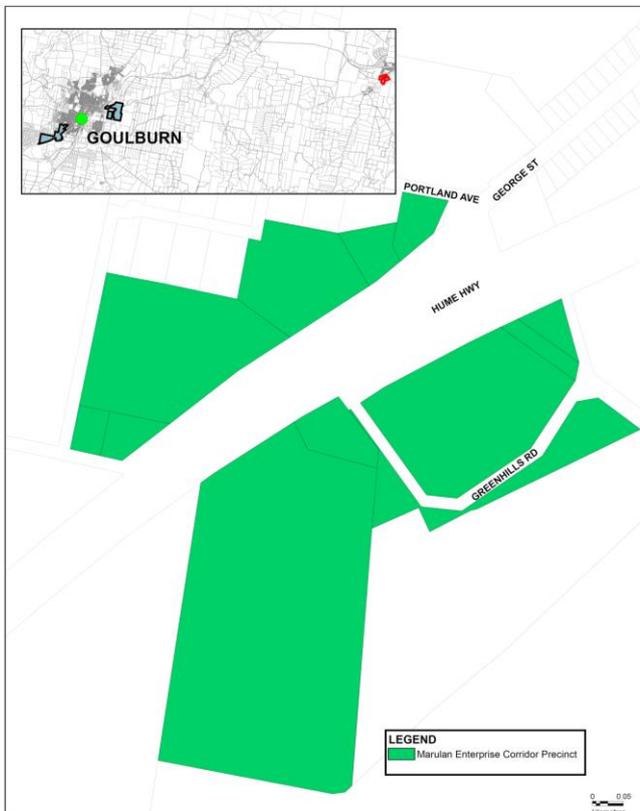


Source: PSA Consulting Australia

#### 2.1.4.2 Marulan Enterprise Corridor Zone

A B6 Enterprise Corridor zone is located at the southern entrance of the town from the Hume Highway. It comprises several petrol stations and fast food outlets. Figure 17 illustrates the Marulan Enterprise Corridor Precinct.

Figure 17: Marulan Enterprise Corridor Precinct

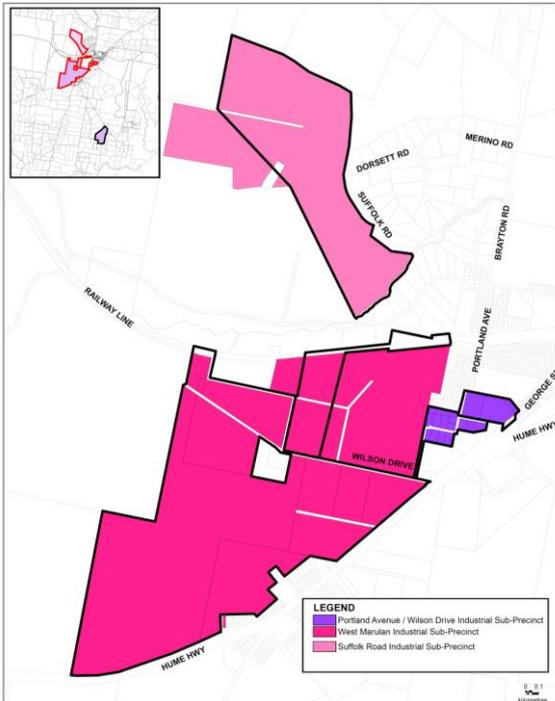


Source: PSA Consulting Australia

### 2.1.4.3 Marulan Industrial Precincts

General industrial and light industrial precincts are located both centrally within Marulan and in large areas to the north-west and west. There are three sub-precincts located within the Marulan Industrial Precinct. These include the Portland Avenue/Wilson Drive Industrial Sub-Precinct; the West Marulan Industrial Sub-Precinct and the Suffolk Road Industrial Sub-Precincts. Land uses across these sub-precincts range from quarries and Council’s waste management centre to storage sheds and service centres. Figure 18 illustrates the extent of this precinct.

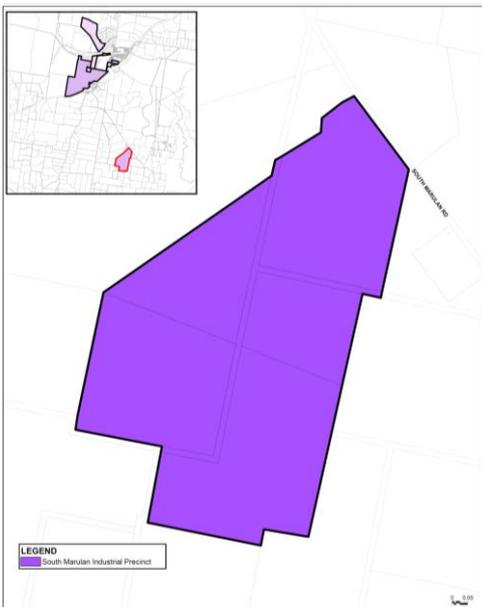
Figure 18: Marulan Industrial Precinct – Map of Sub-Precincts



Source: PSA Consulting Australia

South Marulan Industrial Precinct includes 2 lots and is located off South Marulan Road. Land uses in this precinct are associated with fireworks manufacture associated with fireworks manufacture.

Figure 19: South Marulan Industrial Precinct

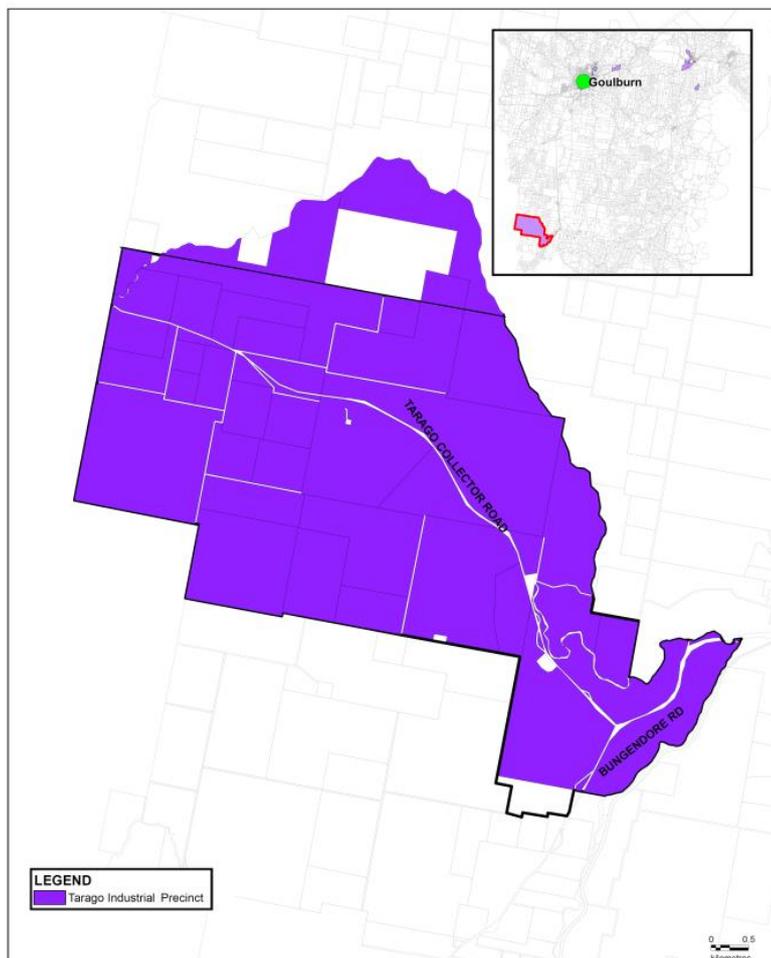


Source: PSA Consulting Australia

### 2.1.5 Tarago

Tarago is located in the south-west corner of the Goulburn Mulwaree LGA along Tarago/Braidwood Roads, approximately 37km (27 minutes) south from Goulburn. The areas of importance to this Employment Lands Strategy includes the IN3 Heavy Industrial zoned land located approximately 10km north-west of the village identified as the Tarago Industrial Precinct. There are a small number of commercial land uses within the main township area including a hotel with accommodation and a petrol station/service centre. **Figure 20** illustrates the Tarago Industrial Precinct.

**Figure 20: Tarago Industrial Precinct**



Source: PSA Consulting Australia

This precinct includes a repurposed open mineral mine used as a waste facility, operated by international environmental solutions company Veolia. Also within the vicinity of Tarago is the Woodlawn Wind Farm operated by Infigen and considered part of the broader *Capital Renewable Energy Precinct*. These areas provide employment for residents of Goulburn Mulwaree and may, if expanded, create additional employment into the future.

The extensive area of heavy industry reflects the area under mining activity and lease and the use of the site for renewable energy production through land fill management and wind farms. There are locational-specific uses for this precinct which require large, expansive sites.

## 2.2 KEY OPPORTUNITIES AND CHALLENGES IDENTIFIED FROM CONTEXTUAL ANALYSIS

Several opportunities and challenges have been identified as part of the contextual analysis of the LGA, from the perspective of creating demand for employment lands within Goulburn Mulwaree. These are presented in Table 2 below.

**Table 2: Key Opportunities and Challenges**

Key Opportunities		
Goulburn	Marulan	Tarago
Location on the Sydney - Canberra Corridor	Location on the Sydney - Canberra Corridor	Established railway station on Southern NSW Regional Rail Line
Located on the Great Southern Railway	Location on the Great Southern Railway	Distance from sensitive land uses
Proximity to the national highway network	Access to the Hume Highway	Proximity to Canberra
Hume Highway Interchange	Established quarrying and service industries	Established renewable energy industry
Size and extent of Goulburn CBD		Topography
Key Challenges		
Goulburn	Marulan	Tarago
Competition from population and economic concentrations in Canberra & Sydney	Competition from population and economic concentrations in Canberra & Sydney	Distance from state highways
Proximity to Sydney	Proximity to Sydney	Location of industrial land along Collector Road
Reuse of historic CBD buildings	Residential & quarrying interface – managing amenity Heavy Vehicle noise and dust	Topography

Source: PSA Consulting Australia

## 3 LITERATURE REVIEW

In this section, existing literature relevant to the development of Goulburn Mulwaree’s employment lands, is analysed and summarised to determine key opportunities and challenges to the future development of employment lands. The literature includes current statutory and strategic planning documents, as well as strategies and policies for local, regional and state economic development.

### 3.1 STATUTORY PLANNING DOCUMENTS

There are two pieces of legislation which provide the framework for planning in NSW including the *Environmental Planning and Assessment Act 1979* and the *Environmental Planning and Assessment Regulation 2000*. Further statutory documents, known as *Environmental Planning Instruments*, provide more practical tools for administering planning in NSW including the *State Environmental Planning Policies (SEPPs)* and *Local Environmental Plans (LEPs)*.

#### 3.1.1 Environmental Planning & Assessment Act 1979 and Environmental Planning & Assessment Regulations

The *Environmental Planning & Assessment Act 1979* (EP&A Act) provides the overarching structure and legal framework for planning in NSW. [The *Environmental Planning & Assessment Regulation 2000* (EP&A Regulation) sets out the procedures for carrying out the functions of the *Environmental Planning & Assessment Act 1979*].

The intention of the Strategy is to provide Council with guidance to make amendments to its Local Environmental Plan and Development Control Plan in accordance with the Act and Regulations.

#### 3.1.2 State Environmental Planning Policies

*State Environmental Planning Policies (SEPPs)* outline the State’s approach to dealing with planning issues. The SEPPs are an important resource for determining the appropriateness of development and the impacts of development on areas, matters or resources of state significance.

The following outlines a number of SEPPs which could have an impact on the outcomes of the Strategy:

- ***State Environmental Planning Policy (Sydney Drinking Water Catchment) 2011***  
The purpose of the SEPP (Sydney Drinking Water Catchment) 2011 is to provide for healthy water catchments and to ensure that any proposed developments within the Sydney Drinking Water Catchment area will have a neutral or beneficial effect on water quality. The majority of the LGA is located within the Sydney Drinking Water Catchment. As such, Council must consider the impact of any development on the water catchment. This Policy will be considered during the development of this Strategy.
- ***State Environmental Planning Policy (Rural Lands) 2008***  
The purpose of the SEPP (Rural Lands) 2008, is to facilitate the orderly and economic use and development of rural lands for rural and related purposes, and to implement measures to reduce land use conflict. This SEPP would be applicable if there were recommendations to rezone rural land uses for employment lands.
- ***State Environmental Planning Policy (Mining, Petroleum Production & Extractive Industries) 2007***  
The purpose of the SEPP (Mining, Petroleum Production & Extractive Industries) 2007 is to provide for the management and development of mineral, petroleum and extractive material resources and to establish appropriate planning controls to encourage ecologically sustainable development. The definition of extractive industry under this SEPP includes the removal of extractive minerals by quarrying methods and “extractive minerals” includes sand, gravel, clay, soil, rock, stone or other similar substances. Recognising the importance of quarrying within the Marulan Precinct, this Policy will have an ongoing role in planning for extractive industries development.

- **State Environmental Planning Policy No. 55 - Remediation of Land**

The purpose of the SEPP No. 55 – Remediation of Land is to provide a state-wide planning approach to the remediation of contaminated land. The Policy would be applicable to the Strategy where it makes recommendations about the use of contaminated lands. Any recommendations in the Strategy would need to consider the requirements of this Policy.

- **State Environmental Planning Policy No. 33 - Hazardous & Offensive Development**

The purpose of SEPP No.33 – Hazardous & Offensive Development is to ensure that any hazardous or offensive development proposed does not unduly impact on surrounding land uses. Given the location of industrial activities, consideration will be given to this Policy.

### **3.1.3 Goulburn Mulwaree Local Environmental Plan 2009**

The *Goulburn Mulwaree Local Environmental Plan 2009* (LEP), applies across the whole Local Government Area. The LEP designates the most appropriate uses for land across the LGA in the form of zoning, sets out the standards and consideration for development permitted within the LGA. The designation of employment lands has been based over time on the quality and suitability of land to support employment uses.

#### **3.1.3.1 Land Use Zoning**

There are ten land use zones within the *Goulburn Mulwaree Local Environmental Plan 2009* which support employment uses (refer Table 3 below). This Strategy will profile each of the different employment zones.

It is noted that there are some employment generating land uses within the LGA occurring outside of these zones (“out of zone”). Where these have been identified, they are noted. However, dispersed employment uses such as “home based business” are not addressed given the complexity in determining the location of these businesses. Nonetheless, home-based business remains an anecdotally important source of employment. The Small Business Commissioner of NSW indicates that more than one third of NSW small businesses are based in regional NSW and Census data 2011 indicates that 5% of the working population of Goulburn Mulwaree work in home based businesses.

The applicable land use zones in LEP 2009 and their objectives are outlined in Table 3 below. While also considering commercial and retail employment uses, the focus of this Strategy is industrial land uses and as such, the focus will be on the following zones - B6 Enterprise Corridor, IN1 General Industrial, IN2 Light Industrial and IN3 Heavy Industrial.

**Table 3: Land Use Zoning (Source: Goulburn Mulwaree Local Environmental Plan 2009)**

Land Use Zone & area of zoned land (Ha)	Objective
<b>Business Zones</b>	
<b>B1 Neighbourhood Centre (6.17 Ha)</b>	<ul style="list-style-type: none"> <li>To provide a range of small-scale retail, business and community uses which serve the needs of people who live or work in the surrounding neighbourhood.</li> </ul>
<b>B2 Local Centre (30.83 Ha)</b>	<ul style="list-style-type: none"> <li>To provide a range of retail, business, entertainment and community uses which serve the needs of people who live in, work in and visit the local area.</li> <li>To encourage employment opportunities in accessible locations.</li> <li>To maximise public transport patronage and encourage walking and cycling.</li> </ul>
<b>B3 Commercial Core (46.49 Ha)</b>	<ul style="list-style-type: none"> <li>To provide a wide range of retail, business, office, entertainment, community and other suitable land uses which serve the needs of the local and wider community.</li> <li>To encourage appropriate employment opportunities in accessible locations.</li> <li>To maximise public transport patronage and encourage walking and cycling.</li> <li>To reinforce the status of Goulburn as a regional centre.</li> <li>To ensure the scale and density of development complements the desired future character of the commercial core.</li> <li>To protect the historic importance of Goulburn and protect heritage integrity of its historic built form.</li> </ul>
<b>B4 Mixed Use (93.48 Ha)</b>	<ul style="list-style-type: none"> <li>To provide a mixture of compatible land uses.</li> <li>To integrate suitable business, office, residential, retail and other development in accessible locations so as to maximise public transport patronage and encourage walking and cycling.</li> <li>To maintain and reinforce the role and function of the Goulburn central business district as a major regional centre.</li> <li>To protect the amenity of the areas surrounding the commercial core from encroachment by commercial and retail development, which should be located within the commercial core, because of the demand generated by such development for parking and public infrastructure.</li> </ul>
<b>B6 Enterprise Corridor (317.1 Ha)</b>	<ul style="list-style-type: none"> <li>To promote businesses along main roads and to encourage a mix of compatible uses.</li> <li>To provide a range of employment uses (including business, office, retail and light industrial uses).</li> <li>To maintain the economic strength of centres by limiting the retailing activity.</li> </ul>
<b>Industrial Zones</b>	
<b>IN1 General Industrial (705 Ha)</b>	<ul style="list-style-type: none"> <li>To provide a wide range of industrial and warehouse land uses.</li> <li>To encourage employment opportunities.</li> <li>To minimise any adverse effect of industry on other land uses.</li> <li>To support and protect industrial land for industrial uses</li> </ul>
<b>IN2 Light Industrial (170.9 Ha)</b>	<ul style="list-style-type: none"> <li>To provide a wide range of light industrial, warehouse and related land uses.</li> <li>To encourage employment opportunities and to support the viability of centres.</li> <li>To minimise any adverse effect of industry on other land uses.</li> <li>To enable other land uses that provides facilities or services to meet the day to day needs of workers in the area.</li> <li>To support and protect industrial land for industrial uses.</li> </ul>
<b>IN3 Heavy Industrial (3214 Ha)</b>	<ul style="list-style-type: none"> <li>To provide suitable areas for those industries that need to be separated from other land uses.</li> <li>To encourage employment opportunities.</li> <li>To minimise any adverse effect of heavy industry on other land uses.</li> <li>To support and protect industrial land for industrial uses.</li> <li>To recognise and provide for the diverse demands and implications of industry, warehousing, transport and servicing activities and ancillary land uses.</li> </ul>
<b>Mixed Residential Zones</b>	
<b>RU5 Village (283.3 Ha)</b>	<ul style="list-style-type: none"> <li>To provide for a range of land uses, services and facilities that are associated with a rural village.</li> <li>To protect and enhance the quality of water received by surface water and groundwater water sources and reduce their degradation.</li> </ul>
<b>RU6 Transition (9491 Ha)</b>	<ul style="list-style-type: none"> <li>To protect and maintain land that provides a transition between rural and other land uses of varying intensities or environmental sensitivities.</li> <li>To minimise conflict between land uses within this zone and land uses within adjoining zones.</li> </ul>

The types of applicable employment land uses permitted, permitted with consent and prohibited within each land use zone are outlined in Table 4 below. Whilst residential uses are permitted within some of these zones, there are several types of residential land uses and not all of these will be permitted within zones designated for employment uses. Specific reference should be made to the LEP Land use tables to determine which types of residential uses are permitted.

**Table 4: Permitted Uses in Employment Lands Zones (Source: Goulburn Mulwaree Local Environmental Plan 2009)**

Applicable Zones	Permitted Uses			
	Residential	Retail	Commercial	Industrial
B1 Neighbourhood Centre	✓	✓	✓	⊘
B2 Local Centre	✓	✓	✓	⊘
B3 Commercial Core	✓	✓	✓	⊘
B4 Mixed Use	✓	✓	✓	✓
B6 Enterprise Corridor	⊘	✓	✓	✓
IN1 General Industrial	⊘	✓	⊘	✓
IN2 Light Industrial	✓	✓	⊘	✓
IN3 Heavy Industrial	⊘	⊘	⊘	✓
RU5 Village	✓	✓	✓	✓
RU6 Transition	✓	✓	✓	⊘

### 3.1.3.2 Principal Development Standards

The *Principal Development Standards* within the Goulburn Mulwaree LEP provide further guidance for determining the form and nature of development permitted within the LGA. The standards cover minimum subdivision sizes, building heights and floor space ratios for land and development of land across the LGA. The standards vary according to the location of land and it is noted that there are specific standards for each precinct and area within the scope of the Strategy. The standards which apply to employment lands across the LGA have been identified in Table 5.

The Standards are considered important if they present a specific issue or barrier to development in certain precincts. As such, they should be considered in light of whether, if amended, they could encourage more appropriate employment land uses.

**Table 5: Principal Development Standards and Objectives**

Principal Development Standard	Objective	Provision
4.1 Minimum Subdivision Lot Size	<ul style="list-style-type: none"> <li>To provide a minimum lot size for the subdivision of land.</li> </ul>	Ducks Lane/Lockyer Street/Sowerby Street Precincts - No minimum Hume Street Precinct - No minimum Mary Street Precinct - No minimum Common Street Precinct - No minimum North Common Street Precinct - No minimum Sydney Road Precinct - No minimum Hetherington Street Precinct - No minimum Tait Crescent Precinct - No minimum Sale Yards Precinct - No minimum Rail Yards Precinct - No minimum Murrays Flat Precinct - No minimum Bradfordville Industrial Estate Precinct - No minimum

Principal Development Standard	Objective	Provision
		Taralga Road Precinct - No minimum Maud Street Precinct - 1,500m <sup>2</sup> Portland Ave/Wilson Drive Precinct - 700m <sup>2</sup> West Marulan Precinct - 100ha Suffolk Street Precinct - 2,000m <sup>2</sup> Marulan Precinct - 100ha South Marulan Precinct - 100ha Tarago Precinct - 100ha
<b>4.3 Height of Buildings</b>	<ul style="list-style-type: none"> <li>To ensure the height of buildings complements the streetscape or the rural character of the area in which the buildings are located.</li> <li>To protect the heritage character and significance of buildings and avoid an adverse effect on the integrity of heritage items.</li> <li>To ensure the height of buildings protects the amenity of neighbouring properties in terms of visual bulk, access to sunlight, privacy and views.</li> <li>The height of a building on any land is not to exceed the maximum height shown for the land on the height of buildings map.</li> </ul>	Goulburn CBD -, B3 Commercial Core is 15m and B4 Mixed Use is 10m Tarago - 8m Marulan - 10m
<b>4.4 Floor Space ratio</b>	<ul style="list-style-type: none"> <li>To ensure the bulk and scale of development does not have an unacceptable impact on the streetscape and character of the area in which the development is located.</li> <li>The maximum floor space ratio for a building on any land is not to exceed the floor space ratio shown for the land on the floor space ratio map.</li> </ul>	Goulburn CBD - 0.8:1, 1.2:1, 1.5:1, 2:1 Marulan - 0.8:1, 1.2:1

### 3.1.3.3 Miscellaneous and Additional Local Provisions

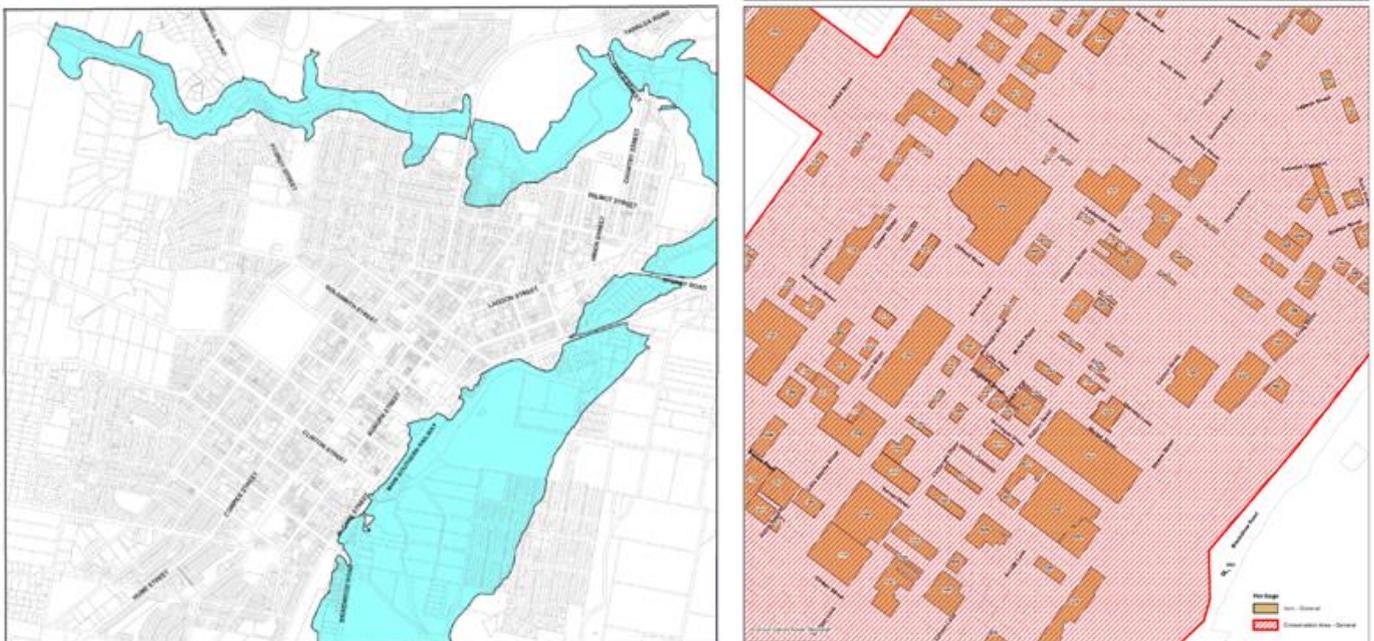
There are a number of provisions including *Miscellaneous Provisions* and *Additional Local Provisions* within the Goulburn Mulwaree LEP which could influence the supply of employment lands within the LGA. The provisions which substantively influence the nature of uses and potential for development are heritage and flooding. Additionally, Clause 5.3 and Clause 5.4 of Goulburn Mulwaree LEP 2009 provide specific provisions for development which could impact on identifying additional employment lands. These provisions are identified in Table 6 and the LEP maps for the heritage and flooding provisions have been provided Figure 21.

**Table 6: Miscellaneous Provisions and Additional Local Provisions**

Principal Development Standard	Objective	Applicability to Strategy
<i>Miscellaneous Provisions</i>		
<b>5.3 Development near zone boundaries</b>	<ul style="list-style-type: none"> <li>The objective of this clause is to provide flexibility where the investigation of a site and its surroundings reveals that a use allowed on the other side of a zone boundary would enable a more logical and appropriate development of the site and be compatible with the planning objectives and land uses for the adjoining zone.</li> </ul>	Could influence determining the location of employment lands in particular additional industrial lands which may have an impact on sensitive land uses on adjoining lots.
<b>5.4 Controls relating to miscellaneous permissible uses</b>	Provides additional controls for specific permissible land uses including: <ul style="list-style-type: none"> <li>Bed and breakfast accommodation</li> </ul>	Could influence determining the location of additional employment lands and the requirement to allocate additional lands if

	<ul style="list-style-type: none"> <li>• Home businesses</li> <li>• Home industries</li> <li>• Industrial retail outlets</li> <li>• Farm stay accommodation</li> <li>• Kiosks</li> <li>• Neighbourhood shops</li> <li>• Roadside stalls</li> <li>• Secondary dwellings</li> </ul>	employment uses are already permissible within an existing zone.
<b>5.10 Heritage Conservation</b>	<ul style="list-style-type: none"> <li>• To conserve the environmental heritage of Goulburn Mulwaree,</li> <li>• To conserve the heritage significance of heritage items and heritage conservation areas, including associated fabric, settings and views,</li> <li>• To conserve archaeological sites,</li> <li>• To conserve Aboriginal objects and Aboriginal places of heritage significance.</li> </ul>	Consider how to manage significant heritage values including introducing policies which make it easier to redevelop and repurpose existing heritage areas.
<b>Flooding Provisions</b>		
<b>7.1 Flood Planning</b>	<ul style="list-style-type: none"> <li>• To maintain the existing flood regime and flow conveyance capacity.</li> <li>• To enable safe occupation and evacuation of land subject to flooding.</li> <li>• To avoid significant adverse impacts on flood behaviour.</li> <li>• To avoid significant effects on the environment that would cause avoidable erosion, siltation, destruction of riparian vegetation or a reduction in the stability of river banks or watercourses.</li> <li>• To limit uses to those compatible with flow conveyance function and flood hazard.</li> </ul>	Flood hazard will influence the location of additional employment lands.

Figure 21 Goulburn Mulwaree LEP 2009 Flood Overlay Map & Heritage Overlay Map



Source: PSA Consulting Australia & Goulburn Mulwaree LGA LEP FLD\_001D & HER\_001DE

### 3.1.4 Goulburn Mulwaree Development Control Plan 2009

Development Control Plans (DCPs) are written by Council to (The *Goulburn Mulwaree Development Control Plan 2009* includes provisions relevant to the development of employment lands) provide detailed guidelines, controls and general information relating to the decision making process. As part of this summary of the DCP, specific areas of interest to the Employment Lands Strategy will be identified. However it is acknowledged that a number of specific locality objectives will have already been achieved.

#### 3.1.4.1 General Development Objectives

Goulburn Mulwaree DCP 2009 sets out a number of general development objectives which are applicable to employment lands. These objectives will be important to consider when determining the most appropriate location of employment lands within the LGA. Applicable objectives include:

- *Employment uses should be sensitively designed and located to minimise conflict;*
- *Non-residential land uses shall not impact upon the amenity of the area or surrounding sensitive land uses. This would include, for example, local shops and commercial premises, schools, child care centres, places of worship, open space and recreation; and*
- *Commercial land uses shall be clustered to minimise car trips and promote focus on pedestrian and cycle ways.*

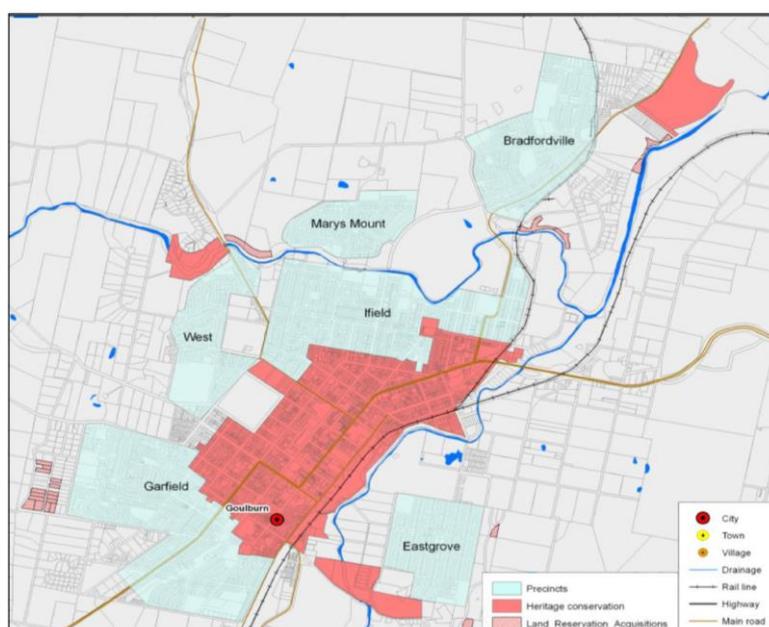
#### 3.1.4.2 Locality Objectives

The DCP includes provisions (locality objectives and desired future character statements) to inform how the design and characteristics of future development can be consistent with the existing character. Within the DCP there are locality objectives identified for Goulburn, Marulan, Bungonia, Lake Bathurst, Tallong and Tarago. Given there are limited employment lands in the villages, the only objectives which are applicable to this Strategy include those identified for Goulburn, Marulan and Tarago.

#### Goulburn

The DCP identifies six distinctive locality character areas within Goulburn, which are identified in Figure 22 and includes Bradfordville, Eastgrove, Garfield, West, Ifield and Mary's Mount. Objectives for each of these areas focus primarily on ensuring these areas are used for residential accommodation. Objectives for central Goulburn focus on maintaining the heritage character of the area.

Figure 22 Goulburn Mulwaree DCP 2009 - Goulburn Locality Area



Source: PSA Consulting Australia & Goulburn Mulwaree DCP 2009

### **Marulan**

- Ensuring Marulan remains an important employment base for the LGA;
- Reinforce the existing character of the main street of Marulan (George Street) and the importance of the commercial precinct;
- Some extension of the existing town to the north is proposed to facilitate continued growth and diversity of housing types; and
- Consolidate existing and future heavy industrial uses west and south of Marulan.

### **Tarago**

- Reinforcing the town's character as a rural town servicing surrounding rural areas and villages;
- Enabling a variety of land uses including commercial employment, recreational and mixed uses; and
- Augmenting the transition of existing industrial uses to large lot residential uses.

The last locality objective for Tarago in terms of this Employment Lands Strategy is noted and will be revisited.

#### **3.1.4.3 Other provisions**

Goulburn Mulwaree DCP 2009 also contains specific provisions for:

- Mixed use development – industrial and residential
- Development within the B6 Enterprise Corridor zone
- Extractive industries

#### **3.1.4.4 Site Specific Provisions**

Further retail, commercial and industrial lands have also been identified within the DCP and provided with site specific provisions. Sites of note include Mary's Mount; Common Street Precinct; Marulan Local Business Centre and the Goulburn Central Business District. Specific details are provided below.

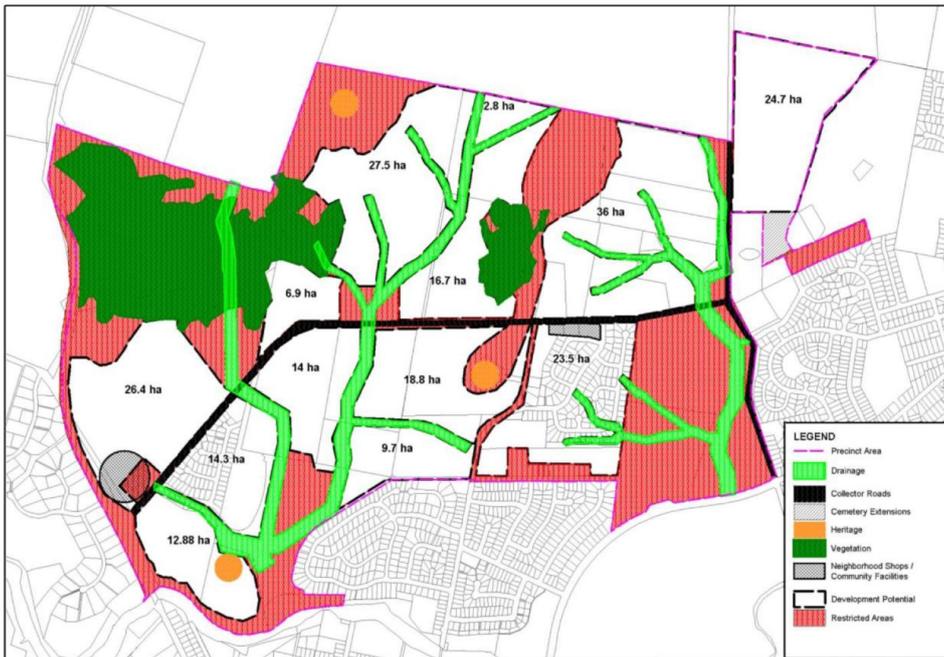
##### **Mary's Mount, Goulburn**

The Mary's Mount area is zoned R2 Low Density Residential and identified within the DCP as the primary area for new residential land release in the LGA. The 234 hectare area is located to the north of the Goulburn CBD and the Wollondilly River and has a development potential for 2,000 residential lots. Figure 23 below indicates the development potential of the site from the Goulburn Mulwaree DCP 2009. This area is currently under development.

The Mary's Mount area accommodates a small B1 Neighbourhood Centre zone which would allow for a range of retail uses permissible within this zone such as medical centres and neighbourhood shops. The site on the corner of Mary Mount's Road and Crookwell Road is identified within potential neighbourhood shop development and a recent development application was approved in October 2015 for Shops, Business, Medical Centre, Car parking & 9 Lot Subdivision. The total floor area of the neighbourhood shops is not to exceed 1000m<sup>2</sup> of which a small supermarket would not exceed 800m<sup>2</sup>. These standards are set out in LEP 2009 clause.

The neighbourhood shop development area proposed for Mary's Mount is important to take into consideration within the Strategy, in order to determine the total areas available for employment lands. However development of this area is unlikely to have a significant impact on the overall provision of retail within Goulburn and as such, has limited impact on the overall Strategy.

Figure 23 Mary's Mount Development Potential – DCP 2009



Source: PSA Consulting Australia & Goulburn Mulwaree Development Control Plan 2009

### Common Street, Goulburn

Common Street is a large area of approximately 192ha and has been identified within the DCP as an area for mixed use development. The site is located along the eastern periphery of Goulburn, east of both the Mulwaree River and the railway line. It encompasses several precincts identified as part of the Strategy including the Common Street Precinct; the North Common Street Precinct; the Sydney Road Precinct and the Hetherington Street Precinct. The developable land equates to approximately 120 hectares with no minimum lot size specified. Figure 24 below indicates the development potential of the site identified by the DCP and provides for business, residential and light industrial land uses. The Precincts making up the Common Street area will be considered as part of the Strategy in order to determine the total employment lands available across the LGA.

Figure 24: Common Street Area Identified Within DCP



Source: PSA Consulting Australia & Goulburn Mulwaree Development Control Plan 2009

## Marulan

Within the DCP 2009, the main street of Marulan (George Street) is zoned B2 Local Centre and identified for mixed use development. Figure 25 illustrates this area of Marulan. As part of the Strategy, this area is identified as the Marulan Retail Precinct. This area is considered within the Strategy because of its significant potential for locating employment lands given its proximity to the Hume Highway, proximity to Goulburn and the local extractive industries.

**Figure 25: DCP Identification of Mixed Use Lands within Marulan**

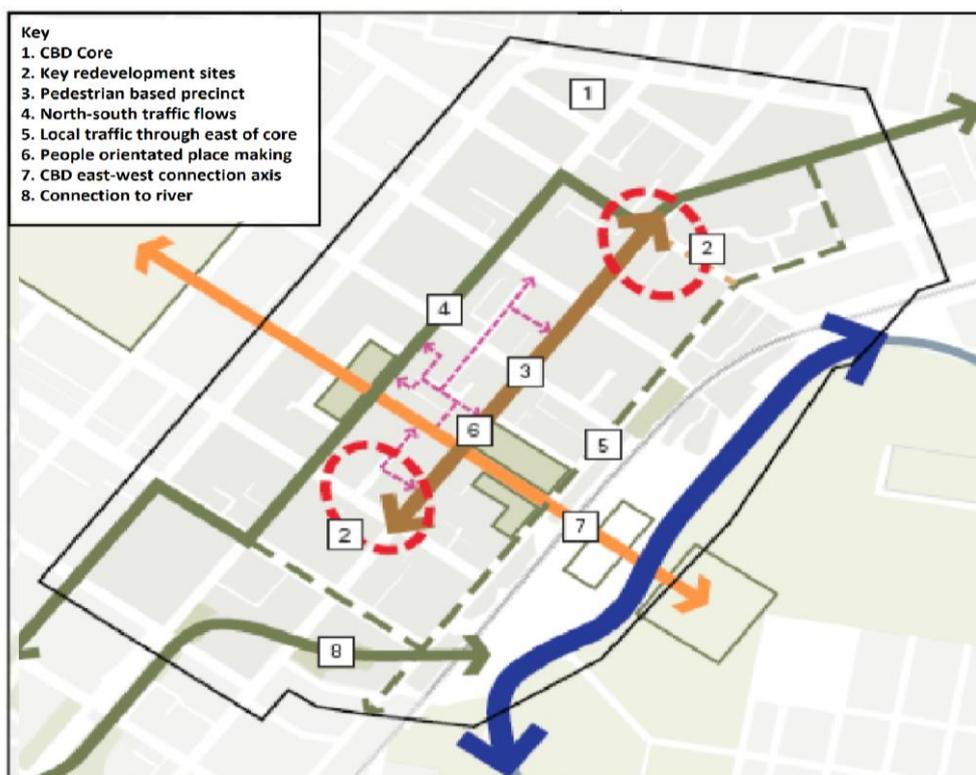


Source: PSA Consulting Australia & Goulburn Mulwaree LEP – Land Zoning Map LZP\_003C

## Goulburn CBD

The DCP identifies the CBD as an area which significantly contributes to the economic viability of the centre and seeks to consolidate the land uses within the centre to support and enhance this function. The DCP also identifies key redevelopment sites at both the northern and southern ends of the CBD as indicated in Figure 26. The concept development plan identifies a mix of land uses within the CBD including boutique and large format retail, civic, cultural, residential and commercial land uses.

Figure 26: DCP Concept Development Plan for the Goulburn CBD



Source: PSA Consulting Australia & Goulburn Mulwaree Development Control Plan 2009

The DCP identifies eight strategies to implement in the CBD. The DCP strategies most relevant to the Employment Lands Strategy include #1 and #2. These strategies place an emphasis on consolidating the CBD core to support and enhance its function as an economic driver. The Employment Lands Strategy supports the strategies within the DCP by placing an emphasis on strengthening and consolidating appropriate employment uses in the CBD.

### 3.1.5 Summary of Statutory Documentation

Understanding the statutory frameworks which guide development within the local context is important for the development of the Strategy.

Both the *EP&A Act* and the *EP&A Regulation* are important legislative documents which outline the process for amending the LEP and DCP to accommodate additional employment lands if required. The SEPPs will be considered during the development of this Strategy to ensure that any recommended industries or land uses comply with all policy practices and standards, to avoid encouraging proposals which are inappropriate.

The LEP locates existing employment lands through zoning and also provides statutory guidance around the most appropriate land uses within each zone. It is noted that employment generating land uses occur outside of these zones and can be significant. Zoning could be subject to review if the Strategy identifies a need for additional employment lands. The LEP also provides more specific provisions that may be relevant to the development of employment lands e.g.

heritage conservation. These provisions should be considered in light of whether, if amended, they could encourage more appropriate employment land uses.

The DCP provides more strategic guidance on specific areas within Goulburn Mulwaree which have previously been identified for employment lands including Mary's Mount, Marulan, Common Street and the Goulburn CBD. What is notable is that some of the recommended strategies from the DCP for each area have already been implemented.

The statutory documentation for Goulburn Mulwaree identifies a number of issues within Goulburn Mulwaree which are important for the development of the Strategy including:

- Protection of historic values and buildings within the CBD;
- Issues regarding quarrying in Marulan;
- Diversity of precincts across Goulburn;
- Proximity of industrial uses to residential areas; and
- Transition of industrial land to large lot residential in Tarago.

## 3.2 REGIONAL AND STRATEGIC PLANNING

State and local government plans, policies and strategies direct planning and development and provide a framework for investment decisions. This section provides an overview of the relevant documentation including the specific strategies applicable to employment lands for Goulburn Mulwaree.

This section identifies the relevant strategic documentation from the regional and local level as it relates to employment uses.

### 3.2.1 Draft South East and Tablelands Regional Plan

The Department of Planning and Environment release a draft Regional Plan in May 2016. The Plan is a 20 year blueprint for the future, containing goals and actions that aim to build a strong diversified economy and resilient and sustainable communities. The draft Plan sets out four main goals:

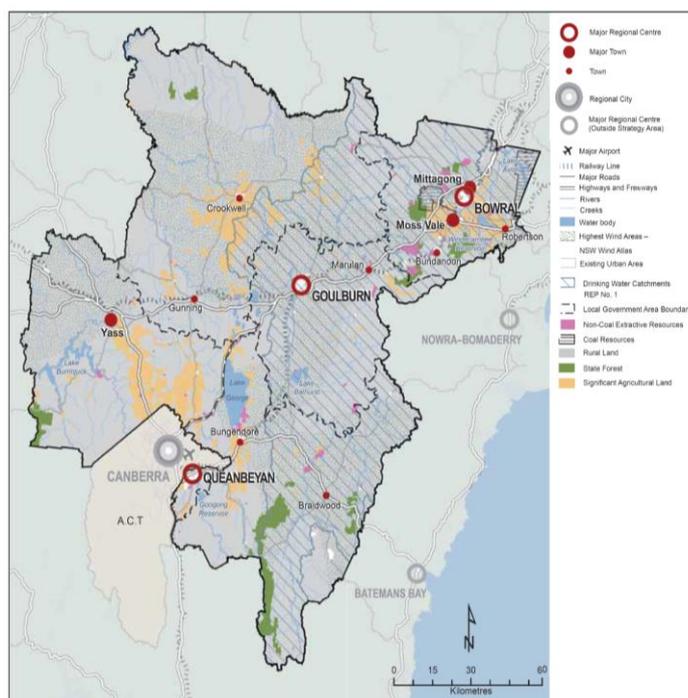
- Sustainably manage growth opportunities arising from the ACT
- Protect and enhance the region’s natural environment
- Strengthen the economic opportunities of the region
- Build communities that are strong, healthy and well-connected

The actions of relevance to the Employment Land Strategy cover a range of issues from tourism potential, the expansion of Canberra Airport and strengthening the economic opportunities for the Region and where appropriate have been referenced in the Strategy.

### 3.2.2 Sydney - Canberra Corridor Regional Strategy 2006–2031

The Sydney - Canberra Corridor Regional Strategy 2006–2031 (Corridor Strategy) identifies the Corridor as a key State and National corridor for transport, communication flows, goods and services. The extent of the Corridor is as far north as Bowral and as far South as Queanbeyan as illustrated in Figure 27. It recognises that the Corridor represents a significant economic advantage for the region. In addition to the links to Sydney and Canberra, the Strategy identifies the links the Corridor has to Wollongong, the Illawarra and the South Coast, and the south western slopes of NSW.

Figure 27: Sydney - Canberra Corridor Map



Source: PSA Consulting Australia & Sydney-Canberra Corridor Strategy

The population within the Corridor was 137,000 at the time of the Strategy being released (2008), with the expected increase in population of the region to be 46,350, bringing the total to 183,530 people by 2031. An additional 27,800 jobs will be required to accommodate this increase in population.

Two economic strengths of the region are identified as:

- Accessibility to major transport infrastructure; and
- Supply of affordable employment lands relative to Canberra and Sydney.

Goulburn is identified as being a traditional service centre which has experienced moderate growth and population ageing comparable to other regional centres. Rural lifestyle housing is recognised as being a significant attractor to the region, and the location of Goulburn within the Corridor makes this land use increasing popular within the LGA.

The aims of the Strategy applicable to this Employment Lands Strategy include:

- Ensuring an adequate supply of land to support economic growth and provide capacity to accommodate a projected 27,800 new jobs within the Corridor, particularly in the areas of manufacturing, transport and logistics, business services, health, aged care and tourism.

The actions within the Corridor Strategy applicable to the Employment Lands Strategy include:

- Local strategies and environmental plans will ensure that major regional centres are the focus for the majority of new employment lands releases in the LGA;
- Local strategies and local environmental plans will identify and safeguard appropriate and adequate land for employment purposes consistent with meeting the type of demand identified in the strategy. This is to include consideration of measures such as minimising fragmentation; appropriate land use zoning and sequencing/staging provisions;
- Local environmental plans are to incorporate appropriate provisions to facilitate growth in the nominated major regional centres, towns and villages, including as home-based employment;
- Council-based mechanisms will be identified to preserve and support the identified hierarchy of commercial centres for the region;
- The Department of Planning, in consultation with councils, will establish a framework to monitor the supply of employment lands, including details on location and zoning, with monitoring to be updated annually by councils;
- Any future proposals for significant employment lands outside of the major regional centres are to satisfy the Sustainability criteria;

The Corridor Strategy identified a total of 615ha of employment lands within Goulburn, with 150ha vacant. It also identified that an additional 50ha will be required within the central subregion of the corridor to accommodate an additional 1,800 jobs for the region.

This Strategy will respond to the actions identified in the Corridor Strategy through providing recommendations on the LEP regarding mechanisms and provision to facilitate growth, recommendations to safeguard appropriate and adequate land, and to undertake a survey of land.

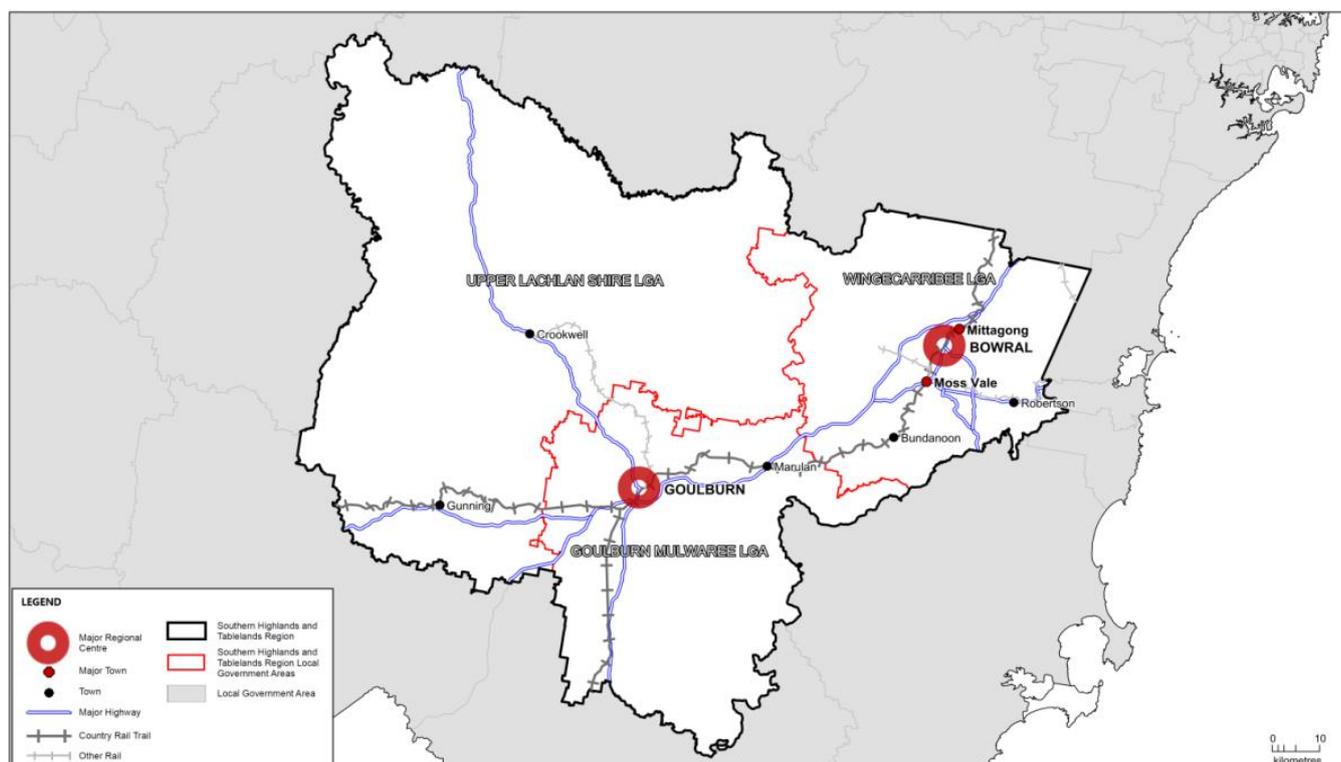
The Corridor Strategy also identifies the following challenges:

- Access to reliable and affordable reticulated water;
- Demand for new, affordable and appropriate housing;
- Demand for short term accommodation for key employers and tourists; and
- Provision, capacity and cost of infrastructure provision and service delivery.

NB: A new regional strategy is being prepared and will replace the current regional strategy.

### 3.2.3 Southern Highlands & Tablelands Regional Action Plan NSW 2021 (2012)

The *Southern Highlands & Tablelands Regional Action Plan NSW 2021* (the Plan), sets out a vision for the region and identifies the actions the NSW Government will take over the next few years to address the priorities raised by



communities within the Southern Highlands and Tablelands Region. The Southern Highlands and Tablelands Region is identified by the State Government and includes the Wingecarribee, Goulburn Mulwaree and Upper Lachlan LGAs.

**Figure 28: Southern Highlands & Tablelands Region**

Source: PSA Consulting Australia & Southern Inland Regional Plan

The regional priorities, actions and initiatives identified by the Plan which are applicable to the Employment Lands Strategy are listed below and include industry-wide strategies and specific initiatives for Goulburn Mulwaree. Of note is that actions under Regional Priorities 1 and 4 for upgrading local infrastructure and investment in health facilities have been completed, while Regional Priorities 2 and 3 have effectively been implemented.

#### **Regional Priority #1 – Revitalise the Economy**

Priority Actions:

- *Support business and industry to grow* – support key growth sectors including agribusiness, tourism, renewable energy and small business. Industry Action Plans are developed to support tourism, manufacturing, professional services, digital economy and international education and research sectors.
- *Diversify the economy by attracting and supporting key growth sectors* - key initiatives include:
  - Develop the **Goulburn Freight/Logistics Hub** in partnership with Goulburn Mulwaree Council;
  - Investigate a **Security and Emergency Services Precinct in Goulburn**. Develop a hub of security and emergency based activities to collectively develop opportunities and partnerships associated with the existing NSW Police Academy and Goulburn Correction Centre;

- *Upgrade Local Infrastructure* – assist councils to upgrade local infrastructure via the *Local Infrastructure Renewal Scheme*. Key initiatives include:
  - **Delivering upgrades to the Goulburn sewer** in partnership with Council. This project currently underway includes replacing the wastewater treatment plant which will make recycled water available for use by industry and the community;
  - **Constructing a multi-use complex in partnership with Council**. This completed complex includes a sports centre, exhibition and performance space and upgrade of existing facilities.

### **Regional Priority #2 – Effectively Manage Natural Resources and Agricultural Land**

Priority actions:

- *Improve strategic planning to safeguard the natural environment and heritage* – key initiatives include:
  - Review and update the Sydney-Canberra Corridor Regional Strategy.

### **Regional Priority #3 – Provide accessible efficient and integrated regional transport**

Priority Actions:

- *Long term transport master plan and regional transport planning* – identify strategic directions for integrated passenger transport systems in NSW.
- *Improve the movement of freight in the region* – develop the NSW Freight and Ports Strategy to identify mechanisms to deliver better coordination along the supply chain, outline long term view of infrastructure investment requirements and identify opportunities for improved performance and greater efficiency.

### **Regional Priority #4 – Deliver Quality Health and Community Services**

Priority Actions:

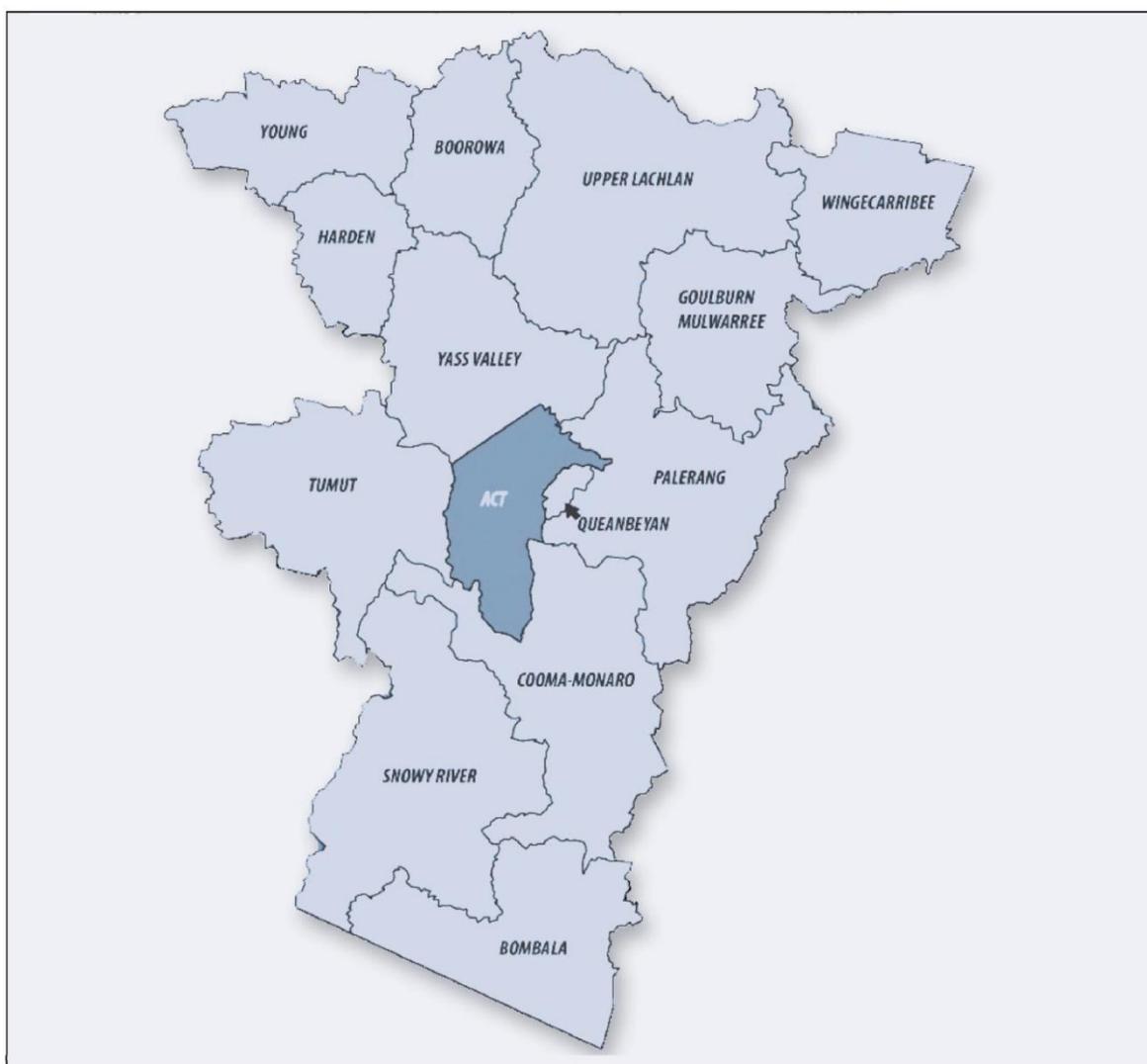
- *Invest in and maintain health infrastructure* – strengthen hospital and health networks. Key initiatives include:
  - Investing in new infrastructure at **Goulburn Base Hospital including the expansion of the Chisholm Ross Centre**, a 20 bed acute mental health facility, a new CT scanner, a new 20 bed sub-acute ward, refurbishing the Emergency Department, providing an additional three emergency spaces and an operating theatre, which has now been undertaken

### **3.2.4 Regional Development Australia - Southern Inland Regional Plan 2013–2016**

The *Southern Inland Regional Plan 2013-2016* was developed by Regional Development Australia, a Federal Government initiative to ensure collaboration of all levels of government in regional development. RDAs work to drive regional economic development and unlock the economic potential of their regions.

The Southern Inland Region is made up of 14 LGAs, including Goulburn Mulwaree as illustrated in Figure 29. The *Southern Inland Regional Plan 2013–2016* outlines the regional priorities.

Figure 29: Regional Development Australia's Southern Inland Region



Source: PSA Consulting Australia & Southern Inland Regional Plan

Analysis of the Southern Inland Regional Action Plan highlights several key challenges and opportunities for the region which directly impact on the supply and demand of employment and development of employment lands within the Goulburn Mulwaree LGA. These challenges and opportunities have been summarised and are presented in Table 78.

Table 7: Key Challenges and Opportunities Identified in Southern Inland Regional Plan

Theme	Challenges	Opportunities
Education	Low levels of tertiary educated population No universities within the Southern Inland Region – closest being located in the ACT and Sydney	<i>National Education Program</i> <i>DEEWR – Building Australia’s Future Workforce program</i> <i>DEEWR - Southern Inland Regional Education, Skills &amp; Jobs Plan</i> <i>Smart Work Hub</i>
	Lack of skilled workers	<i>Regional Skilled Migration Scheme</i> <i>State Sponsored Migration Scheme</i> <i>Commonwealth – enterprise-based funding initiatives re-skilling mature aged workers</i>
Infrastructure	Technology infrastructure	<i>NBN rollout</i> <i>Renewable energy sector – Clean Energy Futures program</i> <i>South East Region of Renewable Energy Excellence</i> <i>Smart Work Towns initiative</i>

		National Digital Economy Strategy Digital Enterprise Program
	<p>Transport infrastructure</p> <ul style="list-style-type: none"> <li>• Lack of public transport</li> <li>• Low infrastructure ranking - Hume Highway requires upgrade?</li> <li>• Long distance – high maintenance and infrastructure development costs</li> <li>• Access to markets</li> </ul>	<p>Develop freight and logistics hubs</p> <p>Transport Infrastructure upgrades</p> <p>Southern NSW Harvest Association – <i>The National Food Plan</i> leading to the development of a <i>NSW Regional Food Plan</i></p> <p>Access to Melbourne and Adelaide markets via road and rail</p>
	Water infrastructure	Pipeline construction from Southern Highlands
Economic	<p>Ageing population</p> <p>Agricultural industry decline</p>	<p>Increased demand for aged care related services</p> <p>Increase employment in aged care related industries</p> <p>Sustainable regional food economy across South East NSW-ACT</p> <p>Attraction of industry investment into renewable energy sector</p>

### 3.2.5 Southern Regional Transport Plan

The *Southern Regional Transport Plan (2014)*, developed by the NSW State Government Department for Transport, (DoT) outlines specific actions to address the unique challenges of the region. The Plan identifies the major transport routes through the region as illustrated in Figure 31.

Figure 30: Major Corridors to and from Southern NSW



Source: PSA Consulting Australia & Southern Regional Transport Plan

Regional considerations of the Southern Regional Transport Plan which relate to the Employment Lands Strategy include:

- The Hume Highway provides north-south connections into Victoria, Canberra (via Federal Highway) and Sydney;
- Population and economic activity is concentrated in the corridor between Sydney and Canberra and along the east coast;
- Access to health services, education and employment, predominantly located in the larger centres of the region, is reliant on the transport network connecting villages and centres; and
- Connections to the ACT and Canberra are important and freight connections are also important in supporting economic productivity.

Transport initiatives already underway include:

- A corridor is kept protected between Sydney and Canberra so high speed rail can be delivered when required (NSW Transport Master Plan).

### 3.2.6 Southern NSW Local Health District Healthcare Services Plan and Strategic Plan

The *Southern NSW Local Health District Healthcare Services Plan and Strategic Plan* is a strategic planning document which identifies the priorities and key directions for clinical services for the Southern NSW Local Health District over 5 years from 2013 – 2018. Population ageing and growth are the main demand drivers for health services within this region. Key challenges the region faces are its geographic position and the lack of a major non-metropolitan hospital or principal referral hospital within the boundaries. The region therefore relies on the ACT government Health Directorate for services.

### 3.2.7 Goulburn Mulwaree Strategy 2020

The *Goulburn Mulwaree Strategy 2020* was adopted by Council in 2006. It documents the pressures for growth, and identified current and future opportunities for sustainable growth across the LGA.

The Strategy identified that the Goulburn Mulwaree LGA was expected to experience modest population growth in selected areas including Goulburn and Marulan, with lower levels of growth expected in Tarago and other rural villages. Growth projections indicated a total population of **32,000 people by 2020**, which is in line with current growth trends of 1-1.5% increase annually.

The 2020 Strategy also identified a number of key drivers of change and key challenges to growth in the region. 9 provides an overview.

**Table 8: Goulburn Mulwaree Strategy 2020 - Drivers of Change and Challenges to Growth**

Key Drivers of Change	Key Challenges to Growth
<p><b>Ageing Population</b> Will require specialised facilities and services to meet an increasing demand.</p>	<p><b>Land Use Conflicts</b> Conflict between urban and rural residential lifestyles as well as the encroachment of development into established intensive and non-intensive agricultural areas.</p>
<p><b>Water Shortages</b> Will require strategic management to ensure there is adequate supply to meet current and future demand. <i>(note: with the construction of the Highlands Source Pipeline in 2014, water shortages are no longer an issue)</i></p>	<p><b>Water Management</b> The availability of adequate potable water for use by the region is paramount. The region will require investment in integrated water cycle management systems to substitute water supply sources. <i>(note: with the construction of the Highlands Source Pipeline in 2014, water shortages are no longer an issue)</i></p>
<p><b>Regional Centre</b> Major service industries and facilities will continue to locate within the regional centre, including social support systems, health care, education, commercial and retail services.</p>	<p><b>Amenity</b> Increases in population within regional centres will contribute to noise and visual pollution. As such strategic management of land uses is required.</p>
<p><b>Lifestyle Changers</b> Increases in population are projected to be attributable to</p>	<p><b>Waste</b> Marulan waste facility is nearing capacity and no new landfill</p>

Key Drivers of Change	Key Challenges to Growth
young families and retirees seeking housing affordability and relaxing lifestyles as well as businesses looking to reduce overheads.	sites are proposed within the LGA.

A number of strategies proposed in the Goulburn Mulwaree Strategy 2020 have a direct impact on the provision of appropriate employment lands, including:

- *Strategy 2: Employment areas capable of supporting an expanding population base and reinforcing Goulburn as a regional economy in light of its locational attributes within the Sydney to Canberra corridor;*
- *Strategy 4: Promotion of employment lands within Goulburn city, Marulan and Tarago;*
- *Strategy 6: Future planning associated with key sites across the local government area including the residential and employment lands will influence the rate and compositions of growth;*
- *Strategy 7: Reinforce role of Goulburn as centre for population and employment growth; and*
- *Strategy 8: Broaden the growth base for residential and employment land uses across towns and villages and promote rural living and lifestyle options.*

The Strategy specifically identified several growth areas within the LGA including **Light and General Industry zones** and **Business Parks** within Goulburn, as well as existing heavy industrial uses areas of south and west Marulan. It also identified that wholesale, trade and government administration were the fastest growing industries between 1996 and 2001 and the mining and energy sectors fell in productivity.

The Strategy identified a number of opportunities within the region which could lead to an increase in the prosperity of the region including:

- Consolidating the higher education opportunities within the region; and
- Improving and diversifying the services in the region.

It is important to note that this Strategy is now 13 years old and will be replaced by the Employment Land Strategy.

### 3.2.8 Goulburn Mulwaree Council Delivery Plan 2014-2017 & Operational Plan 2015-2016

The *Goulburn Mulwaree Council Delivery Plan 2014-2017 & Operational Plan 2015-2016* are the supporting strategies for the Goulburn Mulwaree Strategic Plan 2020. It is a statement of commitment where the community's strategic directions are translated into actions. It identifies a number of goals and key directions for delivering those goals for the LGA. The most applicable goal for the Employment Lands Strategy includes:

#### **GOAL – A Strong Economy**

**OBJECTIVE –** The promotion of a healthy and strong economy which will enhance the general wealth of the community. Council to work with a range of stakeholders to increase economic development and employment prospects and improve the capacity of local residents and businesses to effectively participate in growth.

#### **Key Direction 2.3 Education and Jobs**

- Council to investigate opportunities relating to the Collections Storage Precinct.

#### **Key Direction 2.5 Industrial Park**

- Continued application of the Goulburn Mulwaree Strategy 2020, LEP and DCP in all planning decision relating to employment, commercial and industrial development
- Prepare an employment lands strategy and implementation plan

### 3.2.9 Goulburn Mulwaree Economic Development Plan 2008

The *Goulburn Mulwaree Economic Development Plan's* aim is to facilitate a stronger economy and more prosperous local businesses and to identify priorities for action to encourage investment and employment growth. The Plan targets

sectors of the economy which were identified as having the greatest potential. Tourism and road freight were flagged as strong sectors of the economy. Like the Goulburn Mulwaree Strategy 2020, the Goulburn Mulwaree Economic Development Plan also identifies a number of challenges and opportunities within the LGA, including the following illustrated in 10. It should be noted that the challenges and opportunities identified in 2008 could have changed over time.

**Table 9: Challenges & Opportunities Identified in Goulburn Mulwaree Economic Development Plan 2008**

Theme	Challenge	Opportunity
<b>Location</b>	<ul style="list-style-type: none"> <li>• Viable agricultural land</li> </ul>	<ul style="list-style-type: none"> <li>• Affordable land</li> <li>• Vacant land</li> <li>• Mineral and rock deposits (Marulan)</li> <li>• Located between major population centres (Sydney and Canberra)</li> </ul>
<b>Infrastructure</b>	<ul style="list-style-type: none"> <li>• Water scarcity (<i>resolved 2014</i>)</li> <li>• Broadband and mobile phone coverage poor (<i>improvements underway</i>)</li> </ul>	<ul style="list-style-type: none"> <li>• Serviced by major freeways and railway</li> <li>• Airport</li> <li>• Stable and affordable natural gas supply</li> <li>• High level telecommunications supply</li> </ul>
<b>Economic</b>	<ul style="list-style-type: none"> <li>• Agriculture in decline</li> <li>• Low population growth</li> <li>• Ageing population</li> </ul>	<ul style="list-style-type: none"> <li>• Large government industry – NSW Police Academy and Corrective Services</li> <li>• Potential for industrial and tourism development</li> <li>• Potential logistics hub</li> <li>• Service centres along Hume Highway attract tourists</li> <li>• High population in rural areas</li> </ul>
<b>Education</b>	<ul style="list-style-type: none"> <li>• Low knowledge and technology workers</li> </ul>	

In 2015, Council reviewed the *Goulburn Mulwaree Economic Development Plan 2008*, indicating the majority of the actions from the plan have been completed or are currently ongoing. Three key priority areas were identified under the original Plan but only one key priority area is applicable to the Strategy, being “Growing and Supporting the Economy”. This key priority area encourages ***the marshalling of resources, capabilities and infrastructure of the area to support economic growth and broadening the economic base of Goulburn Mulwaree, by growing existing businesses and attracting new businesses and investment.***

Council also developed an updated Action Plan titled the *Economic Development Action Plan – June 2015*, which provides a number of actions which are applicable to this Strategy, including:

- Identify and analyse Goulburn Mulwaree’s emerging and high value industries.
- Analyse the needs of emerging and high value industries (quarrying, aged care etc) to identify value-adding opportunities such as local supply chain development, support industry opportunities, cluster development and the like.
- Undertake quarterly CBD audits, if vacancies increasing, consider Renew Goulburn or other revitalisation project to address.
- Council to investigate opportunities relating to the storage of large-scale public and private collections.
- Identify supply chain gaps which cannot be met locally, then target businesses in these sectors for relocation.
- Council to advocate and facilitate discussions with State Government and other relevant public and private stakeholders in Western Sydney and other key locations on the relocation of enterprises and/or the expansion of existing enterprises.

- Investigate the feasibility of developing a road and/or rail intermodal terminal.
- In consultation with villages, review and update existing Village Development Plans to reflect current priorities.
- Council to advocate for improved energy and communication infrastructure.
- Prepare an employment lands strategy and implementation plan.
- Employment lands: Ensure that sufficient employment lands are provided in Council planning instruments to cater for future growth.
- Council to lobby for the future development of High Speed Rail.
- Investigate opportunities for a Smart Work Hub in Goulburn.

### 3.2.10 Goulburn CBD Masterplan 2009

The *Goulburn CBD Masterplan 2009* informs urban design policy and guides change within the CBD. The key principles and their associated objectives which have implications for the Employment Lands Strategy include the following:

- **Principle # 1 Economic Viability & # 2 Social Values** – *planning initiatives and controls should seek outcomes that contribute to the economic viability of the CBD and Goulburn/Mulwaree.*
  - Plan to accommodate the projected 25 year demand for retail, commercial and residential development within the CBD.
  - Set a planning framework to facilitate complementary and integrated retail, commercial and residential uses across the CBD so as to avoid fragmentation and loss of market share.
- **Principle #3 Heritage and Urban Design Principles for the CBD** – *the aim of these principles is to enhance and revitalise the CBD.*
  - Keep the distinctive, predominantly uniform single to two storey cohesiveness of the streetscape.
  - Avoid amalgamation of the small allotments in the CBD. Amalgamation should be allowed only where the new or replacement development is in the form of those existing single or semi-detached dwellings on separate allotments or commercial buildings in the forms of bays reflecting single shop appearance.

The Masterplan identifies key sites for development and an approximate calculation of existing Gross Floor Area (GFA) for commercial premises within the CBD of 12,000m<sup>2</sup>. It is unclear how this was calculated as the table only indicates the source as a “GFA Economic Study”. Despite this, the calculation provides a base upon which to calculate current (2015) commercial floor space area.

In 2015, Council established a **CBD Future Car Parking Working Group** which was tasked to “present a report on the need, location and size of additional car park requirements in and around the CBD of Goulburn to cope with growth over the next twenty years”.

Research undertaken identifies that the number of carparking spaces more than meet the needs of the current population, however there are issues around perception of shortage and the quality and availability of access to “off main street” parking.

On reviewing the 2009 Masterplan, it became clear that a focus was needed around activating the CBD as a vibrant and inviting place to work, play and live – creating a sense of arrival in the CBD and sharpening its identity - and linking key precincts. Strategies to achieve this include:

- Improve access and connectivity for pedestrians and different types of vehicles;
- Improvements to streetscape and urban design; and
- Actively taking a more strategic approach to the establishment and development of CBD business.

The CBD Masterplan will be revised to incorporate these priorities.

### 3.2.11 Council's Land Portfolio and Investment & Marketing

The supply of vacant industrial and enterprise corridor land in the Goulburn Mulwaree Local Government Area is now largely driven by the private sector. In past years, Council has subdivided, developed and sold many industrial and enterprise corridor land holdings (some with Special Conditions included in Contracts of Sale) via an open, transparent and competitive process in an effort to drive expansion of existing industries and also develop new business opportunities. Council has been very successful as the entrepreneur in this area in the past however its remaining land portfolio is now somewhat limited.

The following is a summary of Council's remaining land portfolio, excluding commercial office buildings, preschools, community centres, museums, pumping stations, water filtration plants, sewerage treatment plants, drainage reserves, open space reserves, sporting fields, parks, roads, road reserves, impounding yards etc:

1. Vacant industrial land at 24 Ross Street, Goulburn (6.810 hectares)
2. Vacant industrial land at 43 Finlay Road, Goulburn (777.7m<sup>2</sup>)
3. Vacant enterprise corridor land at 163-167 Hume Street, Goulburn (4,500m<sup>2</sup>)
4. Vacant SP2 Infrastructure land at River Street Pipe Yard, Goulburn to be disposed of as part of depot consolidation project (5,386m<sup>2</sup>)
5. Works Depot at 2 Bourke Street, Goulburn to be disposed of as part of depot consolidation project (various buildings on 9,049m<sup>2</sup>)
6. Waste Water Effluent Treatment Farm, Taralga Road, Goulburn (170 hectares)
7. Vacant mixed zoned land off Sloane Street, Goulburn surrounding Council's nursery in Dossie Street, Goulburn
8. Vacant residential land at 49-57 Hovell Street, Goulburn (1.464 hectares)
9. Vacant residential land at 10 Benbullen Place, Goulburn (2,090m<sup>2</sup>)
10. Vacant residential land at 22 George Street, Goulburn (536m<sup>2</sup>)
11. Vacant residential land at 47 George Street, Marulan behind the Brewer Centre (6.026 hectares)
12. Public car park at 11 to 24 Ellesmere Street, Goulburn (4,047m<sup>2</sup>)
13. Public car park at 14-16 Arcade Lane, Goulburn (2,358m<sup>2</sup>)
14. Various other car parks throughout Goulburn's CBD

In 2013, Council actively began marketing the region to raise awareness of its desirability as a place to visit, live, work and invest. The Goulburn Australia Marketing Campaign has primarily been focussed at audiences in Western Sydney and Canberra. It has utilised a number of strategies including media advertising, billboards, social media and event specific campaigns and attendance at shows such as Sydney Royal and various agricultural Field Days.

One of the key components of Council's business marketing collateral is the recently released Investment Prospectus. The Prospectus outlines the region's advantages, infrastructure and profiles key economic sectors.

### 3.2.12 Key Outcomes and Implications for the Strategy

There are a significant number of strategic documents outlining a vision for the wider region and Goulburn Mulwaree, specifically including:

- Draft South East and Tablelands Regional Plan;
- Sydney - Canberra Corridor Regional Strategy 2006–2031;
- Southern Highlands & Tablelands Regional Action Plan NSW 2021 (2012);
- Regional Development Australia - Southern Inland Regional Plan 2013–2016;
- Southern Regional Transport Plan;
- Southern NSW Local Health District Healthcare Services Plan and Strategic Plan;
- Goulburn Mulwaree Strategy 2020;
- Goulburn Mulwaree Council Delivery Plan 2014-2017 & Operational Plan 2015-2016;
- Goulburn Mulwaree Economic Development Plan 2008 and Economic Development Action Plan 2016; and
- Goulburn CBD Masterplan 2009.

When analysed together, the documents provide a comprehensive overview of the trends, challenges and opportunities in regards to employment lands within Goulburn Mulwaree, the existing literature is somewhat dated and may not necessarily a true reflection of the current trends within the LGA. However these strategic documents may provide guidance including objectives and strategies which will aid in the development of employment lands into the future. A brief summary of the outcomes is as follows:

#### Trends

- Ageing population: an increase of over 65s from 13.5% in 2006 to 27.8% in 2031;
- Low population growth;
- Unemployment: a rate of 6.1% (double that of the southern end of the Corridor); youth unemployment (15-26) is more than double the total unemployment rate for the whole Region;
- Growth of quarrying around Marulan; and
- Demand for short term accommodation for key industry personnel and visitors.

#### Challenges

- Difficulties accessing certain infrastructure and commodities including water, telecommunication and health service providers (noting that water supply has been addressed);
- Historical economic base of agriculture in decline;
- Population growth is low combined with an ageing population means demand for employment lands is low; and
- Low levels of tertiary educated population.

#### Opportunities

- The Sydney to Canberra Corridor is a key State and National corridor for transport (road and rail), communication flows, goods and services;
- Existing industries within the LGA which present a significant contribution to employment include the Government sector such as the Police Academy and Corrective Services;
- Certain infrastructure makes the LGA attractive and accessible including the airport, the highways, the electricity and gas supply; and
- Affordable vacant land for residential purposes.

#### Employment Land Supply

- The identification of a total of 615ha of employment lands within Goulburn, with 150ha vacant as identified in the Sydney-Canberra Regional Strategy 2006 - 2031;

- The identification of an existing GFA calculation of commercial premises within the Goulburn CBD at 16,000sqm; and
- The identification of key redevelopment sites and sites of strategic importance for locating employment lands, including Marulan.

### **3.3 RETAIL, EMPLOYMENT AND FURTHER STUDIES**

A number of further studies including studies of retail and employment trends have been analysed to identify any trends, challenges or opportunities for the supply and demand of employment lands within Goulburn Mulwaree.

#### **3.3.1 Escape Spending Study Report**

The *Escape Spending Study* was completed by the University of Sydney in May 2015 to investigate ‘escape spending’ in the LGA. It involved a survey of residents to determine what goods and services they were buying inside and outside of Goulburn, as well as their reasons for doing so. Key reasons cited for shopping in centres other than Goulburn, include:

- Variety and range is limited within Goulburn, lack of speciality goods and services, lacking fashion stores;
- Proximity to cities and towns – short travel distances to access greater range. Day trippers and residents working in Canberra, shopped in Canberra.

#### **3.3.2 Prosperous Futures: Understanding the Potential of Australia’s Regional Cities**

The Regional Australia Institute developed a series of case studies of successful regional cities to help understand how competitive advantage and growth can become more closely aligned. Their report *Prosperous Futures: Understanding the Potential of Australia’s Regional Cities* completed in September 2014, evaluates the economies of both Goulburn and Orange. The report highlighted a number of interesting issues and trends within Goulburn including:

- Goulburn has a large hospital and aged care facilities which are seen as major attractors for retiree populations. Further, the proximity of Canberra enables relatively easy access to specialist health facilities.

It also identified several barriers to economic prosperity for Goulburn, including:

- Land ownership issues in the main street;
- Public transport to Canberra.

It makes a number of recommendations for future investment within Goulburn based on the identified trends and issues:

- Transport logistics and archival storage;
- Extractive industries; and
- Build on Goulburn’s location between Sydney, Canberra and the coast.

#### **3.3.3 Mineral Resource Audit Goulburn Mulwaree LGA**

The NSW Department of Trade and Investment completed an audit in 2012 of mineral resources across NSW. The Audit determined that within the LGA, Marulan is an important source of construction materials including hard rock aggregate and limestone. Hard rock aggregate quarries are located in the Marulan region at Gunlake, Johnniefields, Peppertree and Lynwood and a 100+ year old limestone quarry located in South Marulan. Sand and hard rock aggregate is quarried at Ardmore Park Quarry in Bungonia. Other commodities being extracted include brick clay, sand and gravel; metalliferous commodities occurring within the LGA include gold, silver, copper, lead and zinc in the Tarago region, primarily at Woodlawn Mine.

#### **3.3.4 Business Retention & Expansion Project Report**

The *Business Retention & Expansion Project* documents extensive consultation with local businesses completed in Goulburn in 2011. Focus areas and actions which could be applicable to the Employment Lands Strategy include:

### Key Focus Area 1 – Attract New Businesses

Actions:

- Develop opportunities list which reflects current industry gaps and emerging sectors. In conjunction with local stakeholders, develop a strategy to attract these businesses and promote widely, including to local entrepreneurs; facilitate and celebrate the resulting new business development.

### Key Focus Area 2 – Support and Strengthen Existing Businesses

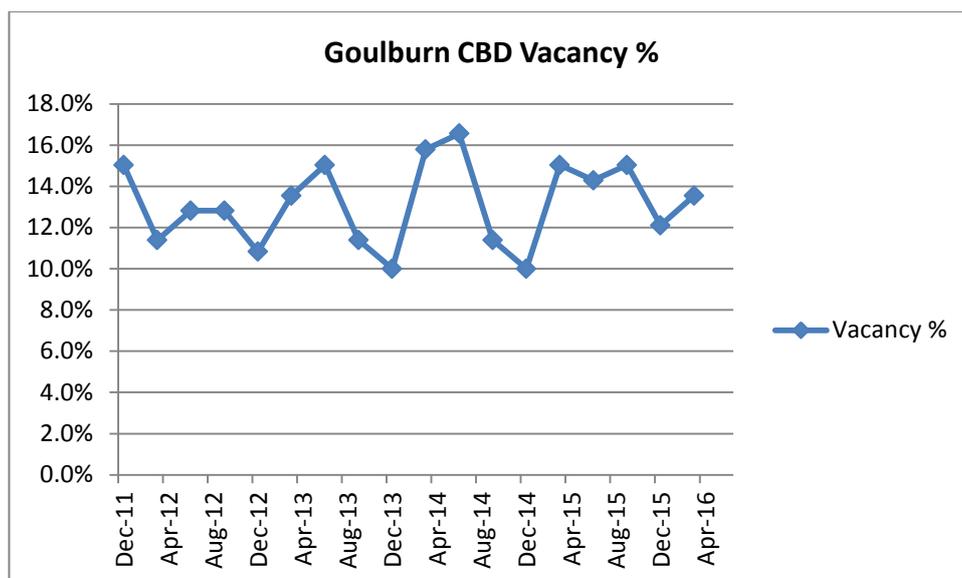
Actions:

- Conduct an emerging industries needs analysis, to identify value adding opportunities such as projected employment needs, support industry opportunities and the like;
- Develop a database listing of Goulburn Mulwaree businesses and categorise to circulate information as appropriate;
- Conduct an annual review of the state of IT infrastructure in the region to ensure service delivery standard requirements of the business community are met; and
- Promote apprenticeships and traineeships to help address skills shortages and youth out-migration.

**Note:** these actions informed the development of the Economic Development Action Plan.

### 3.3.5 Goulburn CBD Occupancy Audit

An audit of the occupancy status of Goulburn’s main street (Auburn Street) and two malls has been undertaken by Council’s Economic Development Team on a quarterly basis since December 2011, at which time 15% of properties in the study area were vacant. Occupancy does tend to be cyclical with the fewest vacancies in the December quarter and highest in the cooler months. Various models of “pop up” programs such as Renew are currently under consideration by Council.



**Figure 32: Goulburn NSW – Economic Impact Assessment 2012**

This report is an assessment of retail need and economic impacts in response to a proposal to develop 4,500m<sup>2</sup> of neighbourhood shops (supermarket, ancillary retail and mixed recreational facility) on the outskirts of Goulburn. Analysis found “compelling evidence to suggest that Goulburn could support additional supermarket floorspace”, and:

- The development would be supportable without a major redirection of trade from the CBD;
- The trading impact on the CBD would be in the order of 10 – 11%;
- Impact on bulky goods, specialty retail, cafes, restaurants etc would be negligible; and
- The development could support 870 direct and 331 indirect jobs across Goulburn and the region.

This planning proposal was unsuccessful, however a smaller development of similar character was approved by Council in 2015.

### 3.3.6 Outcomes and Implications for the Strategy

These studies on different aspects of the Goulburn Mulwaree economy and development potential have identified various challenges and opportunities. They also provide a number of recommendations which could be important considerations for the Strategy. The following is a brief summary of the findings from these reports:

#### Challenges

- Retail variety and range is limited within Goulburn;
- Land ownership issues in the main street; and
- Limited public transport to Canberra.

#### Opportunities

- The proximity of the LGA/Goulburn to population and other economic centres in Western Sydney and Canberra; and
- Quarrying and mining, and related support services.

#### Recommendations

- Transport logistics and archival storage;
- Extractive industries;
- Build on Goulburn's location between Sydney Canberra and the coast; and
- Identify potential sites for industrial development.

## 3.4 SUMMARY - IMPLICATIONS FOR INDUSTRIAL, RETAIL AND COMMERCIAL DEVELOPMENT

A summary of the trends, opportunities and challenges for Employment Lands within Goulburn Mulwaree identified from an extensive analysis of statutory and strategic documentation and retail, employment and further studies, is provided in this section. A comprehensive assessment of issues identified throughout the literature is provided in Table 11.

From the literature it has been identified that it is timely for Council to undertake the Employment Lands Strategy. The age and coverage of previous investigations are comprehensive but are, to some extent, dated. A range of initiatives and issues identified in various strategies have been resolved and progressed to completion. These include but are not limited to:

- The resolution of infrastructure challenges in water supply and sewerage;
- The commencement of streetscape improvements within the CBD (Auburn Street);
- The transition of large footprint non-CBD based land use (eg car yards) to the Hume Street Precinct; and
- The commencement of actions to assist CBD land holders to address heritage protection measures while undertaking building works.

At the same time, various opportunities identified in the literature have since been realised, including the importance of the quarrying industry in Marulan, and a high level of activity supporting local businesses having commenced.

The literature points to a number of sectors underpinning the economy of Goulburn. These include freight and logistics, manufacturing, government sector, retail and trade, primary industries, health services and quarrying. The employment sector which is underrepresented in terms of its contribution to Goulburn is education, with a limited TAFE presence, the NSW Police Academy and no further tertiary institutions. It is noted that there have been a range of proposals, some of which are current, for private education institutions.

The initial identification of different precincts and sub-precincts identifies a range of employment land uses.

The employment uses which have developed in Goulburn Mulwaree are based on underlying factors and drivers consistently referenced, including:

- High level of accessibility to population centres in Canberra and Western Sydney;
- Good transport connections in terms of highway and rail infrastructure;
- Relative affordability of industrial and residential land;
- High residential amenity;
- Population growth and demographic change with an increase of over 65s from 13.5% in 2006 to 27.8% in 2031;
- Previous Government decisions to locate institutions in Goulburn;
- Specific investment in infrastructure items (water and sewerage upgrade); and
- Location of resources - including hard rock and limestone at Marulan and a waste management bioreactor at Tarago around which are unmined resources, which Heron Resources are seeking funding to extract.

In developing the Strategy, the primary consideration is to draw together the range of internal and external drivers and underlying supporting factors into a coherent strategy which will support existing industries and preserve opportunities for emerging industries which align with the strengths of Goulburn Mulwaree.

Table 10: Summary of Trends, Opportunities and Challenges for Employment Lands Within Goulburn Mulwaree LGA

Theme	Challenges	Opportunities	Initiatives
<b>Development</b>	<ul style="list-style-type: none"> <li>Balancing heritage management and new development particularly in the CBD</li> <li>Land ownership fragmentation</li> <li>Industrial land fragmentation</li> <li>Reliance on outside investment</li> <li>Agricultural sector in decline</li> </ul>	<ul style="list-style-type: none"> <li>Scheduled review of Local Environmental Plan 2009 and Development Control Plan 2009</li> <li>Public/private partnerships</li> <li>Clustering service industries &amp; strengthening CBD</li> <li>Strong demand and availability of affordable land <ul style="list-style-type: none"> <li>Migrant resettlement</li> </ul> </li> </ul>	
<b>Education</b>	<ul style="list-style-type: none"> <li>Lack of skilled labour</li> <li>Lack of knowledge and technology workers</li> <li>Lack of tertiary education providers</li> <li>Reluctance to up skill</li> <li>Lack of entrepreneurial skills</li> </ul>	<ul style="list-style-type: none"> <li>High demand for Education (High School)</li> </ul>	<ul style="list-style-type: none"> <li>Proposed smart work hub</li> <li>Proposed vocational education centre – old psychiatric hospital</li> </ul>
<b>Location</b>	<ul style="list-style-type: none"> <li>Proximity to larger employment centres</li> <li>Proximity to specialist service industries elsewhere</li> </ul>	<ul style="list-style-type: none"> <li>Proximity to: Sydney, Canberra, Melbourne and South Coast <ul style="list-style-type: none"> <li>Commuter demand for rural urban lifestyles</li> </ul> </li> <li>Located along major transport routes - Hume Highway, Main Road 92 and Great Southern Railway <ul style="list-style-type: none"> <li>Tourism</li> </ul> </li> <li>Local resources <ul style="list-style-type: none"> <li>Mineral deposits</li> <li>Quarrying materials</li> <li>Supporting industries and services</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Potential logistics hub</li> <li>Storage collection from museums/art galleries</li> </ul>
<b>Infrastructure &amp; Service Provision</b>	<ul style="list-style-type: none"> <li>Infrastructure upgrades required <ul style="list-style-type: none"> <li>Sewerage, drainage, electricity</li> <li>Roads</li> <li>Waste facility at capacity</li> <li>IT - Broadband</li> </ul> </li> <li>Public transport around Goulburn and towards Canberra <ul style="list-style-type: none"> <li>Lack of demand</li> <li>Lack of funding</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Planned infrastructure upgrades</li> <li>Wastewater treatment plant upgrade</li> <li>IT advances</li> <li>Established airport &amp; facilities</li> <li>Stable and affordable natural gas supply</li> <li>High level telecommunications supply</li> </ul>	<ul style="list-style-type: none"> <li>Rail freight hub proposal</li> <li>NBN rollout</li> <li>Northern interchange upgrade</li> <li>Public transport from Canberra being supplemented by Greyhound Bus services</li> </ul>

Theme	Challenges	Opportunities	Initiatives
<b>Economic</b>	<ul style="list-style-type: none"> <li>• Tourism and service based economy               <ul style="list-style-type: none"> <li>○ Prone to vulnerabilities in markets</li> <li>○ Evidence of escape spending</li> </ul> </li> <li>• Low population growth               <ul style="list-style-type: none"> <li>○ Migration from Goulburn</li> <li>○ Ageing population</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Diversifying economy</li> <li>• Renewable energy sector – Tarago and surrounding LGAs</li> <li>• Government               <ul style="list-style-type: none"> <li>○ Goulburn Gaol</li> <li>○ Police Academy</li> <li>○ Council</li> <li>○ Potential State Government offices</li> </ul> </li> <li>• Health related industry</li> <li>• Increasing interest in education sector</li> </ul>	<ul style="list-style-type: none"> <li>• Aged care sector</li> <li>• Rehabilitation unit in hospital</li> </ul>

## 4 CONCLUSION

The **Background Report** provides:

- The locational context of employment lands located within Goulburn Mulwaree LGA;
- A comprehensive overview of the statutory and strategic context; and
- A review of relevant documentation associated with employment lands within Goulburn Mulwaree.

The **Background Report** identified that Goulburn Mulwaree is strategically located along the Sydney to Canberra Corridor; has significant existing transport infrastructure advantages and is located within an area of NSW which is rich in mineral/quarrying resources. Further, a number of previous constraints - for example water scarcity, have now been resolved.

From a review of the documentation, a number of key challenges and opportunities for generating employment within the Goulburn Mulwaree LGA have been identified, from a local and regional perspective. The identification of these challenges and opportunities is a valuable process, as it will inform and drive the stakeholder engagement process to ensure the Strategy is addressing local and regional needs.